



# Learner Outcomes Tracking System (LOTS)



## Skills Development Fund Grants

Grantee Portal  
February 2024



# Agenda

2

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

3

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



**Welcome Thera Celestine**

The Learner Outcomes Tracking System allows the user to manage the applications related to Skills Development Fund and Self Sufficiency Fund Grants.

**Skills Development Fund**

Small businesses can apply to TWC for training offered by their local community or technical college, or the Texas A&M Engineering Extension Service (TEEX). TWC processes the applications and works with the college to fund the specific courses selected by businesses for their employees.

**NEW SKILLS DEVELOPMENT**

**Self-Sufficiency Fund**

An applicant for a Self-Sufficiency Fund grant must be a public community or technical college, a community-based organization (CBO), or the Texas Engineering Extension Service (TEEX).

**NEW SELF-SUFFICIENCY**

A large blue arrow points from the right towards the 'NEW SKILLS DEVELOPMENT' button, highlighting it as the primary action.



# Skills Development Fund – Grant Application Page

4

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.

GO HOME

The screenshot shows the 'Skills Development Fund Application' page within the 'Learner Outcomes Tracking System'. At the top, a header bar displays the system name and user profile. Below this, a 'Project Information' bar contains the following data:

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

Below the project information, there are navigation links for 'Help' and 'FAQ's'. The main content area is divided into three sections:

- Project Information:** Contains four icons for 'Business Partners', 'Project Summary', 'Collaboration Informat...', and 'Project Signature'.
- Curricula and Budget:** Contains three icons for 'Training Courses', 'Equipment Purchase ...', and 'Budget Signature'.
- Other Actions:** Contains one icon for 'Supporting Document...'.

At the bottom left, there is a 'GO HOME' button, and at the bottom right, there is a 'REVIEW AND SUBMIT' button.

# Skills Development Fund – Business Partners

5

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.

**Business Partners**

Project ID	Project Name	Project Status	Contract Number
1097	Project Name 95-2024 Jan 27 12:36:36	Initiation	Pending

**Business Partner List**

Search (LT) BusinessPartners T D

**+ ADD BUSINESS PARTNER**

Legal Name	Total Number of New Jobs	Total Number of Upgraded Jobs	Actions
No items available			

**Grant Amount and Job Information**

Total Requested Grant Amount*	Total Number of New Jobs	Total Number of Upgraded Jobs	Cost Per Trainee
\$0.00			

**Additional Sources of Funding**

These sources must include any resource contributions from the private partners involved in the project, as well as local and state funds, including Texas Enterprise Fund (TEF) incentive grants (TEF received within past 12 months or intention to submit application). Add lines as needed.

Search (LT) AdditionalFunding T D

**+ ADD FUNDING SOURCE**

Funding Type	Business Partner Name	Estimate Funding Amount	Description	Actions
No items available				

**CANCEL** **SAVE**

# Skills Development Fund – Adding a Business Partner

6

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.

A screenshot of a web form titled "Business Partner". The form is divided into several sections: "General Information", "Contact Information", and "Employment Benefit Information".  
- **General Information:** Includes fields for Project ID (1007), Project Name (Project Name-SG-2026-Jan-27-12-36-36), Project Status (Initiation), and Contract Number (Pending). Below this are fields for Legal Name, Street, Apt, suite, etc., City, State, Zip Code (5 digit), and Zip Code (4 digit). There are also fields for Total Number of Employees Corporatewide and TWC Account Number.  
- **Contact Information:** Includes fields for First Name, Middle Name, Last Name, Title, Primary Phone Number, Primary Phone Extension, Secondary Phone Number, Secondary Phone Extension, Email Address, and Fax.  
- **Employment Benefit Information:** A section with a heading "Indicate which of the following employment benefits the business partner will provide for employees who participate in the proposed training." followed by a list of checkboxes: Medical Insurance, Workers' Compensation, Dental Insurance, Life Insurance, Prescriptions, Vacation, Holidays, Sick Days, Educational Assistance, 401k/Pension Plan, Profit Sharing, and Other.  
- **Buttons:** "CANCEL" and "SAVE" buttons are located at the bottom of the form.

