Recovery Act Data (RAD) System

User Guide

Division of Technology Applications
Office of Information Systems and Technology
Employment and Training Administration
United States Department of Labor
200 Constitution Avenue, N.W.
Washington, D.C. 20210

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INTRODUCTION

The American Recovery and Reinvestment Act (ARRA) High Growth and Emerging Industries (HGEI) grantees are required to submit quarterly progress reports to the U.S. Department of Labor, Employment and Training Administration (USDOL/ETA). The Recovery Act Data (RAD) System provides a vehicle that allows grantees to comply with the reporting and record keeping requirements of the grant. ARRA HGEI grantees are required to use the RAD system to collect, track, and report participant information for the purpose of generating and submitting the Quarterly Progress Report, which consists of the Quarterly Performance Report, also known as the ETA-9153 Form (submitted by all grantees except for State Labor Market Information Improvement, Green Capacity Building, Category 1 - Health Care Virtual Platform, Category 2 - Enhancing the Ability of Community- and Faith-Based Organizations to Deliver Virtual Career Exploration Services, Including Health Care Careers, and ARRA of 2009 Health Care Pilot grantees) and the Quarterly Narrative Reports (submitted by all grantees).

The RAD System User Guide provides instructions for entering participant data, generating the ETA-9153 Form, uploading the Quarterly Narrative Report, and submitting and certifying the entire Quarterly Progress Report to ETA. For technical assistance with the RAD system, grantees may contact the Applications Support Help Desk at (202)693-2682 or appsupport.ebss@dol.gov. For program related questions, grantees should contact their respective Federal Project Officer (FPO).

FREQUENTLY ASKED QUESTIONS

Updated April 2012.

How do I request technical assistance?

To request technical assistance with the RAD system, please email the Applications Support help Desk (appsupport.ebss@dol.gov). Be sure to include you grant name and number, as well as specific details regarding your request. Program related questions should be directed to your respective Federal Project Officer (FPO).

How do I edit a social security number?

To edit a participant's social security number, navigate to the participant file you wish to edit. Make the desired edits to the social security number field and click 'Save.'

I am trying to update my participant's demographic information, but the file won't save. How can I save the file?

*****Note that if you are making an edit to a file that has an old Education Level selected, you will need to update the Educational Level to one that is used on the current ETA-9153 Form. As of January 1, 2011, updates were made to the performance reporting requirements for "Education Level" and the current selection is no longer available. In order to process the request to update this page, please enter a new selection for "Education Level" and select save, or select cancel to return to the original selection (selecting cancel will not save any updates made to this page).***

If you are trying to make edits to the demographic information of a participant's file, such as updating an address, phone number or other information and the file will not save, it may be because the file has an old Education Level selected. You will need to update the Educational Level to one that is used on the current ETA-9153 Form. You will not be able to select those Education Levels that are grayed out. ***Note: As of January 1, 2011 updates were made to the performance reporting requirements for "Education Level" and the current selection is no longer available. In order to process the request to update this page, please enter a new selection for "Education Level" and select save, or select cancel to return to the original selection (selecting cancel will not save any updates made to this page).***

How do I delete a participant?

The RAD System gives the Authorized Grantee Representative/Grant Signatory and Administrators the ability to delete active participants. To delete an active participant, the appropriate user should navigate to the participant's Summary page and click on the Delete Participant link. This will begin the process to delete the participant file. Caution should be exercised since the deleted participant cannot be recovered.

Note: If a participant has already been auto-exited from the system, the file must first be reactivated before the participant file can be deleted. Only the Authorized Representative or Administrators have the ability to reactivate participants.

How do I reactivate a participant?

If a participant was auto-exited from RAD, but needs to be reactivated in order to update their participant file, Authorized Grantee Representatives and Administrators have the ability to reactivate the participant file.

To perform a reactivation, the appropriate user should navigate to the participant's Summary page and click on the Reactivate Participant link. This will begin the reactivation process. ***For more information on deleting and reactivating participants, please refer to the appropriate sections in this RAD User Guide.***

Why are participants being auto-exited?

An exiter is a participant that has gone 90 consecutive days without receiving a grant-funded service ***(Note: This does not include Retention and Follow-up Services listed in the Other Grant Funded Services tab).*** Therefore, participants are auto-exited from RAD after 90 days have passed from the end date of their latest service, regardless of whether or not they have successfully completed the program. For example, if a participant has a grant-funded service with a start date of 6/10/2010 and an end date of 8/15/2010, and no other Education/Job Training Activities or Other Grant-Funded Services are added to the participant's file, the participant would be exited automatically by RAD on the 91st day–11/13/2010. Once exited, a participant's status changes from "Active" to "Exited." The RAD auto-exit process runs daily at 2:00am EST and it identifies and exits any participants that qualify as exiters.

