Learner Outcomes Tracking System (LOTS)

Skills Development Fund Grants

Grantee Portal

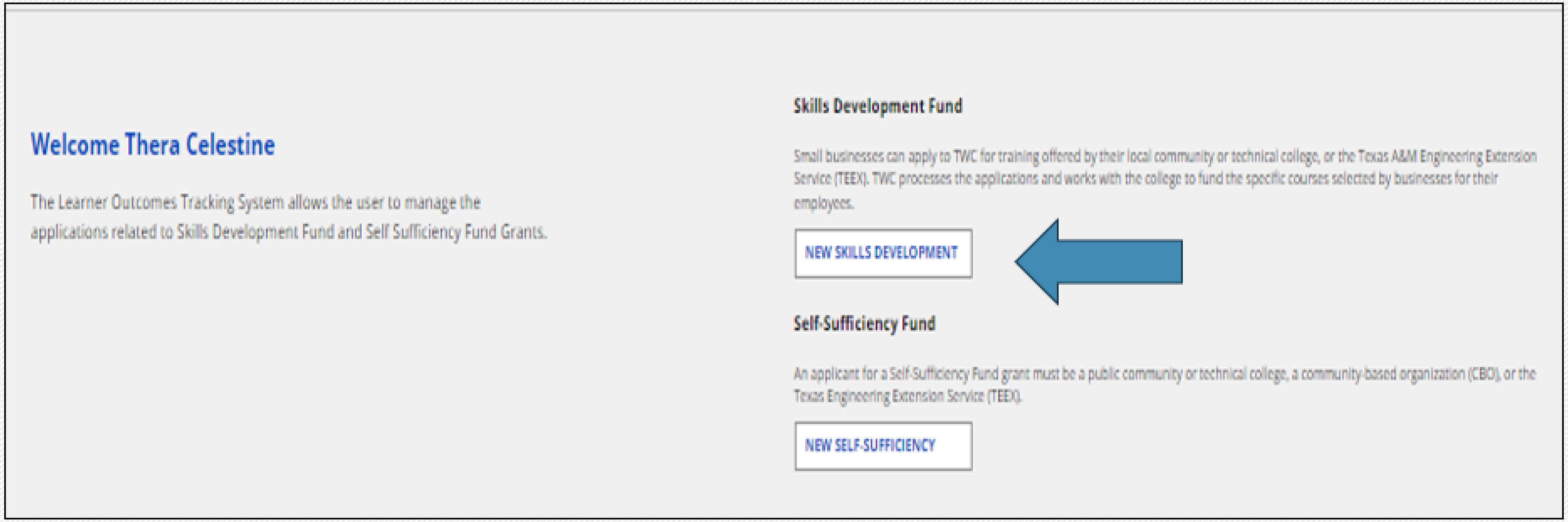
February 2024

Agenda

1. Creating a Skills Development Fund Project
2. Completing a Skills Development Fund Application
3. Adding a Business Partner to a Skills Development Fund Application
4. Adding and Modifying Employee Participants
5. Performing Additional Actions

Skills Development Fund – Getting Started

1. Log into the LOTS Grantee Portal
2. From the Home page, click the NEW SKILLS DEVELOPMENT button



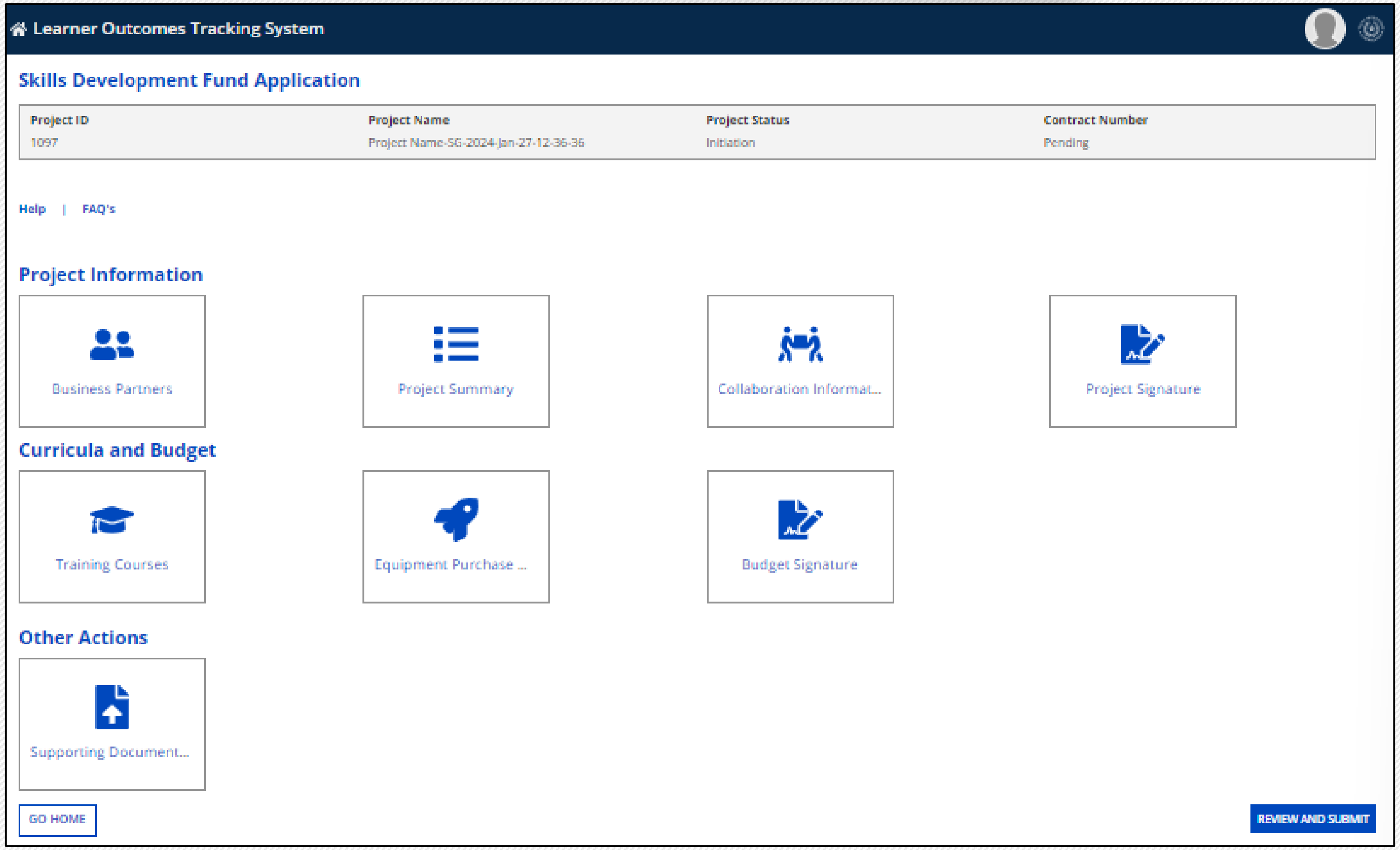
Skills Development Fund – Grant Application Page

The Skills Development Fund page displays. Project Information bar appears at the top of the page and contains Project ID, Project Name, Project Status and Contract Number (when applicable).

Information on this page appears in three main sections:

- Project Information
- Curricula and Budget
- Other Actions

Note: On the bottom left-hand corner of the screen, select GO HOME to return to the HOME screen.



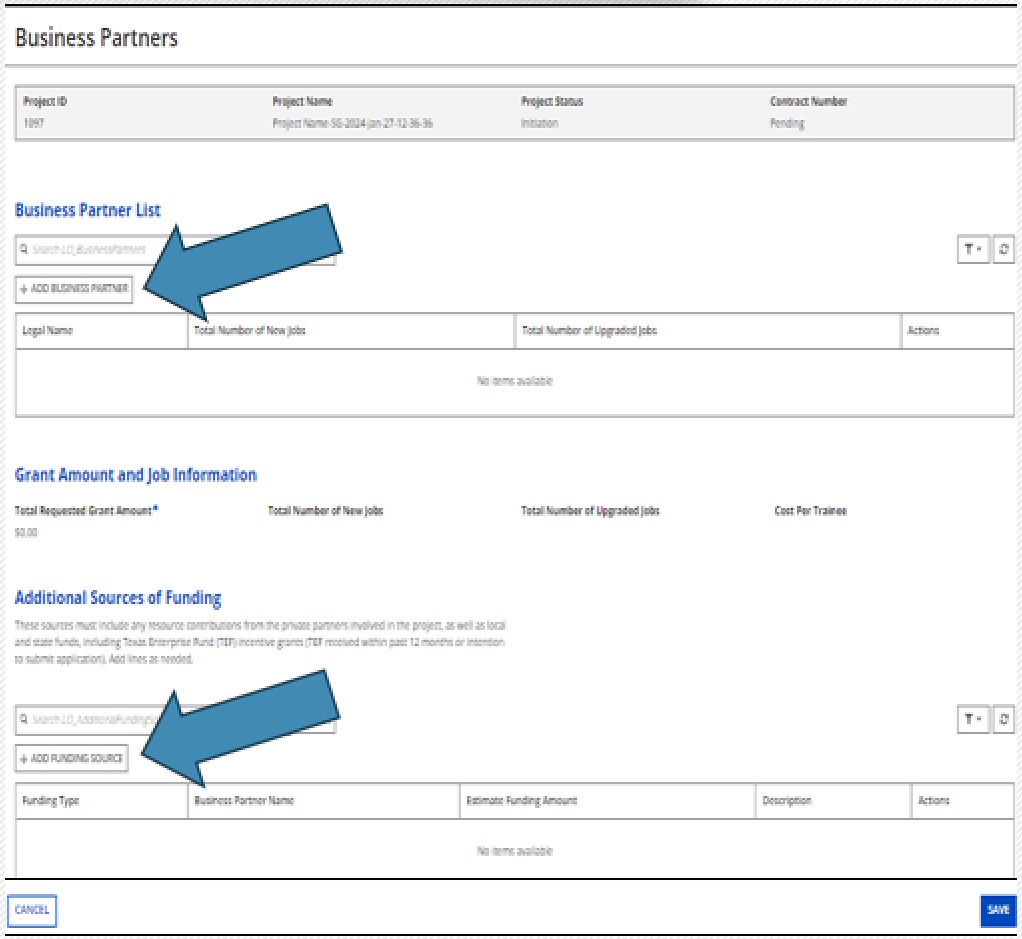
Skills Development Fund – Business Partners

Under the Project Information section, select the Business Partners icon. The Business Partner page will display.

Use the ADD BUSINESS PARTNER button to add a new Business Partner to the project.

Use the ADD FUNDING SOURCE button to add additional funding source information.

After Business Partners and Sources of Funding have been added to the project, the SEARCH field can be used to search for a specific Business Partner or Source of Funding. View all Business Partners or Sources of Funding tied to the project in their designated table.