# Skills Development Fund – Viewing an Existing Business Partner

9

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.

You must add at least one job title per business partner before your application can be submitted.

DONE

## Business Partners

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

### Business Partner List

Search LO\_BusinessPartners SEARCH

+ ADD BUSINESS PARTNER

Legal Name	Total Number of New Jobs	Total Number of Upgraded Jobs	Actions
⚠ AC Refrigeration			⋮

Job Titles are incomplete for AC Refrigeration

### Grant Amount and Job Information

Total Requested Grant Amount	Total Number of New Jobs	Total Number of Upgraded Jobs
\$0.00		

- ⚡ View Job Title
- ❓ Questionnaire
- ✍ Signature
- ✕ Delete
- ✎ Edit Business Partner
- ✉ Invite Business Partner
- ⚡ Allow Edit by Business Partner

# Skills Development Fund Invite Business Partner

8

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.

**Business Partner List**

Search LO\_BusinessPartners SEARCH

+ ADD BUSINESS PARTNER

Legal Name	Total Number of New Jobs	Total Number of Upgraded Jobs	Actions
AC Refrigeration			⋮

Job Titles are incomplete for AC Refrigeration

**Grant Amount and Job Information**

Total Requested Grant Amount	Total Number of New Jobs	Total Number of Upgraded Jobs
\$0.00		

- View Job Title
- Questionnaire
- Signature
- Delete
- Edit Business Partner
- Invite Business Partner
- Allow Edit by Business Partner

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.

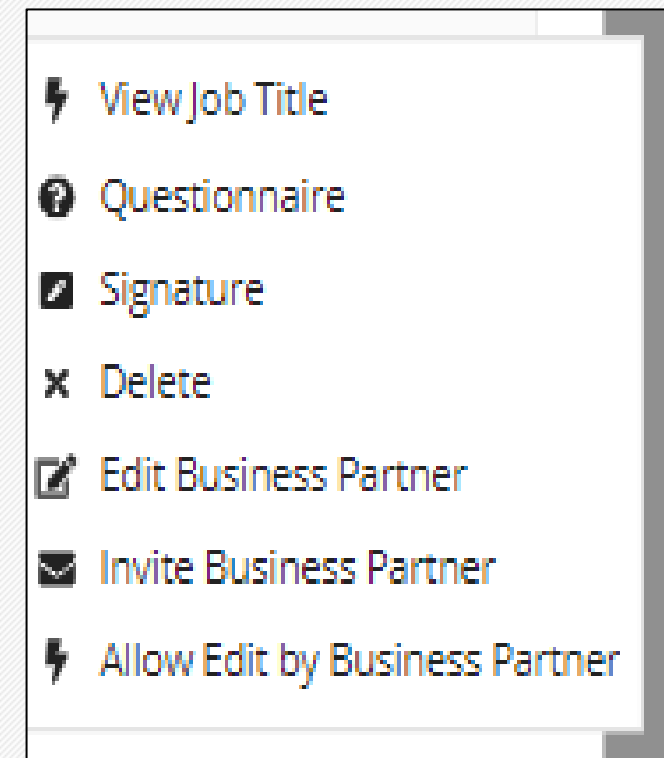


# Skills Development Fund – Adding Job Titles and Editing an Existing Business Partner

9

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

10

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

### Job Title

Application ID	Application Name	Business Partner Name
1097	Project Name-SG-2024-Jan-27-12-36-36	AC Refrigeration

Job Title \*

Industry \*

SOC Selection

by Category

by SOC Code

SOC Category \* SOC Occupational Title \*

Number of New Jobs \*

Number of Upgraded Jobs \*

Hourly Minimum Wage \*

Hourly Maximum Wage \*

Wage Increase (Percentage) \*

# Skills Development Fund- Job Title Information List

11

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.


### Job Title Information


#### Job Title Information List




Read-only Grid

Search  SEARCH Y- ↺

[+ ADD JOB TITLE](#)

Job Title	SOC Code	New Jobs	Upgraded Jobs	Hourly Minimum Wage	Hourly Maximum Wage	Wage Increase (Percentage)	Action
AC Refrigeration Technician	49-9021	5	5	18.00	37.50	1.00	



-  Edit
-  View
-  Delete

# Skills Development Fund- Additional Sources of Funding

12

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.