Can I prevent an exit in RAD?

To prevent a participant from being exited, users can do one of the following things:

- Add an Education/Job Training Activity or Other Grant-Funded Service to a participant's file before 90 days has elapsed since the end date of the participant's latest activity or service.
- Add a Gap in Service, if appropriate, to the participant file. This will put a hold for up to 180 days on a participant's status and prevents exit. ***Note: The participant must intend to return to grant-funded activities once the Gap in Service ends and must meet one of the following criteria: 1) delay before the beginning of training (e.g., a summer break); 2) health/medical reasons or family care; or 3) temporary move for the area.***

Can I change the exit reason for a participant?

If a participant is auto-exited from RAD, but meets one of the criteria for an "Exit Reason Exception," (e.g., health or medical, deceased, family care, military, institutionalized, transferred, relocated or retired), the exit reason can be changed. Grantees can select an "Exit Reason Exception" for an auto-exited participant on the *Gap in Service/Exit Reason Exception* tab in RAD, as appropriate. Once selected, a participant summary file will immediately reflect the participant's Exit Reason Exception. ***Note: Participants that meet the criteria for an exit reason exception must still first auto-exit RAD before the change can be made in their file.*** Participants with an exit reason exception reported in their files will not be included in Common Performance Measure results tracked and reported by ETA.

What if I am having trouble logging in to the RAD System? I have my RAD ID and password.

If you are experiencing issues logging in to the system with your password, please ensure you are logging in to the correct login page. Authorized Grantee Representatives/Grant Signatories have a unique login page that is specific for their account type. This page is: https://www.etareports.doleta.gov. All other users of RAD (Administrators, Area Case Managers, Case Managers, and Read-Only users) will log in to the system using this page: https://www.etareports.doleta.gov/cfdocs/grantee_prod/reporting/BRG_Green_RAD

What if I lose or forget my RAD system password?

Authorized Grantee Representatives: If you have lost or forgotten your RAD pin and/or password, please send an email to the Green Jobs Mailbox (green.jobs@dol.gov) to request that the information be resent to you. ***Note: We are only able to send this information to the Authorized Grantee Representative/Grant Signatory on file.***

The Authorized Grantee Representative or Administrators sets up **all other RAD user accounts**. If these users have lost or forgotten their passwords, they can click on the "Forgot Password" link on the main login page to reset their password. ***Note: ETA does not have access to these accounts.*** Please refer to the RAD User Guide for more information.

GETTING STARTED

User Roles

The RAD System has five user roles:

- Authorized Grantee Representative (Official Grant Recipient or Grant Signatory)
- Administrator
- Area Case Manager
- Case Manager
- Read-Only

Authorized Grantee Representative

The Authorized Grantee Representative is the official grant recipient or grant signatory. This user can create and modify other users, create and modify participants, view all users and participants, upload narrative reports, generate the ETA-9153 Form from data entered in the RAD System, and submit and certify the Quarterly Progress Reports. An Authorized Grantee Representative has access to all RAD reports, and may include participant caseload for all Administrators, Area Case Managers, and Case Managers. An Authorized Grantee Representative can transfer participants between Area Case Managers or Case Managers and can transfer Case Managers between different Area Case Managers.

Administrator

An Administrator has the same rights as an Authorized Grantee Representative, except for the ability to upload narrative reports, and submit and certify the Quarterly Progress Reports.

Area Case Manager

An Area Case Manager manages a subset of Case Managers assigned to them by the Authorized Grantee Representative or Administrator. The Area Case Manager has the same rights as an Administrator with the exception of the rights listed below:

- Area Case Managers are only able to create, view, modify, or transfer participants for themselves and Case Managers in their own domain.
- They are not able to create, view, or edit the user profiles of any other RAD System user.
- They have access to all RAD reports, but may only select criteria for their domain.

Case Manager

A Case Manager can create, view, and modify participants. Case Managers will only be able to access and manage their own participants. They cannot see other Case Managers' participants entered into the RAD system by other RAD System users. Case Managers can access all RAD reports, but may only select criteria for their participant caseload.

Read-Only

Read-Only users can view all participants, but are not able to modify any information.

Logging In to the System

This section provides instructions for logging in to the RAD System. Authorized Grantee Representatives follow the first set of instructions below, while all other users (Administrators, Area Case Managers, Case Managers, and Read-only Users) follow the second set.

Please note: The only browser supported by the RAD system is Internet Explorer 8. You may experience loss in functionality if you use a different browser, such as Google Chrome or Mozilla Firefox.