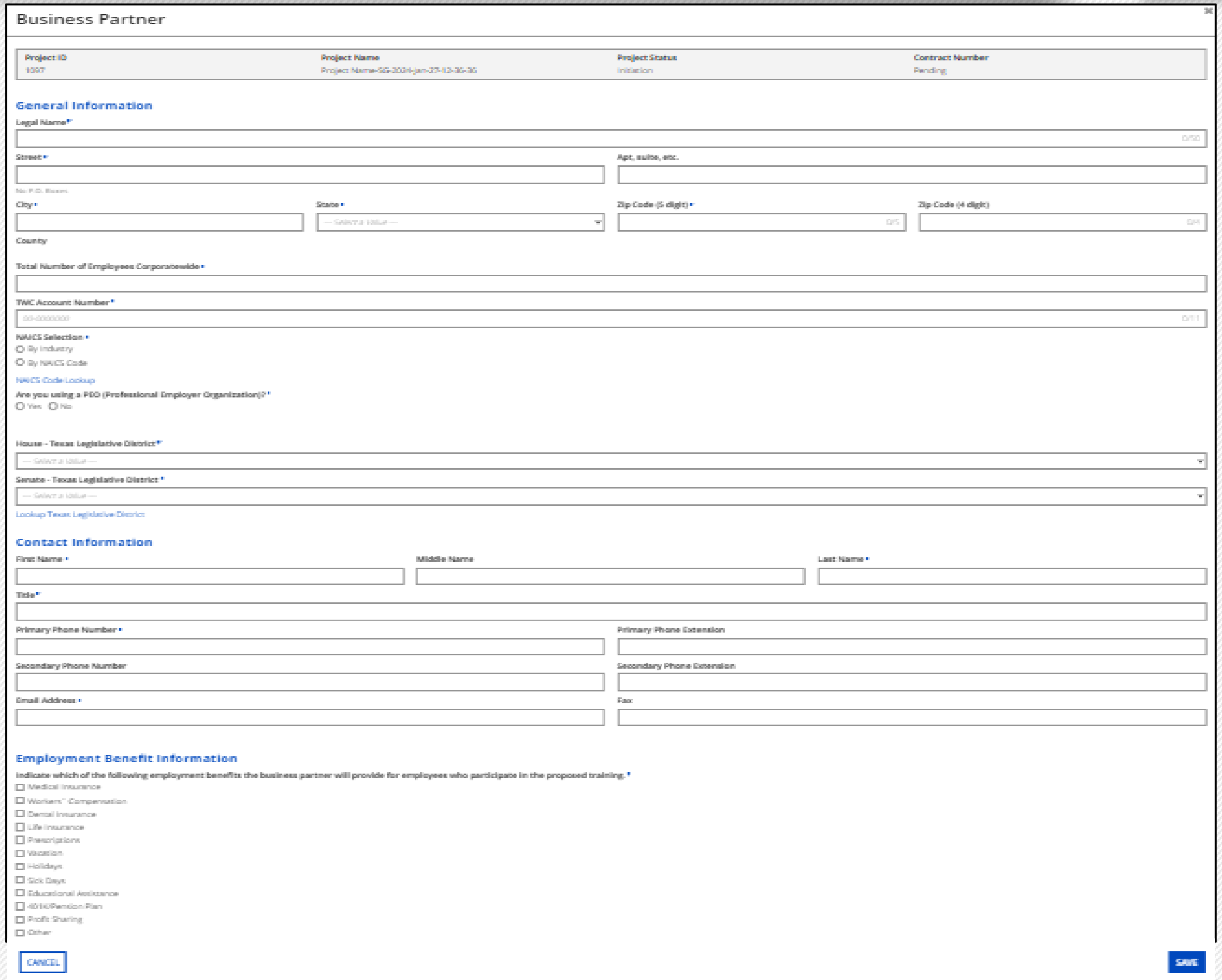


Skills Development Fund – Adding a Business Partner

Click ADD BUSINESS PARTNER button and the Business Partner page appears.

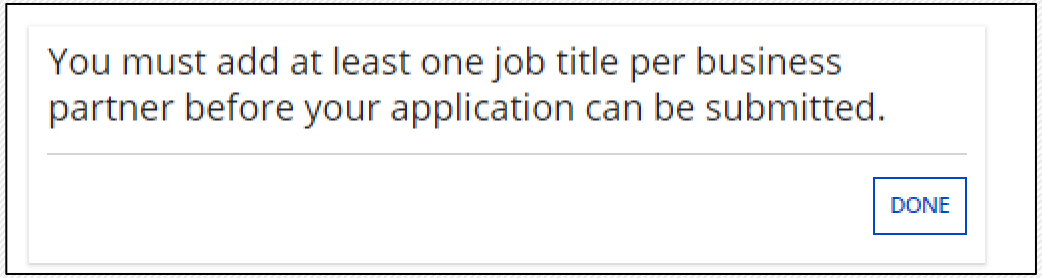
Complete the General Information, Contact Information, and Employment Benefit Information sections.

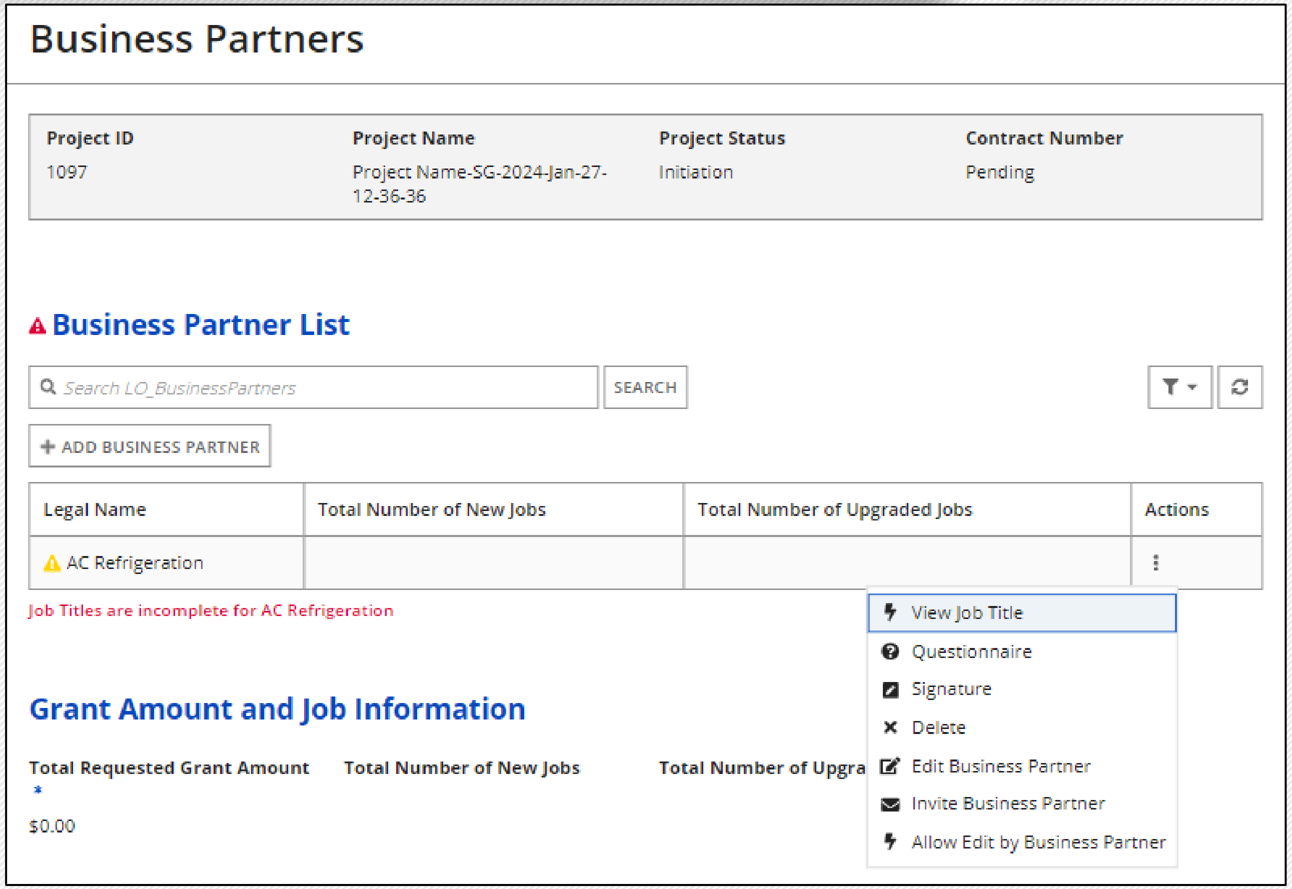
Click CANCEL to return to the Business Partner page or click SAVE to save the new Business Partner.



Skills Development Fund – Viewing an Existing Business Partner

Upon Saving the information for the new Business Partner, a Job Title alert message displays. Click Done. The Business Partner List page displays, and the newly added Business Partner appears in the list table.



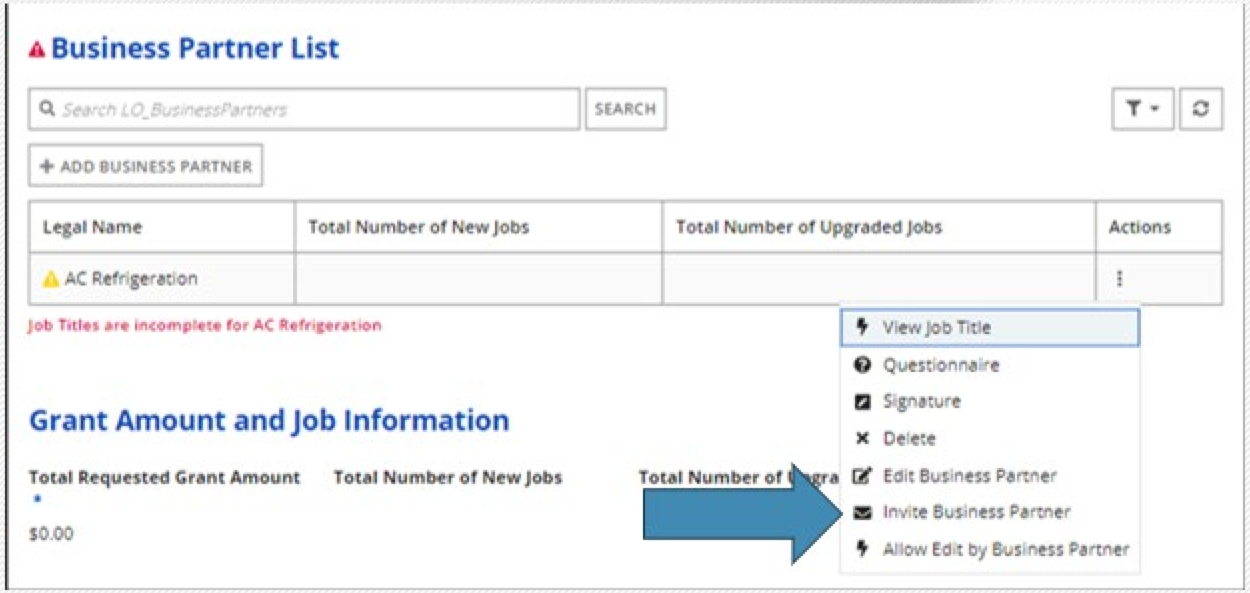


Skills Development Fund Invite Business Partner

Once the Business Partner has been added, the Business Partner contact will automatically receive an email notification with an invitation to access the Learners Outcomes Tracking System (LOTS) Application Portal and a link to create their credentials.

If the above email expires, under Actions click Invite Business Partner to initiate a second email. Notification of the email invite being sent will appear as a popup on the screen.