### Source of Funding

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

**Funding Type \***  
--- Select a Value ---

**Business Partner Name \***  
--- Select a Value ---

**Estimated Funding Amount \***

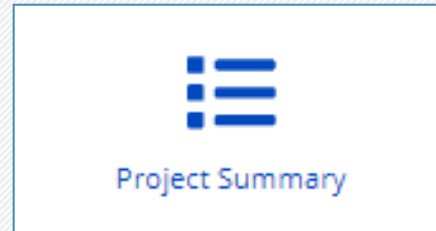
**Description \***



# Skills Development Fund – Project Summary

13

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.

**Project Summary**

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

**Proposed Project 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. Project Description: Please provide a description of the business and the training needs that have been identified for which funding has been requested. Also include why the training is needed and how the business and the community will be positively impacted after the training is complete.\***

0/8000

**B. Project Unique Circumstances (not required for new contingency contracts): Please discuss any unique circumstances that should be considered. Include justifications or waiver requests with corresponding explanations for any portion of the project that is outside of the program requirements listed in the Funding Application Overview below.\***

0/8000

**C. Collaboration with Local Workforce Development Board: Please provide a description on the collaboration for this project with the Local Workforce Development Board.\***

0/8000

CANCEL SAVE

# Skills Development Fund – Collaboration Information

14

- 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.

The screenshot shows the 'Collaboration Information' page. At the top, there is a table with columns: Project ID, Project Name, Project Status, and Contract Number. Below this is the 'Workforce Board List' section, which includes a search bar and an 'ADD BOARD' button. A table below lists board members with columns: Name of Board, First Name, Last Name, Title, and Actions. The 'ADD ECONOMIC DEVELOPMENT ENTITY' button is also visible. A second table lists economic development entities with similar columns. Blue arrows point to the 'ADD BOARD' and 'ADD ECONOMIC DEVELOPMENT ENTITY' buttons.

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

15

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.

### Project Signature

#### Acknowledgement and Assurances

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

The application is being submitted jointly with the Business Partner(s) identified in the Business Partner List in order to request funding for a customized training project under the Skills Development Fund:

The Business Partner(s) is experiencing a shortage of potential employees and/or does not have the incumbent workers it needs with the appropriate level of skills;

The applicant and Business Partner(s) collaborated to determine the skills training needs and to develop the customized curricula to address those needs;

All training will be provided within the applicant's service area or, if the training is outside the applicant's service area and the type of instruction is subject to the requirements in Chapter 4, Subchapter E of the Texas Higher Education Coordinating Board Rules, the applicant has met all requirements of the subchapter; and

The applicant will adhere to all reporting requirements, as well as the rules and regulations governing this funding, including, but not limited to Texas Administrative Code, Title 40, Part 20, Chapter 803 ([https://texreg.sos.state.tx.us/public/readtac\\$ext.ViewTAC?tac\\_view=4&ti=40&pt=20&ch=803](https://texreg.sos.state.tx.us/public/readtac$ext.ViewTAC?tac_view=4&ti=40&pt=20&ch=803)) and Texas Labor Code, Chapter 303 (<https://statutes.capitol.texas.gov/Docs/LA/htm/LA.303.htm>).

#### Digital Signature

Name *	Title *	Submission Date
<input type="text"/>	<input type="text"/>	

Draw Signature  Type Signature

Digital signature confirmation \*

I agree to sign this form digitally

# Skills Development Fund – Training Courses

16

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.

**Training Courses**

Project ID	Project Name	Project Status	Contract Number
1207	Project Name-5G-2024-jan-27-12-30-35	Initiation	Pending

**Grant Amount and Job Information**

Total Requested Grant Amount*	Total Number of New Jobs	Total Number of Upgraded Jobs	Cost Per Trainee
\$0.00	5	5	

**Training Course List**

Please list courses developed specifically for this project that have not previously been offered at this college.