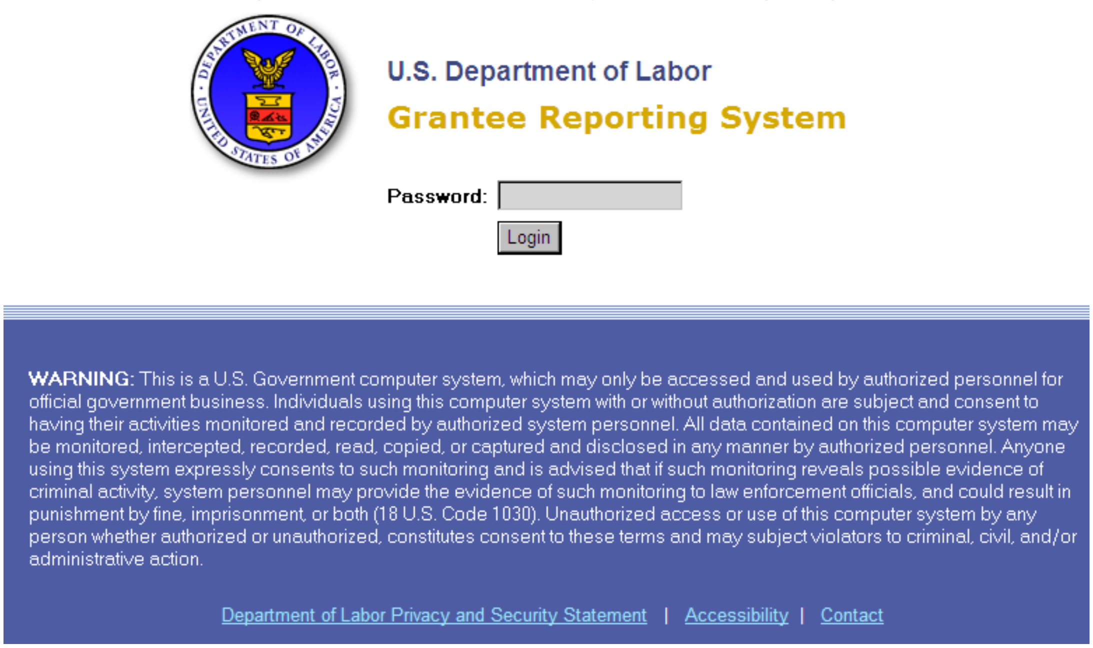
Authorized Grantee Representative

To log into RAD as an Authorized Grantee Representative, follow the steps below:

1. Open the **ETA Program Reporting** email to obtain the link to the RAD System website, grantee password, and PIN. This email is sent to the grant signatory on file and is automatically generated when the DOL/National Office creates your grant account in the RAD System. If you did not receive this email, please contact green.jobs@dol.gov to have your PIN and password resent. This information can be only be sent to the Authorized Grantee Representative.

2. Click the link to the RAD System in the email (https://www.etareports.doleta.gov). This is NOT the same login page that other RAD users access to get into the System. Please note: Authorized Grantee Representatives use a different page than other users do to log in. The login page will display as shown below (Figure 1).

Figure 1: Authorized Grantee Representative Login Page



3. Enter your password and click Login. The system displays the **RAD System Home page** (Figure 5).

4. If you forget your password, you can request to have it resent to you by emailing the Green Jobs mailbox (green.jobs@dol.gov). Please include your name, the grant name, and the grant number in the request. Please note that this information can only be sent to the Authorized Grantee Representative. After contacting the Green Jobs mailbox, you will receive an email with your password.