Once the Business Partner has registered, they will have access to review and update the required documents related to their participation in the grant.

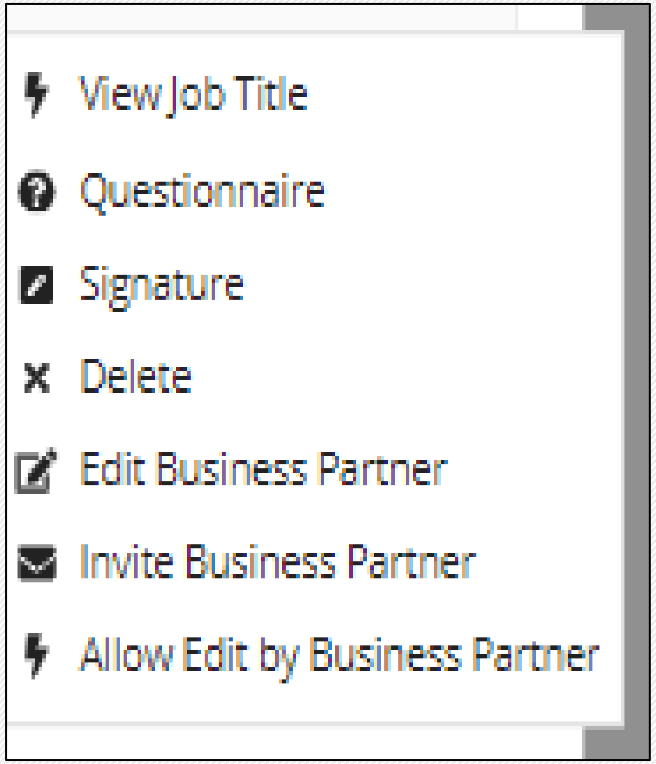


Note: The invitation to access LOTS as a Business Partner will be sent once the Business Partner information is SAVED. The Invite Business Partner feature should only be used if the link in the initial email expires.

Skills Development Fund – Adding Job Titles and Editing an Existing Business Partner

Click the three buttons under the Actions column to:

1. View Job Title – displays the Job Title Information screen where Users can view existing Job Titles or add a new job title for that Business Partner
2. Questionnaire – view responses from Business Partner for prompted questions
3. Signature – view Business Partner signature in read-only view
4. Delete – delete the Business Partner
5. Edit Business Partner – will display the Business Partner detail page with fields open for editing
6. Invite Business Partner – send an email to the Business Partner allowing them access to the project
7. Allow Edit by Business Partner – allows the Business Partner to make edits to the Business Partner information AFTER a signature has been obtained



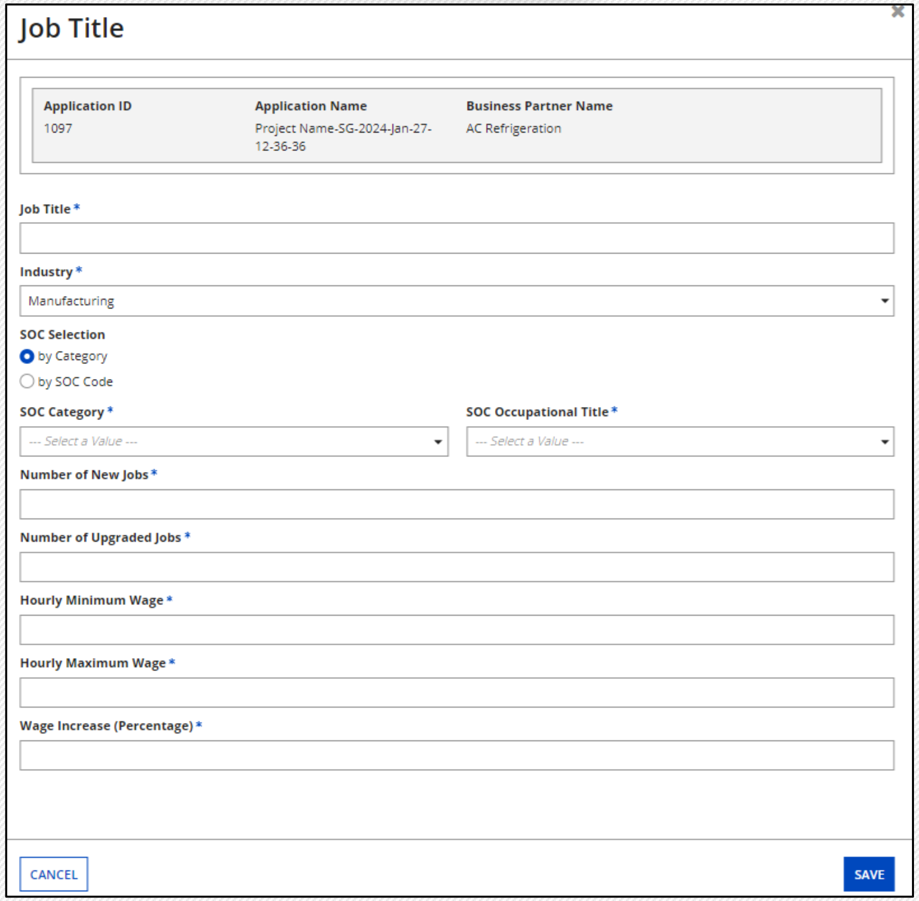
Skills Development Fund- Add Job Title Information

In the Business Partner List, under the Action column, click View Job Title button

The Job Title Information List appears. Click the ADD JOB TITLE button then the Job Title page appears.

Complete all required fields on the Job Title page.
Click CANCEL to return to the Job Title Information List page or click SAVE to save the Job Title.

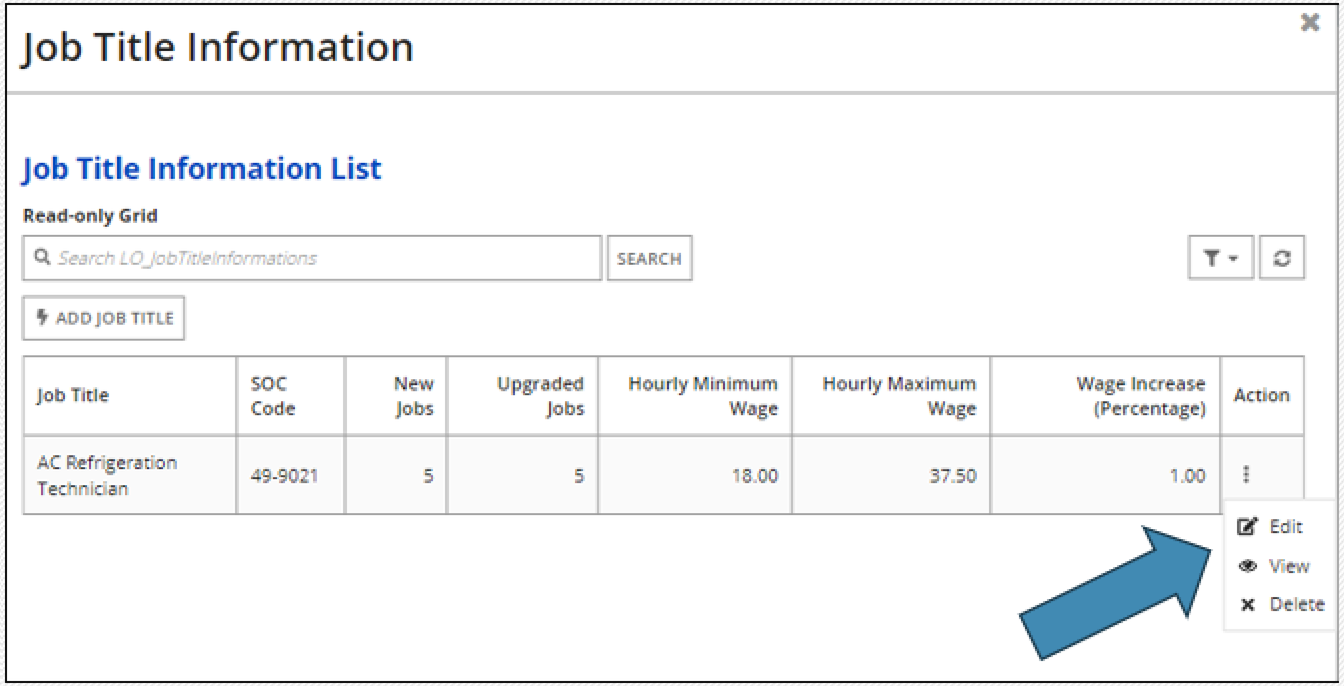
Note: If the Job Title does not meet prevailing wage, an error message will appear with the minimum hourly wage. The participant will need to meet prevailing wage to participate in the project



Skills Development Fund- Job Title Information List

Once the Job Title has been added, the SEARCH field can be used to search for a specific Job Title within the project.

If changes are needed to an existing Job Title, select the three dots under the Action column to Edit, View or Delete a Job Title.

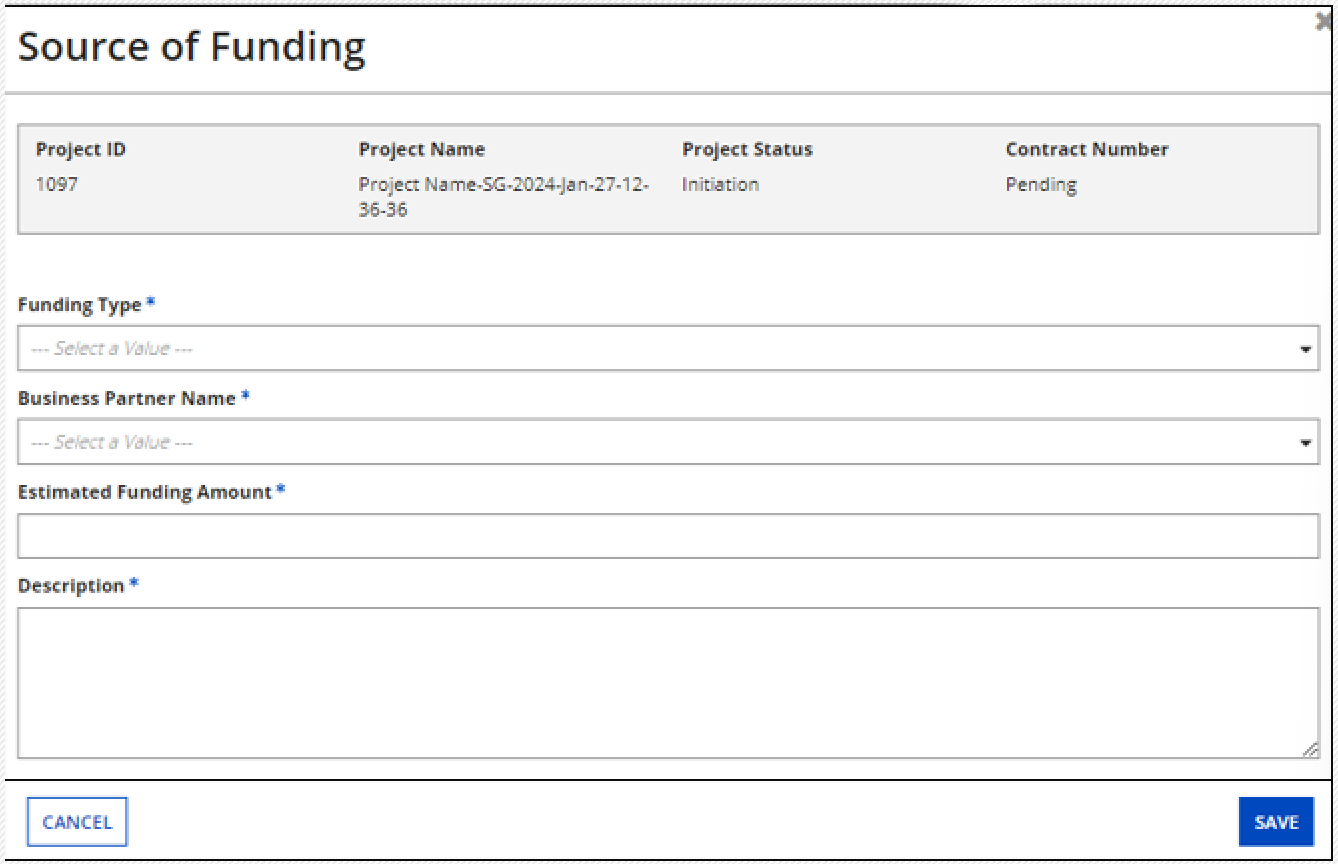


Skills Development Fund- Additional Sources of Funding

Sources of Funding Information allows the user to enter sources of funding (cash, in-kind, grant)

- Select the Funding Type from the drop-down menu
- Select the Business Partner Name from the drop-down menu
- Enter Estimated Funding Amount and Description.