Course Type Percentages

No data available

Search:  SEARCH

[ADD TRAINING COURSE](#)

Course Type	Training Provider Name	Title of Training Course	CIP Code	Number of Trainees	Total Training Hours (Per Trainee)	Total Training Hours (All Trainees)	Total Direct Program Training Costs	Cost Per Hour	Cost Per Trainee	Training Provider Type	Customized Course	Action
No items available												

**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 restricted to the applicant and cannot be used with other businesses.

[CANCEL](#) [SAVE](#)



# Skills Development Fund – Adding a Training Course

17

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.

The screenshot shows the 'Training Course' detail page. At the top, there is a header with the title 'Training Course'. Below this is a table with four columns: 'Project ID' (value: 1907), 'Project Name' (value: Project Name-GG-2024-Jan-27-13-36-30), 'Project Status' (value: Initiation), and 'Contract Number' (value: Pending). The form contains several fields with asterisks indicating they are required:

- Training Provider Name\***: A text input field.
- Training Provider Type\***: Radio buttons for 'College' and 'Vendor'.
- Course Required by Law\***: Radio buttons for 'Yes' and 'No'.
- Course Type\***: A dropdown menu.
- Title of Training Course\***: A text input field.
- CIP Selection\***: Radio buttons for 'By Title' and 'By CIP Code'.
- CIP Code\***: A text input field.
- CIP Title\***: A dropdown menu.
- Training Hours to be Received by Trainees\***: A text input field.
- Number of Trainees\***: A text input field.
- Total Training Hours\***: A text input field.
- Total Direct Program Training Costs\***: A text input field.
- Course Customized\***: Radio buttons for 'Yes' and 'No'.
- How will course be presented?\***: A dropdown menu.
- Training intended to result in industry recognized credential/certification?\***: Radio buttons for 'Yes' and 'No'.
- Participant Program of Study\***: A dropdown menu.
- Type of Training\***: A dropdown menu.
- Course Description\***: A large text area.
- Course Objectives**: A list of text input fields, each with a small 'x' icon to the right. An 'Add Objective' button is located at the bottom left of this section.

# Skills Development Fund – Viewing and Editing an Existing Training Course

18

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.

**Training Course List**  
Please list courses developed specifically for this project that have not previously been offered at this college.

**Course Type Percentages**

Course Type	Training Provider Name	Title of Training Course	CIP Code	Number of Trainees	Total Training Hours (Per Trainee)	Total Training Hours (All Trainees)	Total Direct Program Training Costs	Cost Per Hour	Cost Per Trainee	Training Provider Type	Customized Course	Action
Business Technical	College	AC Refrid	470201	10	8	80	2500	31.25	250.00	College	N	

**Training Course Questions**  
Please complete each section thoroughly by providing detailed responses that include relevant supporting information. Comprehensive answers will help evaluators as



# Skills Development Fund – Training Course Questions

19

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. \***

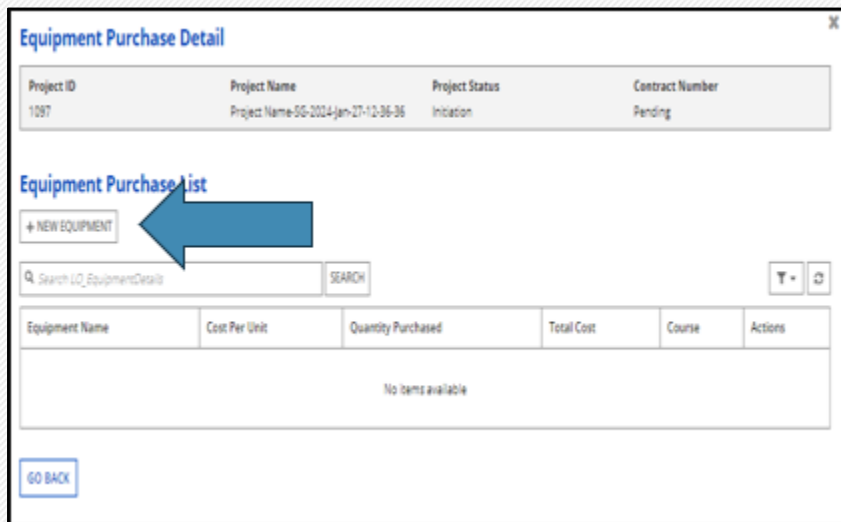
Important Note: Proprietary training is instruction the applicant cannot use with other businesses.