Click CANCEL to return to the Business Partner page or click SAVE to save the Source of Funding.

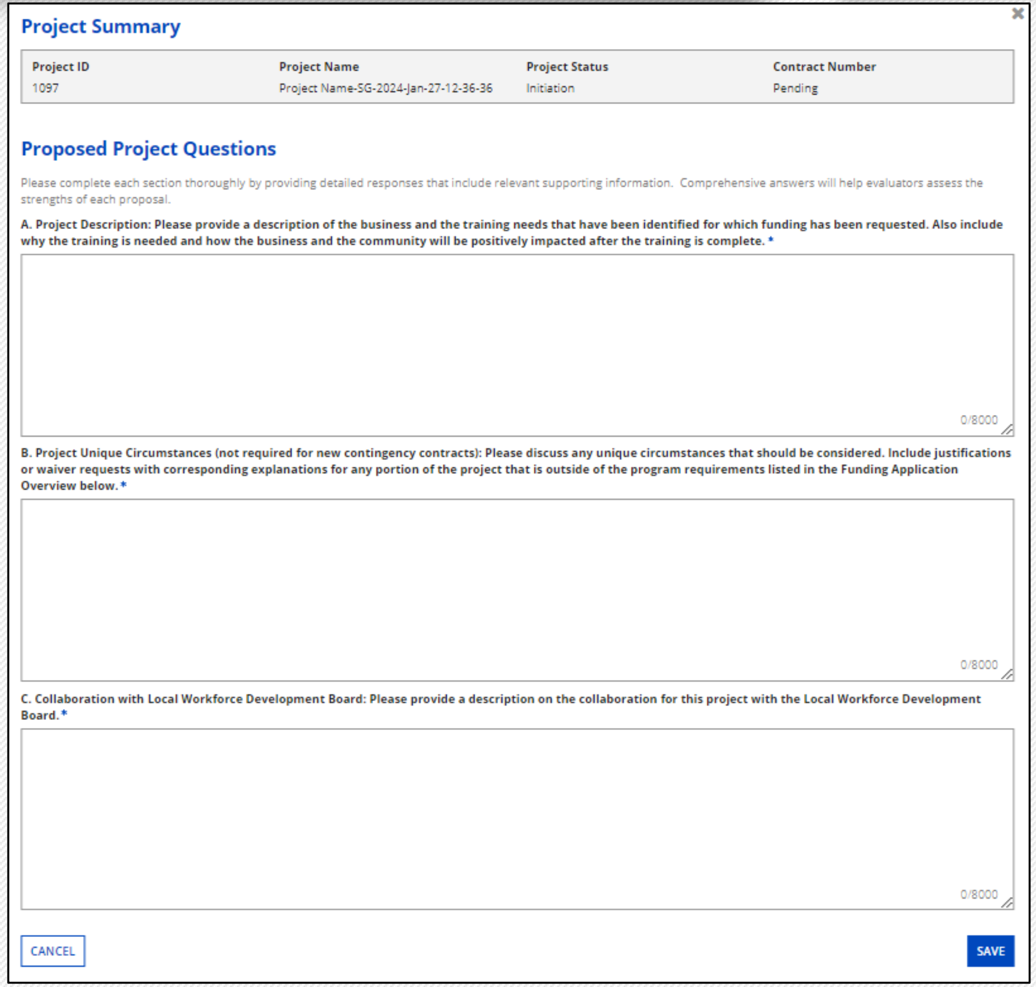


Skills Development Fund – Project Summary

Click the Project Summary icon to display the Project Summary page.

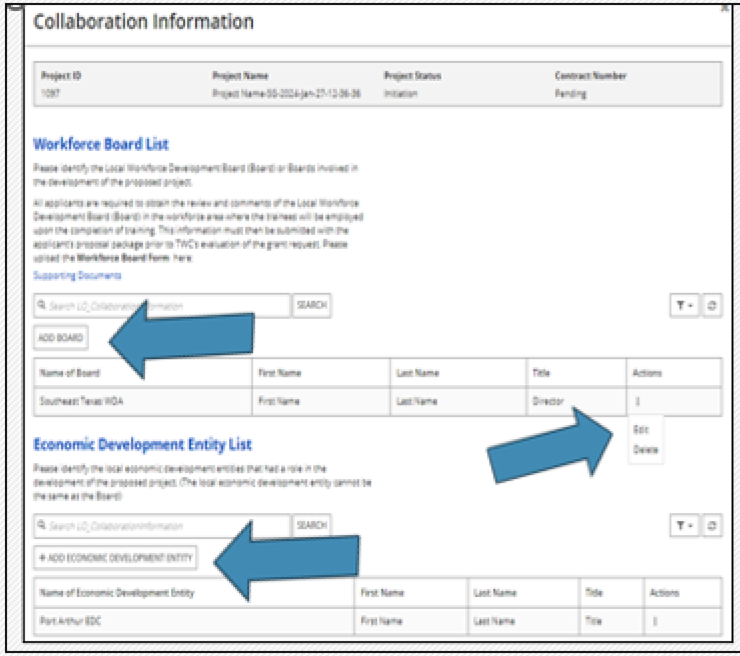
Complete the Proposed Project Questions.

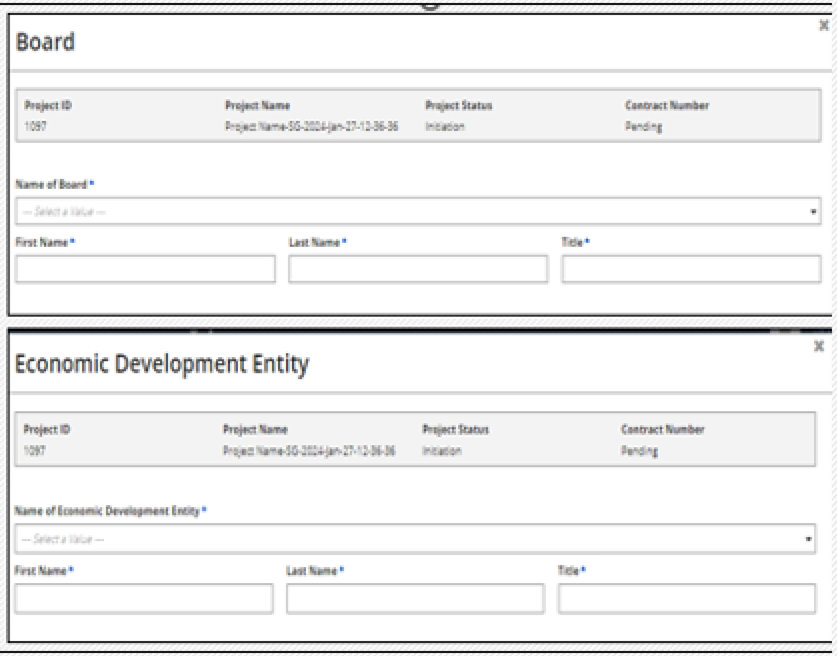
Click CANCEL to return to the Skills Development Fund Application page or click SAVE to save the Proposed Project Questions.



Skills Development Fund – Collaboration Information

- Click the Collaboration Information icon to add and edit Workforce Board information and Economic Development Entities.
- Click ADD BOARD to add Workforce Board information.
- Click ADD ECONOMIC DEVELOPMENT ENTITY to add Economic Development Entity information.





Click CANCEL to return to the Collaboration Information page or click SAVE to save the Board and Economic Development Entity information

Once the Board and Economic Development Entity have been added, use the SEARCH field to search for a specific Board or Economic Development Entity tied to the project.

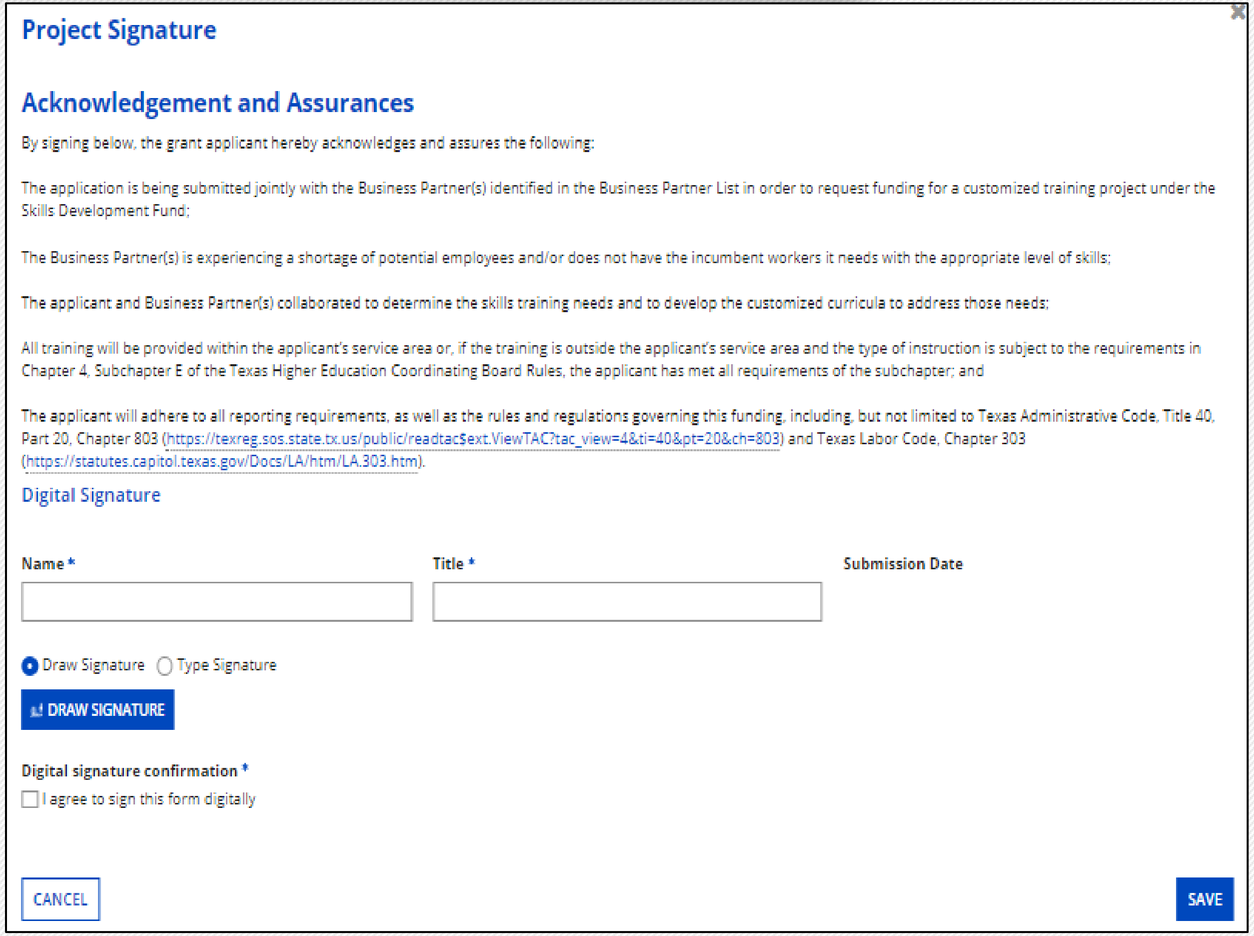
Click Edit or Delete under Action to make any changes to the Board and Economic Development Entity information