# Skills Development Fund – Adding Equipment

20

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



**Equipment Purchase Detail**

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

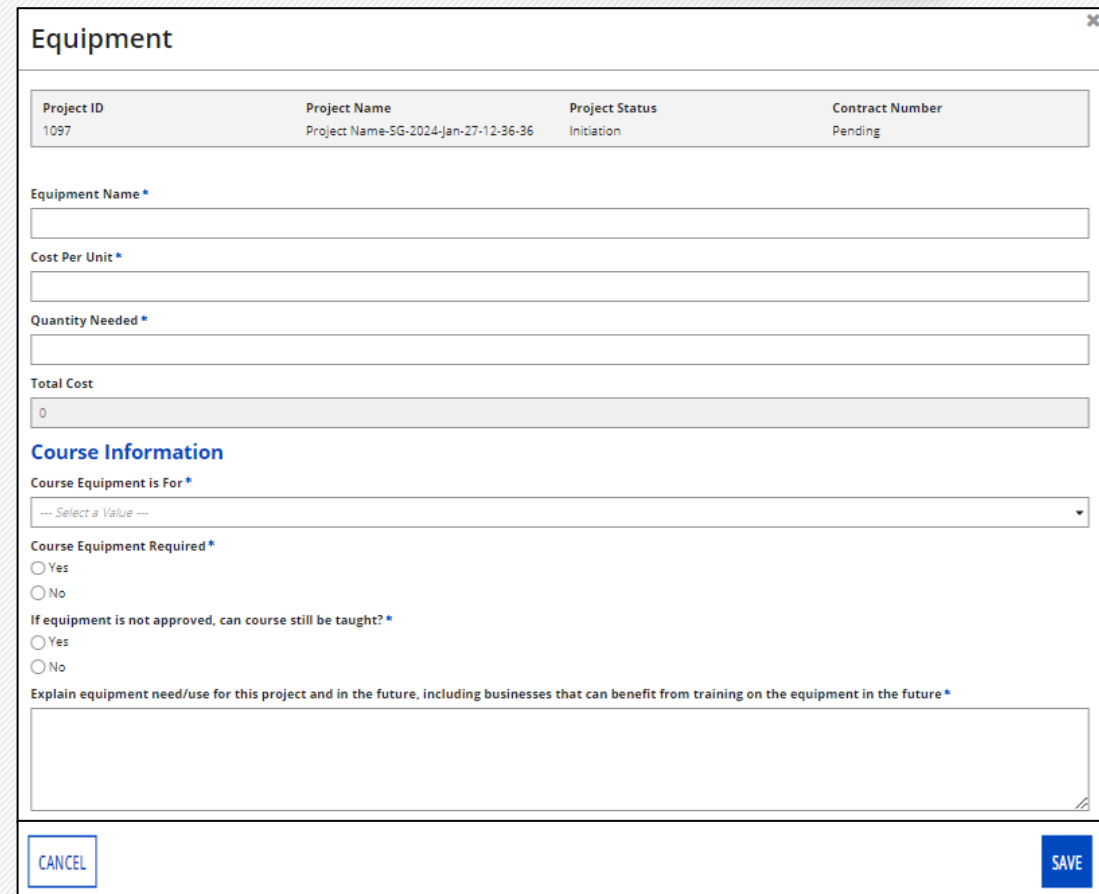
**Equipment Purchase List**

[+ NEW EQUIPMENT](#)

Search ID\_EquipmentDetails SEARCH

Equipment Name	Cost Per Unit	Quantity Purchased	Total Cost	Course	Actions
No items available					

[GO BACK](#)