Skills Development Fund – Project Signature

Click the Project Signature icon and the Project Signature page appears. Read and review the Acknowledgement and Assurances then provide a Digital Signature.

Click CANCEL to return to the Skills Development Fund Grant Application page or click SAVE to save the Digital Signature.

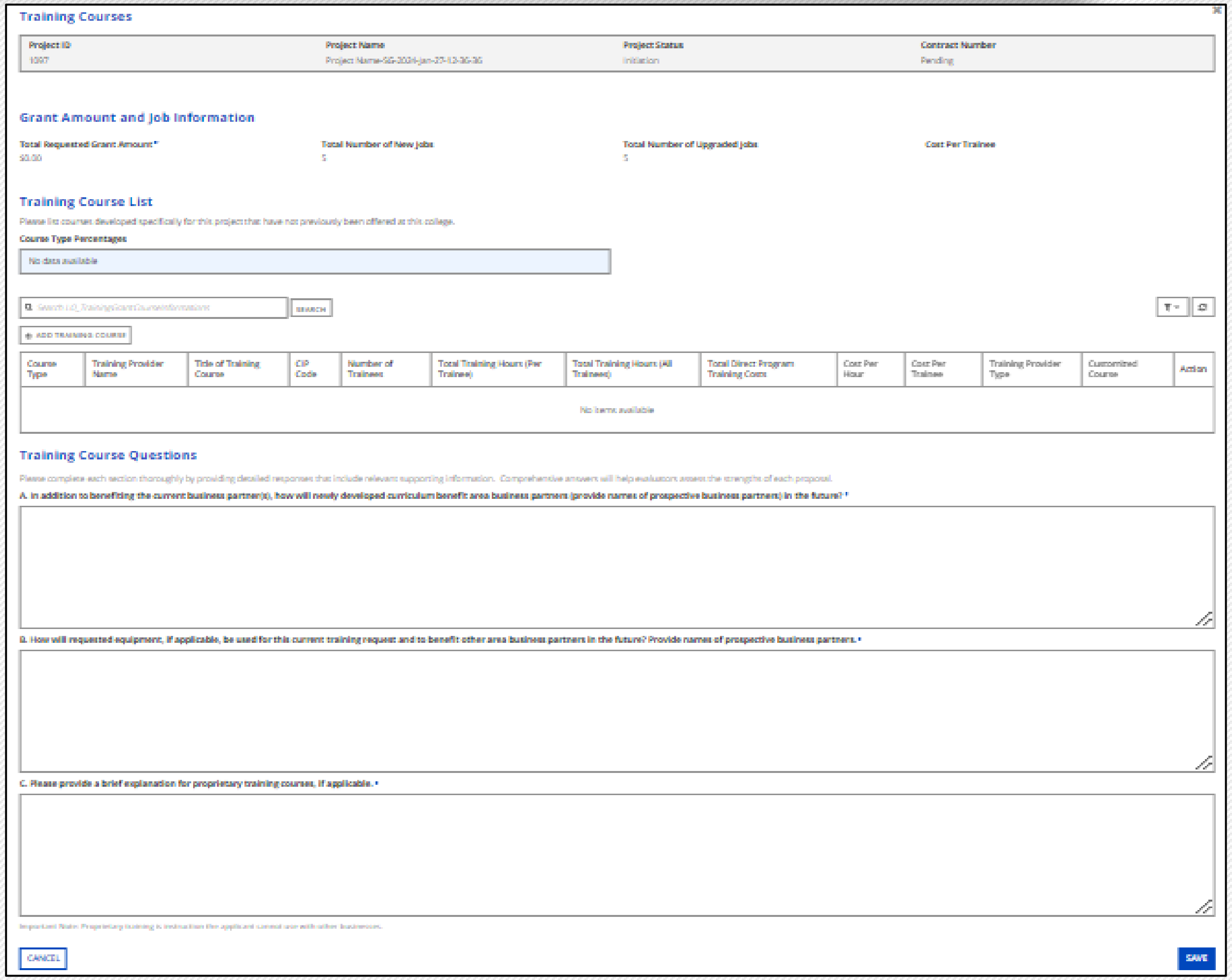
Note: TWC Staff has the ability to make changes to most parts of the grant application however, Staff cannot answer some questionnaires, nor do they have the capability to add or edit signatures.



Skills Development Fund –Training Courses

Click the Training Courses icon to open the Training Courses Page.

This page displays the Grant Amount and Job Information (auto-populated), Training Course List and Training Course Questions.



Skills Development Fund – Adding a Training Course

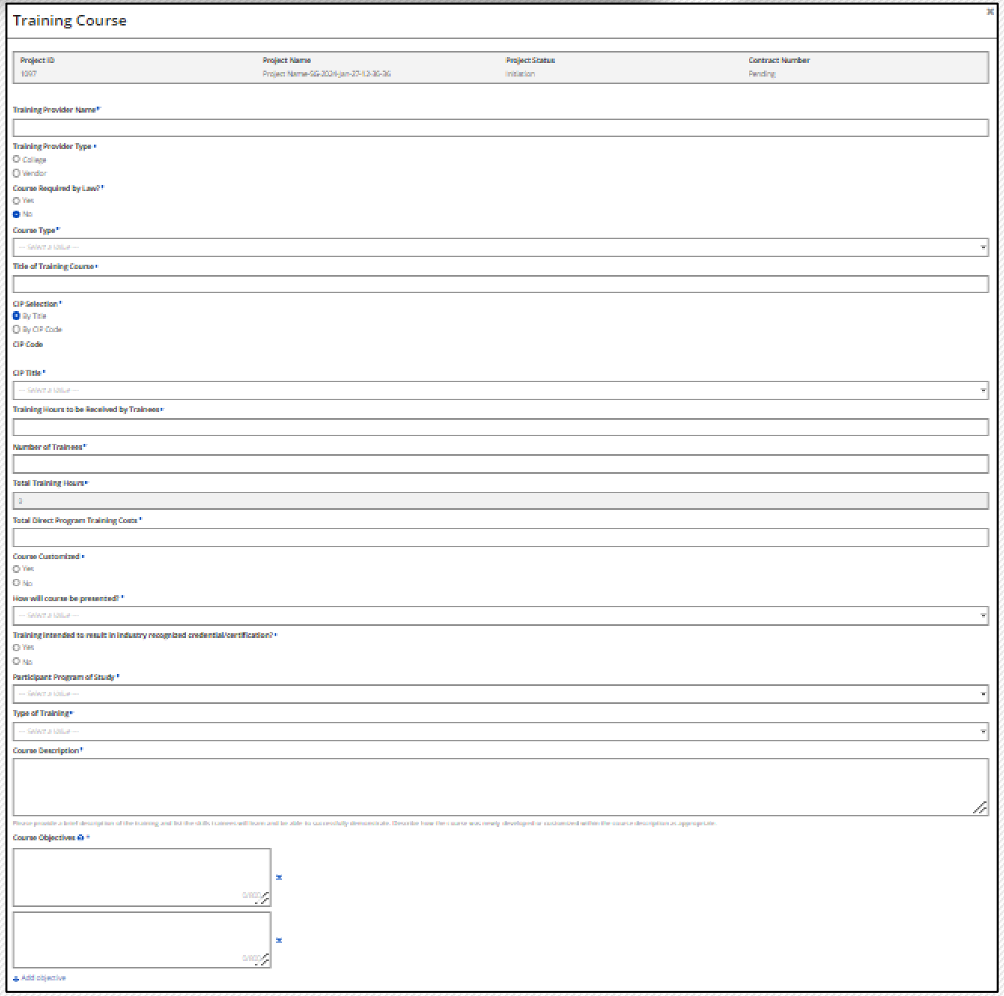
Under the Training Course List, click the ADD TRAINING COURSE button to display the Training Course detail page.

Complete all required fields for the training course.

Note the following:

- If the training provider is a vendor, additional information will appear and is required
- To add a course, a course description and at least two course objectives are required. Additional objectives can be added by clicking the Add Objective button.

Click CANCEL to return to the Training Course page or click SAVE to save the Trainee Course.

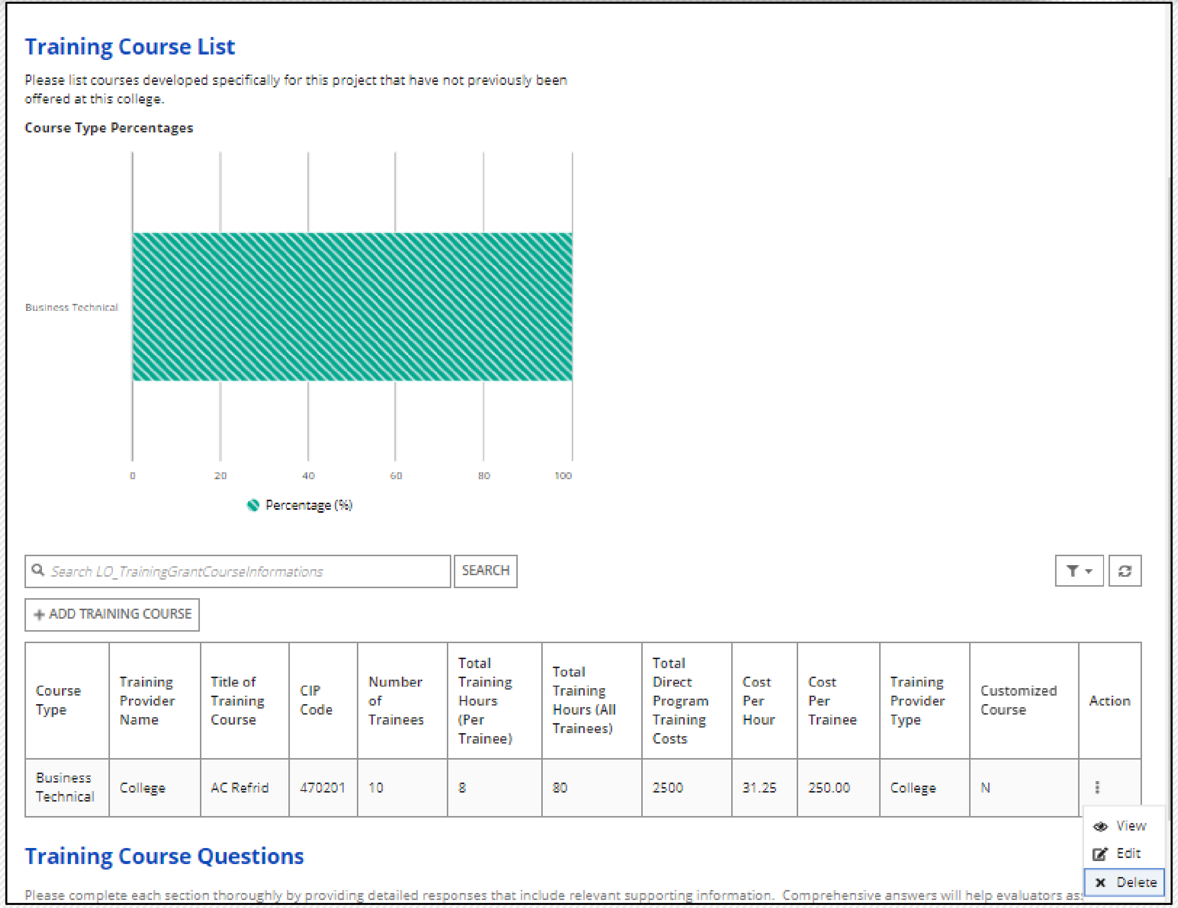


Skills Development Fund – Viewing and Editing an Existing Training Course

All saved training courses will appear in the Training Course List.

A chart will appear which displays the percentage of each training category.

Use the dots under the Action column within the table to view, edit or delete an existing training course.



Skills Development Fund – Training Course Questions

On the Training Courses page, complete the Training Course Questions.

Click CANCEL to return to the project dashboard or click SAVE to save responses or edits to the Training Course Questions.

Training Course Questions

Please complete each section thoroughly by providing detailed responses that include relevant supporting information. Comprehensive answers will help evaluators assess the strengths of each proposal.

A. In addition to benefiting the current business partner(s), how will newly developed curriculum benefit area business partners (provide names of prospective business partners) in the future?*

B. How will requested equipment, if applicable, be used for this current training request and to benefit other area business partners in the future? Provide names of prospective business partners. *

C. Please provide a brief explanation for proprietary training courses, if applicable. *

Important Note: Proprietary training is instruction the applicant cannot use with other businesses.

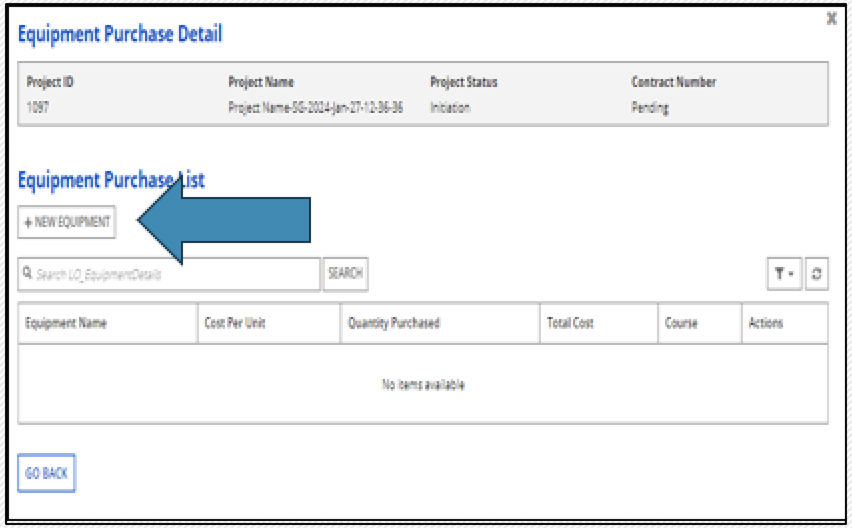
CANCEL

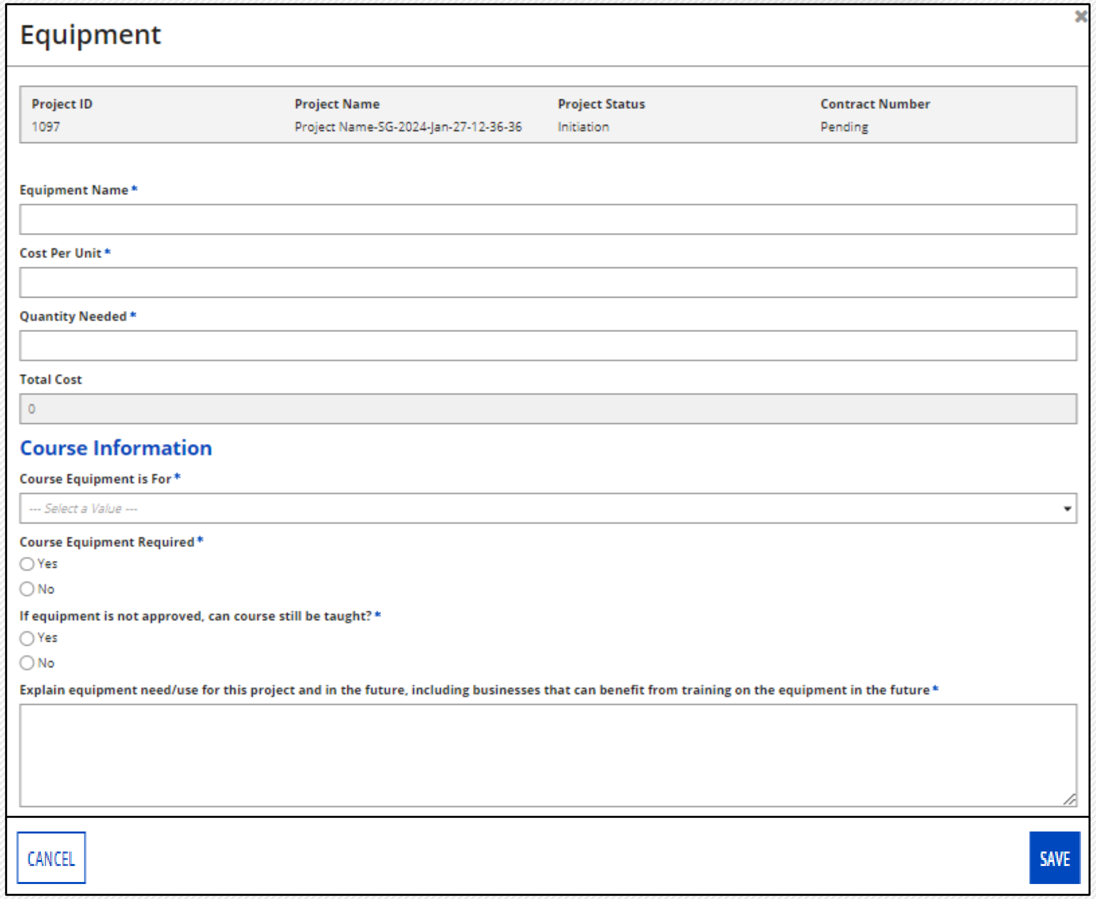
SAVE

Skills Development Fund – Adding Equipment

Click the Equipment Purchase Detail icon and the Equipment Purchase Detail page will appear.

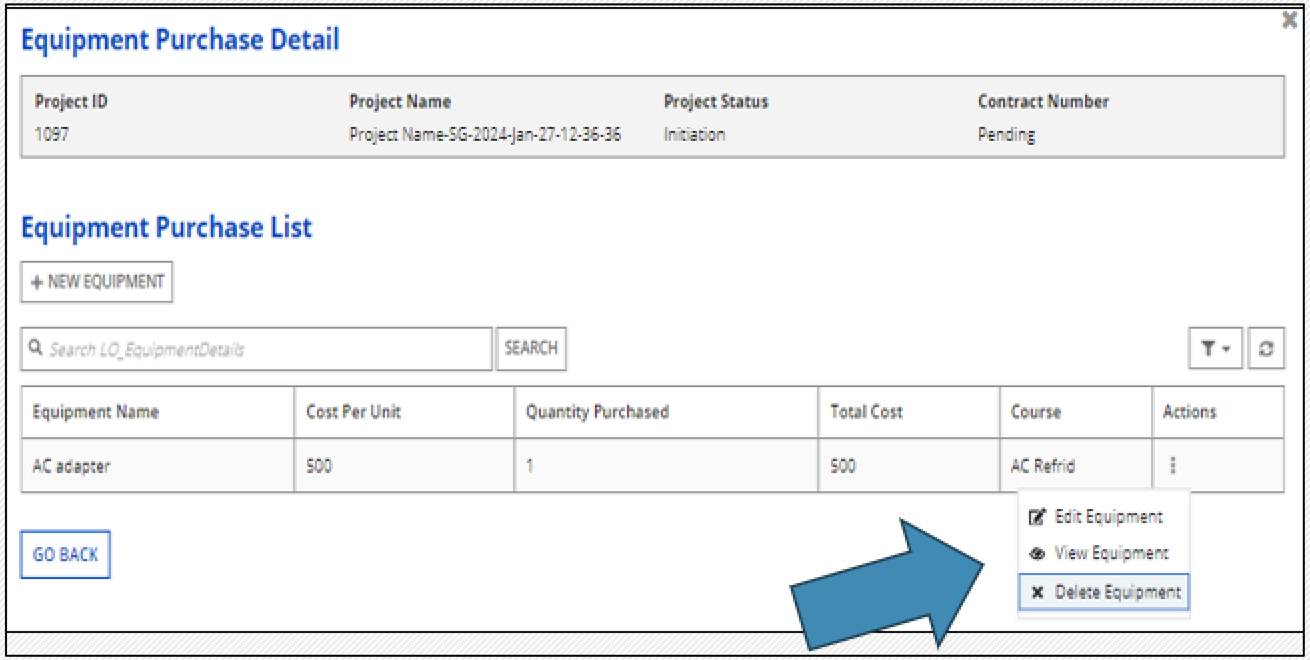
Under the Equipment Purchase List section, click the NEW EQUIPMENT button and enter the Equipment details





Skills Development Fund – Editing Equipment

Edit, View or Delete equipment that has been added to the project by using the dots under the Actions column found in the Equipment Purchase List table within the EQUIPMENT PURCHASE DETAIL page.