**Equipment**

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

Equipment Name \*

Cost Per Unit \*

Quantity Needed \*

Total Cost

0

**Course Information**

Course Equipment is For \*

--- Select a Value ---

Course Equipment Required \*

Yes

No

If equipment is not approved, can course still be taught? \*

Yes

No

Explain equipment need/use for this project and in the future, including businesses that can benefit from training on the equipment in the future \*

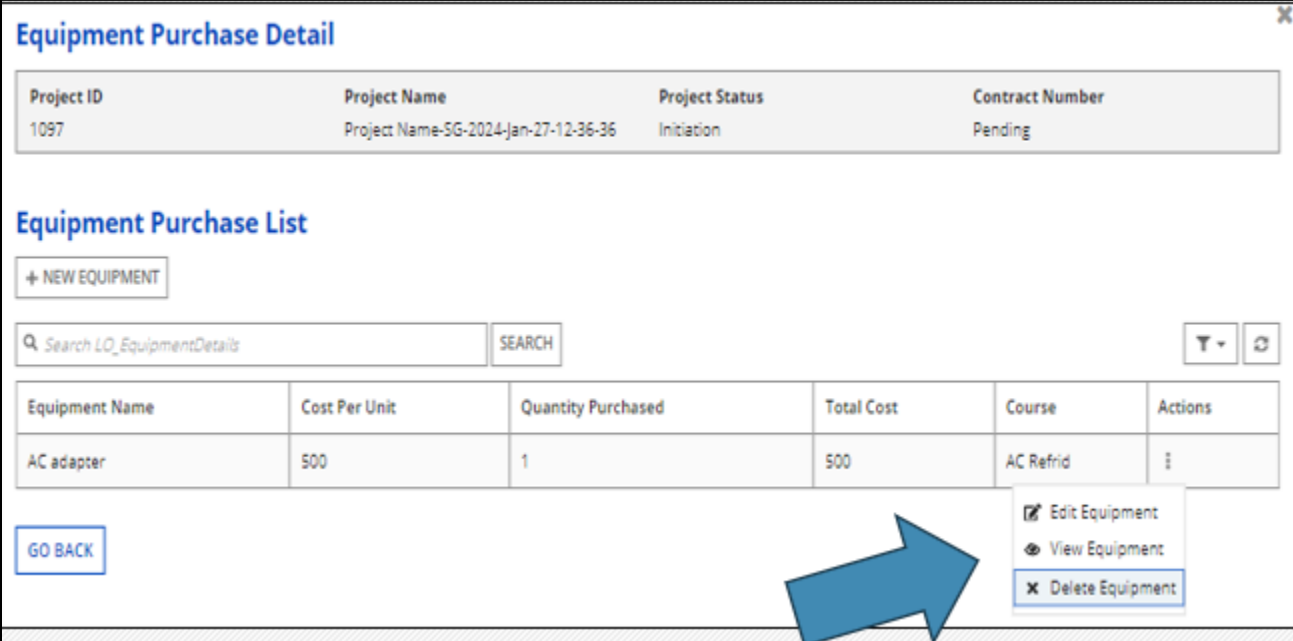
[CANCEL](#) [SAVE](#)



# Skills Development Fund – Editing Equipment

21

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.



The screenshot displays the 'Equipment Purchase Detail' page. At the top, a summary table shows project information:

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

Below this is the 'Equipment Purchase List' section, which includes a '+ NEW EQUIPMENT' button, a search bar with the placeholder 'Search LO\_EquipmentDetails', and a 'SEARCH' button. A table lists the equipment:

Equipment Name	Cost Per Unit	Quantity Purchased	Total Cost	Course	Actions
AC adapter	500	1	500	AC Refrid	⋮

A dropdown menu is open under the 'Actions' column for the 'AC adapter' row, showing three options: 'Edit Equipment', 'View Equipment', and 'Delete Equipment'. A blue arrow points to the 'Delete Equipment' option. A 'GO BACK' button is located at the bottom left of the page.

# Skills Development Fund – Budget Signature

22

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 TEEK, 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
<input type="text"/>	<input type="text"/>	

Draw Signature  Type Signature

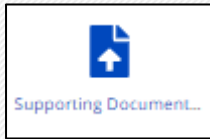
Digital signature confirmation \*

I agree to sign this form digitally

# Skills Development Fund - Supporting Documentation

23

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.

A screenshot of the "Supporting Documentation" page. It features a "Document List" section with a "Read-only Grid". Above the grid is a search bar with the placeholder text "Search in Supporting Documentation" and a "SEARCH" button. Below the search bar is an "UPLOAD FILE" button. The grid has columns for "Document Type", "Document Name", "Uploaded Date and Time", "Uploaded By", and "Actions". The grid is currently empty, displaying "No items available".

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.

A screenshot of the "Upload File" form. It includes a "Document Type\*" dropdown menu with the option "-- Select a Value --". Below this is a "File\*" field with an "UPLOAD" button and a "Drop file here" area.

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

24

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

**REVIEW AND SUBMIT**

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.

### Review And Submit

Project ID 1081	Project Name Project Name-SG-2024-Jan-22-11-02-14	Project Status Initiation	Contract Number Pending
--------------------	--	------------------------------	----------------------------

#### Project Information

Business Partners

BUSINESS PARTNERS

#### Business Partner List

Search LO\_BusinessPartners

ADD BUSINESS PARTNER

Legal Name	Total Number of New Jobs	Total Number of Upgraded Jobs	Actions
Tamara's Hospital	2	13	⋮
New Business Partner	1	1	⋮
TC Business Partner	1	1	⋮

#### Grant Amount and Job Information

Total Requested Grant Amount \$5,750.00	Total Number of New Jobs 4	Total Number of Upgraded Jobs 15	Cost Per Trainee 575
--	-------------------------------	-------------------------------------	-------------------------

#### Additional Sources of Funding

These sources must include any resource contributions from the private partners involved in the project, as well as local and state funds, including Texas Enterprise Fund (TEF) incentive grants (TEF received within past 12 months or intention to submit application). Add lines as needed.

CANCEL SUBMIT




# Skills Development Fund – Accessing and Editing Projects

25

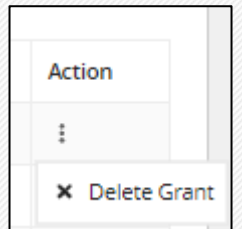
After successful submission of the application, the Home page will display.

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 Name	Grant Type	Primary Business Partner	Status	Created By	Creation Date	Date Last Changed	Action
<a href="#">Project Name-Self-Sufficiency-2024-Jan-26-08-23-06</a>	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

26

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

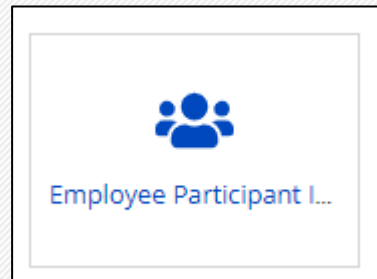
27

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
<a href="#">Project Name-SG-2024-Jan-27-12-36-36</a>	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	<a href="#">Project Name-SG-2024-Jan-27-12-36-36</a>	Active	2823-SDF-001



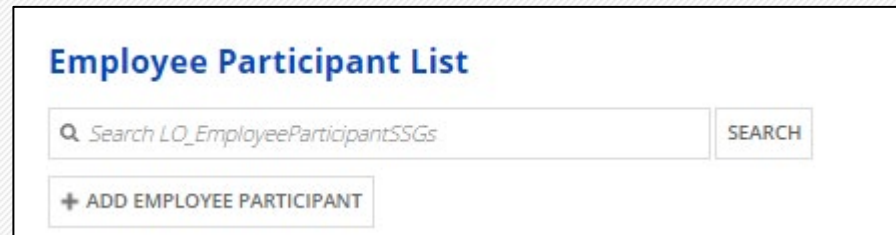
# Skills Development Fund – Add Employee Participant

28

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.



The screenshot shows a web interface titled "Employee Participant List". It features a search bar with a magnifying glass icon and the placeholder text "Search LO\_EmployeeParticipantSSGs". To the right of the search bar is a "SEARCH" button. Below the search bar is a button with a plus sign and the text "+ ADD EMPLOYEE PARTICIPANT".