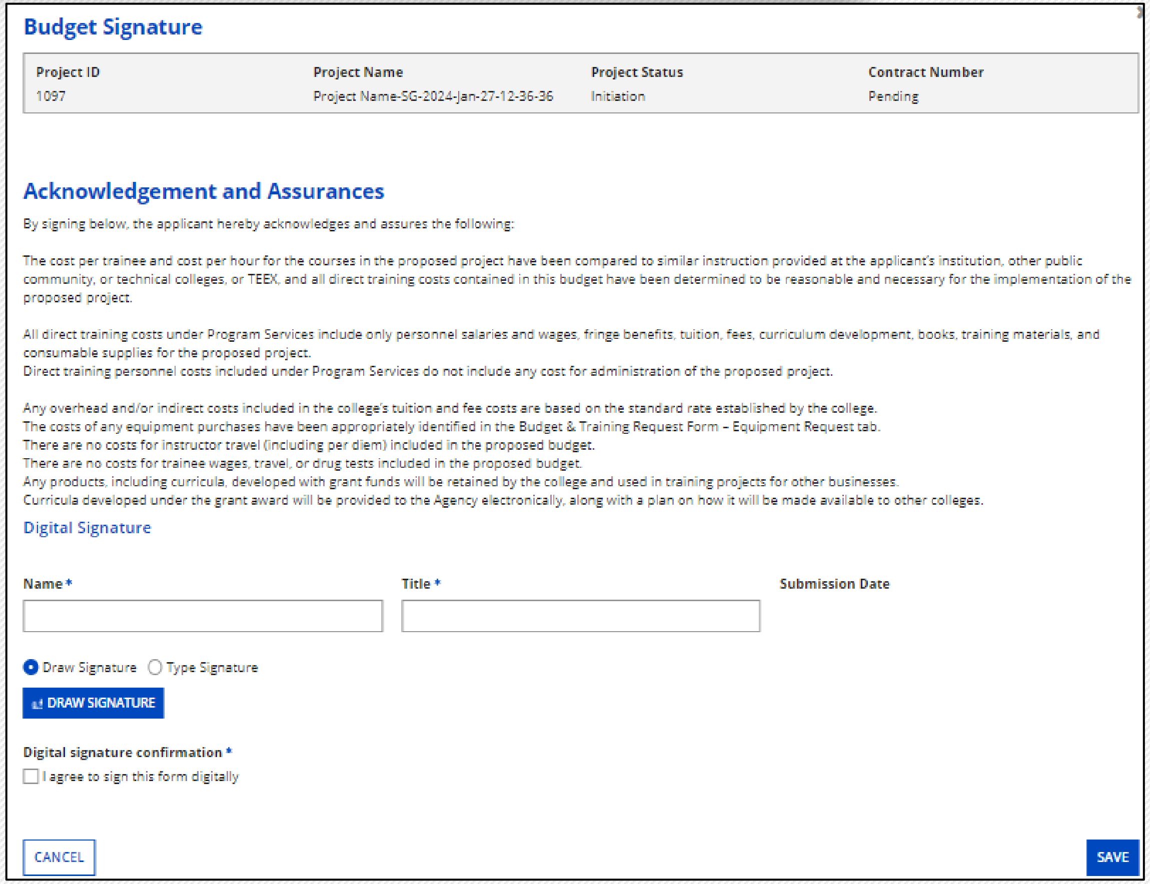


Skills Development Fund – Budget Signature

Click the Budget Signature icon and the Budget Signature page will appear.

Read and review the Acknowledgement and Assurances then provide a Digital Signature.

Click CANCEL to return to the Skills Development Fund Grant Application page or click SAVE to save the Digital Signature.



Budget Signature

Project ID	Project Name	Project Status	Contract Number
1097	Project Name-SG-2024-Jan-27-12-36-36	Initiation	Pending

Acknowledgement and Assurances

By signing below, the applicant hereby acknowledges and assures the following:

The cost per trainee and cost per hour for the courses in the proposed project have been compared to similar instruction provided at the applicant's institution, other public community, or technical colleges, or TEEX, and all direct training costs contained in this budget have been determined to be reasonable and necessary for the implementation of the proposed project.

All direct training costs under Program Services include only personnel salaries and wages, fringe benefits, tuition, fees, curriculum development, books, training materials, and consumable supplies for the proposed project.
Direct training personnel costs included under Program Services do not include any cost for administration of the proposed project.

Any overhead and/or indirect costs included in the college's tuition and fee costs are based on the standard rate established by the college.
The costs of any equipment purchases have been appropriately identified in the Budget & Training Request Form – Equipment Request tab.
There are no costs for instructor travel (including per diem) included in the proposed budget.
There are no costs for trainee wages, travel, or drug tests included in the proposed budget.
Any products, including curricula, developed with grant funds will be retained by the college and used in training projects for other businesses.
Curricula developed under the grant award will be provided to the Agency electronically, along with a plan on how it will be made available to other colleges.

Digital Signature

Name * | Title * | Submission Date

Draw Signature | Type Signature

DRAW SIGNATURE

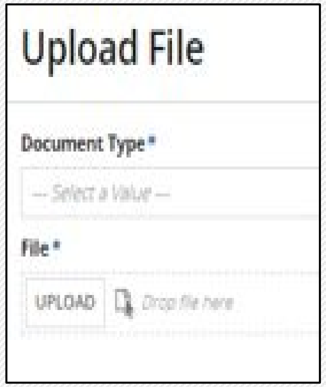
Digital signature confirmation *

I agree to sign this form digitally

CANCEL | SAVE

Skills Development Fund - Supporting Documentation

Clicking the Supporting Documentation button displays the Supporting Documentation page. From this page, Users can search for existing supporting documents or add a new supporting document by clicking the UPLOAD FILE button.



Select the Document Type from the dropdown menu and use the UPLOAD button or the ”Drop file here” features to add the document to the project. Once added, the document will appear in the Document List table on the Supporting Documentation page. Click the document name to download and view the document.

Click CANCEL to return to the Supporting Documentation page or click SAVE to save the Supporting Document.

Note: Within the document list, use the action buttons to delete a document. Documents added during the application phase can only be deleted before project is moved to Active status.

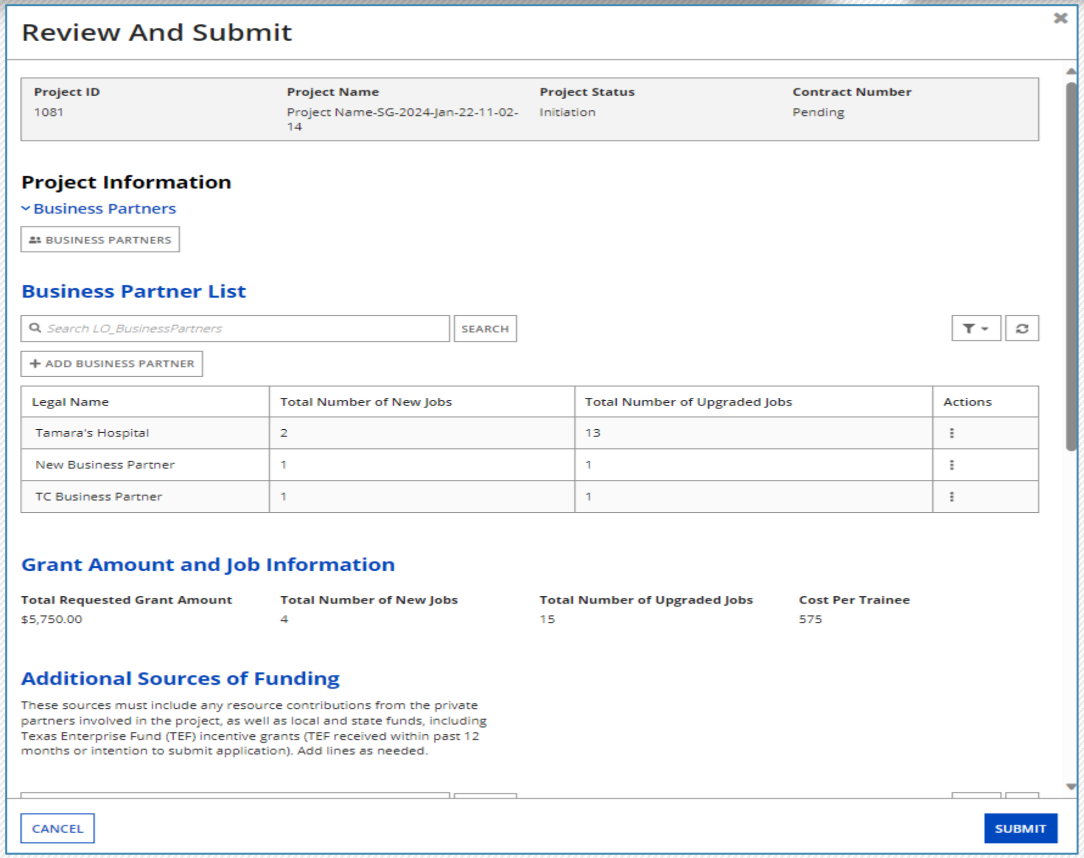
Skills Development Fund - Review and Submit Project

After entering all the required information, click the REVIEW AND SUBMIT button.

This action will navigate the user to the Review and Submit page, where each section can be expanded for a detailed view. Any necessary edits can be made directly on this page.

Final step is to provide a digital signature then click the SUBMIT button.

Grantee will receive an email indicating project has successfully been submitted and the Outreach team member will be notified as well.

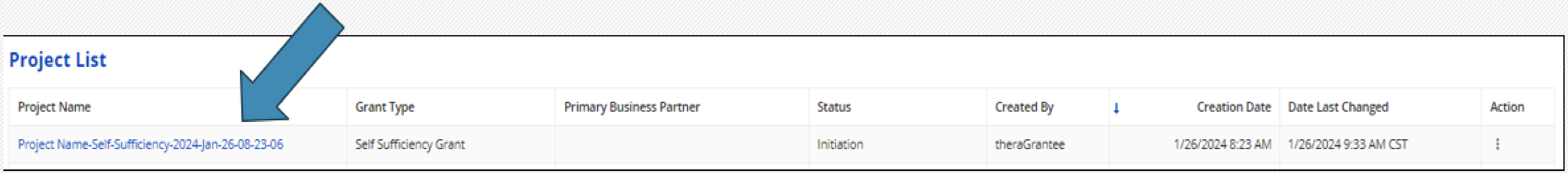


Note: An error message will appear in the instance any information for submission is missing or if any information provided does not align with grant requirements.

Skills Development Fund – Accessing and Editing Projects

After successful submission of the application, the Home page will display.

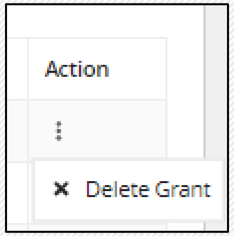
From the Home page, the newly created project will display under the Project List. Click on the name link under the Project Name column to access the project. The project's grant application page appears.



Project List

Project Name	Grant Type	Primary Business Partner	Status	Created By	Creation Date	Date Last Changed	Action
Project Name-Self-Sufficiency-2024-Jan-26-08-23-06	Self Sufficiency Grant		Initiation	theraGrantee	1/26/2024 8:23 AM	1/26/2024 9:33 AM CST	⋮

If the project needs to be deleted, click the three dots under the Action column and select Delete Grant.



Skills Development Fund – Steps After Application Submission

Once the Business Partner has signed and submitted the information in their portal, the Evaluation team will receive a notification and begin their review of that Business Partner. The application cannot be submitted until all Business Partners have been approved.

Once an application is submitted, the project status changes from Initiation to Project Development. At this time, no edits can be made to the application and the Outreach team reviews the project.

If revisions are needed to the application, the Outreach team member will change the status to Pending Revisions and will notify the grantee of the changes that are needed. In Pending Revisions status, all fields open for editing.

Once the grantee and Outreach team member are satisfied with the application, the Outreach team member will move the project to Evaluation status and the project will undergo review by the Evaluation team.

During this phase, grantees may receive a Grantee Request email in which questions may need to be answered or additional information be supplied.

After the project has been approved for funding, the project will move into Contract Development and then Active status. At this time, a Grant Manager and contract number are assigned to the project.

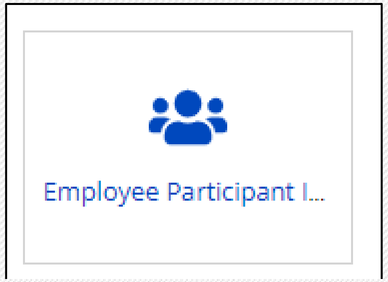
Skills Development Fund – Working with Active Grants

Use the Project List to locate an active grant. Click the project name link under the Project Name column to access the project dashboard.

Project List

Project Name	Grant Type	Primary Business Partner	Status	Created By	Creation Date	Date Last Changed	Action
Project Name-SG-2024-Jan-27-12-36-36	Skills Development Grant	AC Refrigeration	Project Development	theraGrantee	1/27/2024 12:36 PM	1/29/2024 3:04 PM CST	⋮

Notice that an Employee Participant icon now appears.



Notice that a Contract Number now appears in the top project bar.
All other icons will display application information in read only.

Skills Development Fund Application

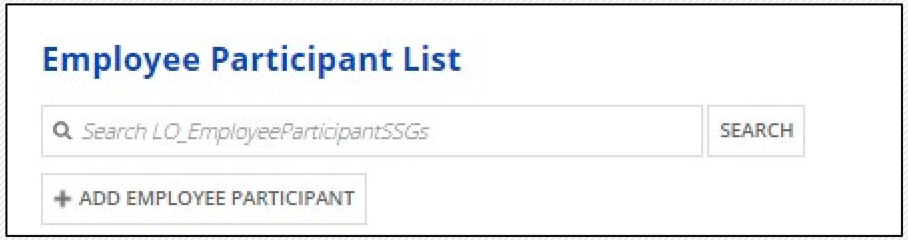
Project ID	Project Name	Project Status	Contract Number
1097	Project Name-SG-2024-Jan-27-12-36-36	Active	2823-SDF-001

Skills Development Fund – Add Employee Participant

Clicking the Employee Participant icon displays the Employee Participant Information page.

Click the ADD EMPLOYEE PARTICIPANT button to add a new participant to the project.

The Employee Participant detail page displays. All information for the employee participant should be added. Click SAVE to save the changes and add the participant to the project.

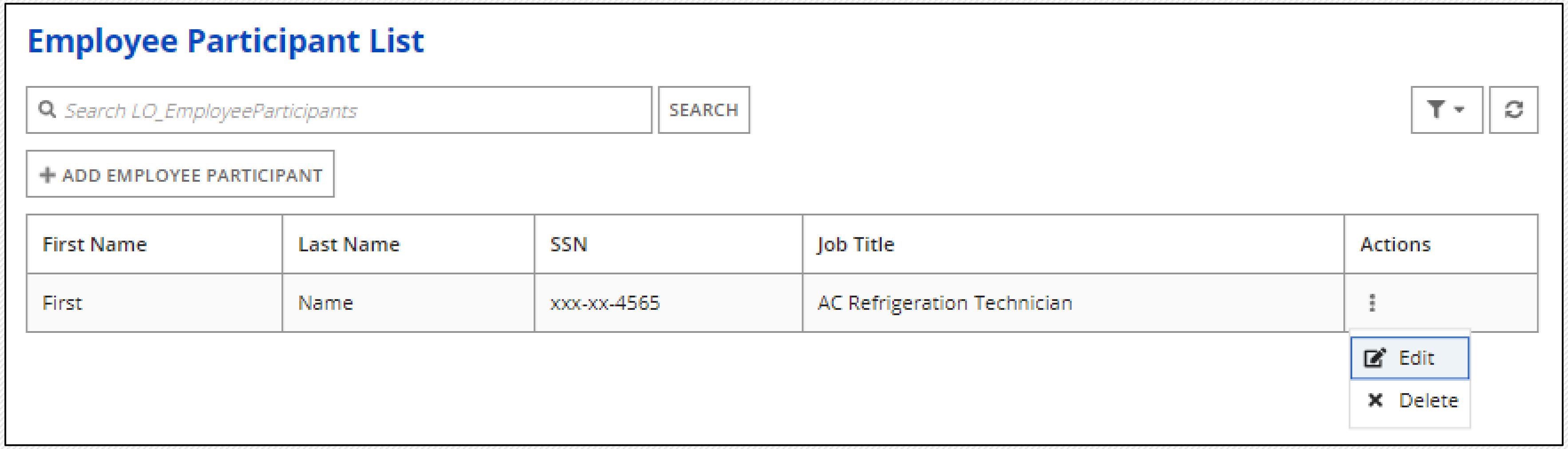


Note: A Training Information Form (TIF) upload will no longer be required as the Add Employee Participant feature allows the grantee to add trainees to the project and provides immediate feedback if aspects of the trainee’s profile do not meet grant requirements (i.e. job title, wage, course). However, a TIF upload can be used an option method to load large amounts of participant data into the system at one time.

Skills Development Fund – Edit Employee Participant

The newly added participant will now appear in the grid under the Employee Participant List. Use the search feature to locate a specific participant or view all participants in the read only grid.

Click on the three dots in the Actions column to edit the participant information or delete the participant from the project.



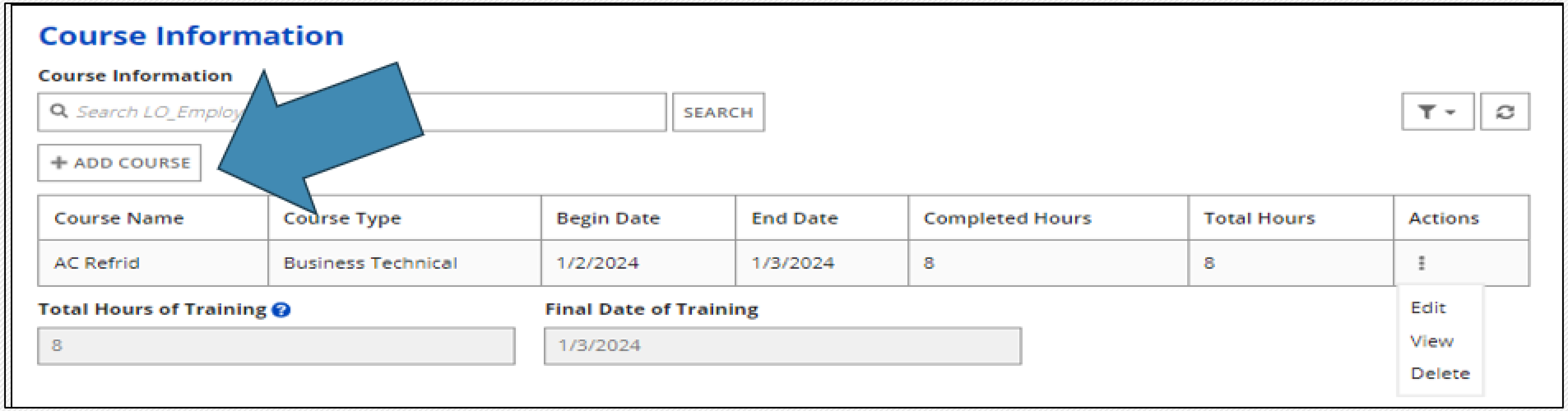
Skills Development Fund –
Add Course for Employee Participant

Locate the employee participant within the Employee Participant List. Use the actions button to select Edit which displays the Employee Participant detail page.

Scroll to the Course Information section. Click the ADD COURSE button to add a new course to that participant’s profile.

The Participant Course detail page displays, and the course information fields are open for edit. Click SAVE to save the course to the participant’s profile or click CANCEL to navigate back to the Employee Participant detail screen.

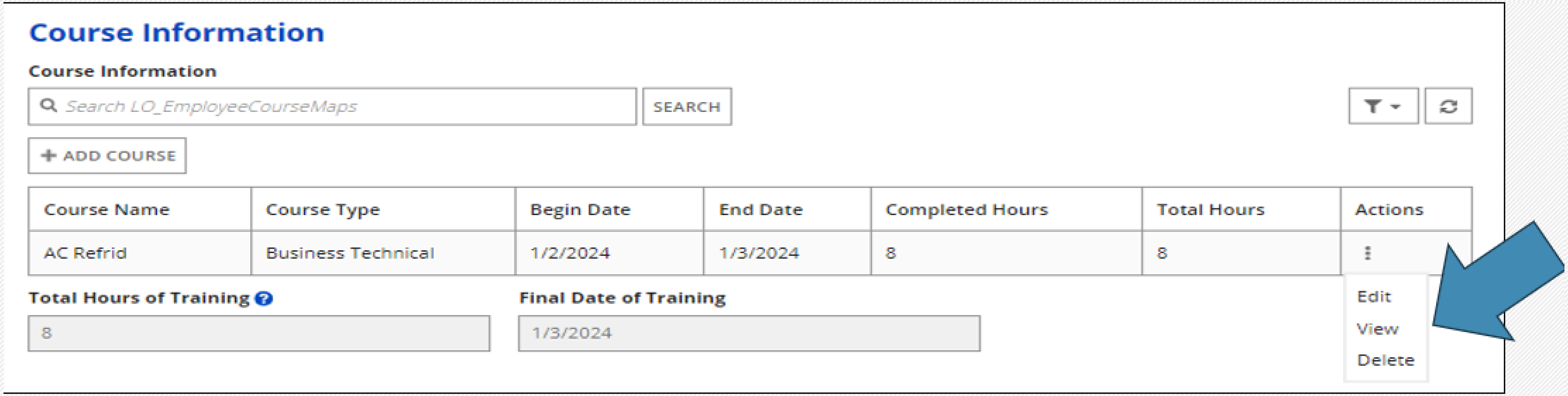
Once a course is added to the participant’s profile, it will appear in the read only grid under the Course information section.



Skills Development Fund – Additional Actions for Employee Participant Course

Use the dots under the Actions column to Edit, View, or Delete the course for a specific employee participant.

Note: A warning message does not appear for the Delete option; ensure the correct participant and course have been selected before clicking Delete.



Skills Development Fund – Closeout

The day following the last day of the grant, the project status will change to Expired. The grantee will receive an email from the LOTS system letting them know the project has moved to Expired status and they have 60 days to input or update any participant information.

After the 60 days in Expired status, the project will move to Closeout Review and all fields will be read-only. The Grant Manager will conduct a review of the project for closeout.

Once the project has been fully closed in the TWC contracting system, the Grant Manager will change the project status to Closed. Grantees will still have access to the project however, all information will display in read only.

1. Job Aid: View the related Job Aid for this course – Skills Development Fund Grants
2. Related Courses
   1. Introduction to LOTS
   2. Self-Sufficiency Fund
   3. Skills for Small Business

All training documents are available on the TWC LOTS webpage.

Wrap-up