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 as an option method to load large amounts of participant data into the system at one time.

# Skills Development Fund – Edit Employee Participant

29

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.

The screenshot displays the 'Employee Participant List' interface. At the top, there is a search bar with the placeholder text 'Search LO\_EmployeeParticipants' and a 'SEARCH' button. To the right of the search bar are two icons: a dropdown arrow and a refresh icon. Below the search bar is a button labeled '+ ADD EMPLOYEE PARTICIPANT'. The main part of the interface is a table with the following columns: 'First Name', 'Last Name', 'SSN', 'Job Title', and 'Actions'. The table contains one row with the following data: 'First' in the First Name column, 'Name' in the Last Name column, 'xxx-xx-4565' in the SSN column, and 'AC Refrigeration Technician' in the Job Title column. The Actions column for this row contains a vertical ellipsis icon. A dropdown menu is open below the ellipsis, showing two options: 'Edit' (with a pencil icon) and 'Delete' (with an 'x' icon).

First Name	Last Name	SSN	Job Title	Actions
First	Name	xxx-xx-4565	AC Refrigeration Technician	<ul style="list-style-type: none"><li>Edit</li><li>Delete</li></ul>



# Skills Development Fund – Add Course for Employee Participant

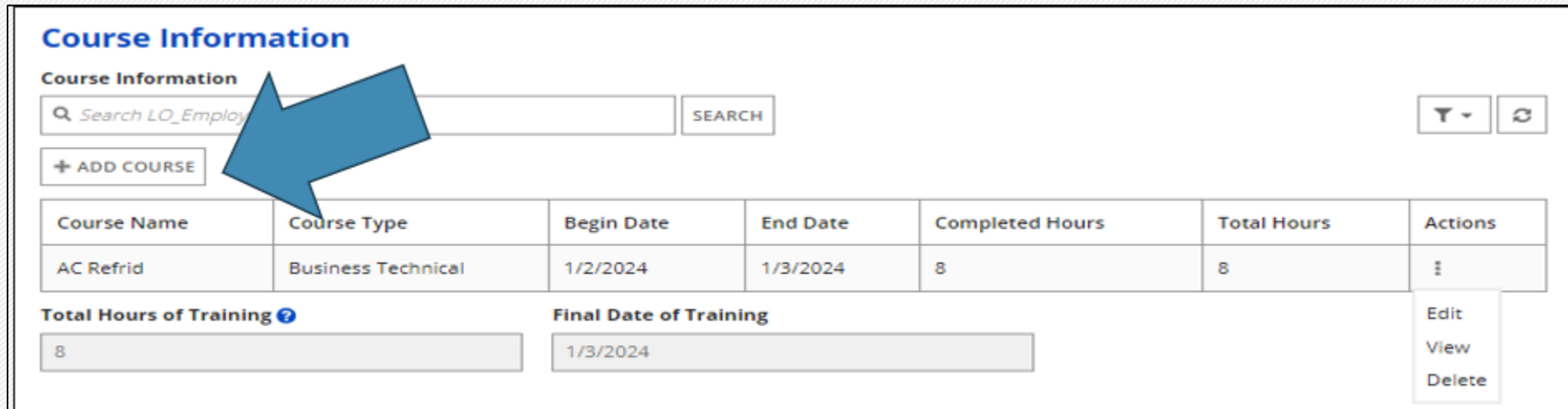
30

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.



**Course Information**

Course Information

Course Name	Course Type	Begin Date	End Date	Completed Hours	Total Hours	Actions
AC Refrid	Business Technical	1/2/2024	1/3/2024	8	8	<input type="button" value="⋮"/>

**Total Hours of Training**  **Final Date of Training**

# Skills Development Fund – Additional Actions for Employee Participant Course

31

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.


**Course Information**

Course Information

Course Name	Course Type	Begin Date	End Date	Completed Hours	Total Hours	Actions
AC Refrid	Business Technical	1/2/2024	1/3/2024	8	8	⋮

**Total Hours of Training**  **Final Date of Training**

Edit  
View  
Delete



# Skills Development Fund – Closeout

32

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

33