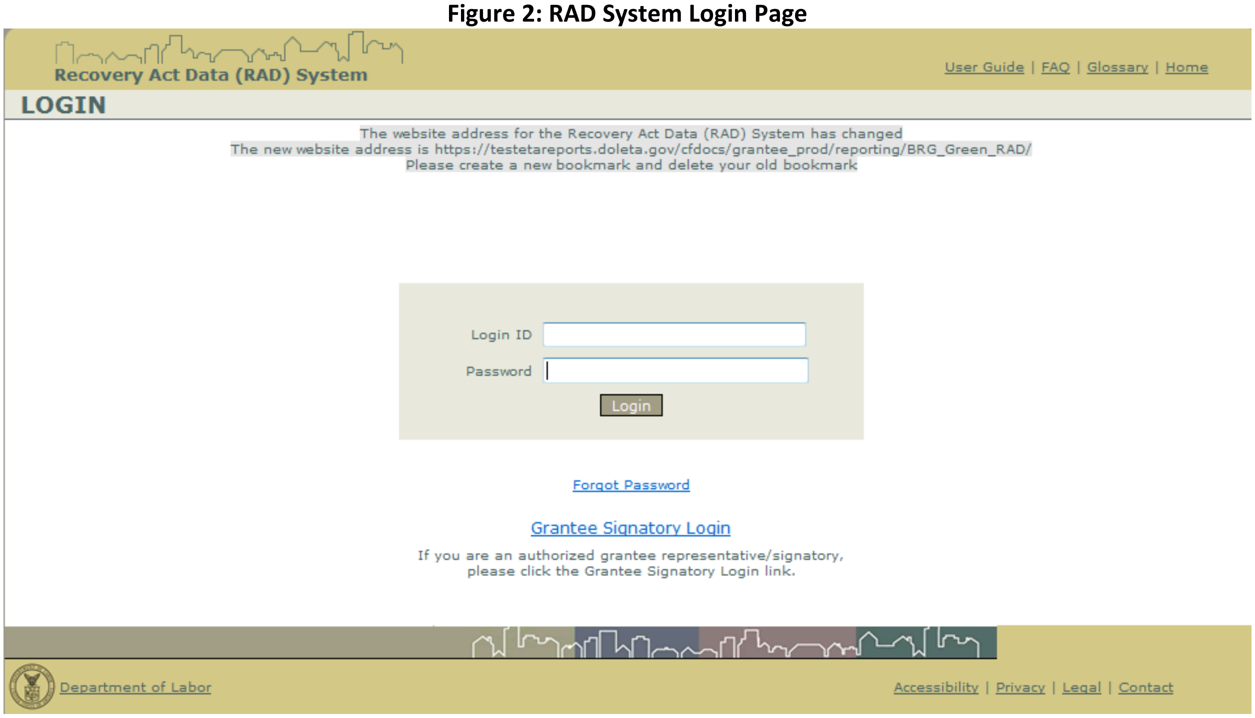
Administrators, Area Case Managers, Case Managers and Read-Only Users

This section covers logging in to RAD by Administrators, Area Case Managers, Case Managers, and Read-Only users. To log into RAD as one of these users, follow the steps below:

1. The Authorized Grantee Representative or an Administrator must create an access account for you in RAD. Once the account is created, you will receive an email from etareporting.auto-email@dol.gov that contains your login id, password, and a link to the **RAD System Login Page** (https://www.etareports.doleta.gov/cfdocs/grantee_prod/reporting/BRG_Green_RAD).

2. Click on the link to the RAD System to display the **RAD System Login page** (Figure 2):

Figure 2: RAD System Login Page



3. Enter your Login ID and Password and click Login. The system displays the RAD System Home page (Figure 5).

Forgot Password

If you are an Administrator, Area Case Manager, Case Manager, or Read-Only user and have forgotten your password, you can have it reset by following the steps below.

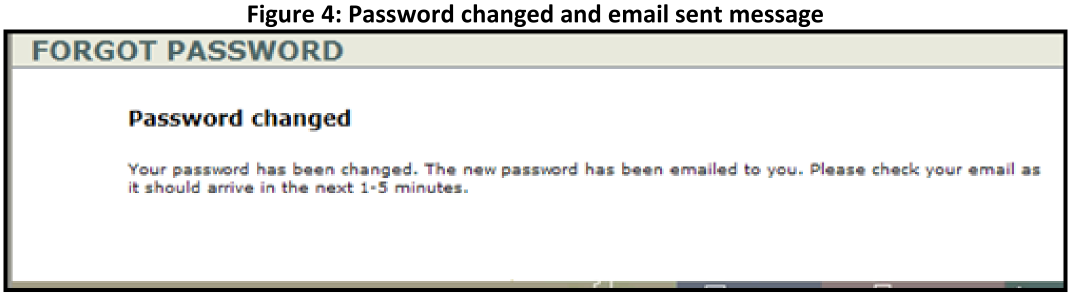
1. On the RAD System Login page, click the **Forgot Password** link (see Figure 2).

2. The system displays the **Forgot Password** page (Figure 3). Enter your Login ID and your email address. If you are not sure what these are, please contact your grant administrator, who will provide this information.

Figure 3: Forgot Password Page

3. Click **Reset Password**. The RAD system sends an email to the address in your profile and displays the following message (shown in Figure 4): "Your password has been changed. The new password has been emailed to you. Please check your email as it should arrive in the next 1-5 minutes."

Figure 4: Password changed and email sent message



Note: Administrators, Area Case Managers, and Case Managers may access their user profile and change their passwords at any time on the User Management Page. Refer to the section titled "Updating User's Profile" for more information. Read-Only users may not change their passwords.

Passwords

The RAD System was recently updated to ensure compliance with ETA IT security protocol. This update affects all users except the Authorized Grantee Representative. To comply with updated ETA security standards, all users will need to create new passwords that align with standard Federal security requirements. The standards dictate that passwords need to be a minimum of eight characters and consist of at least:

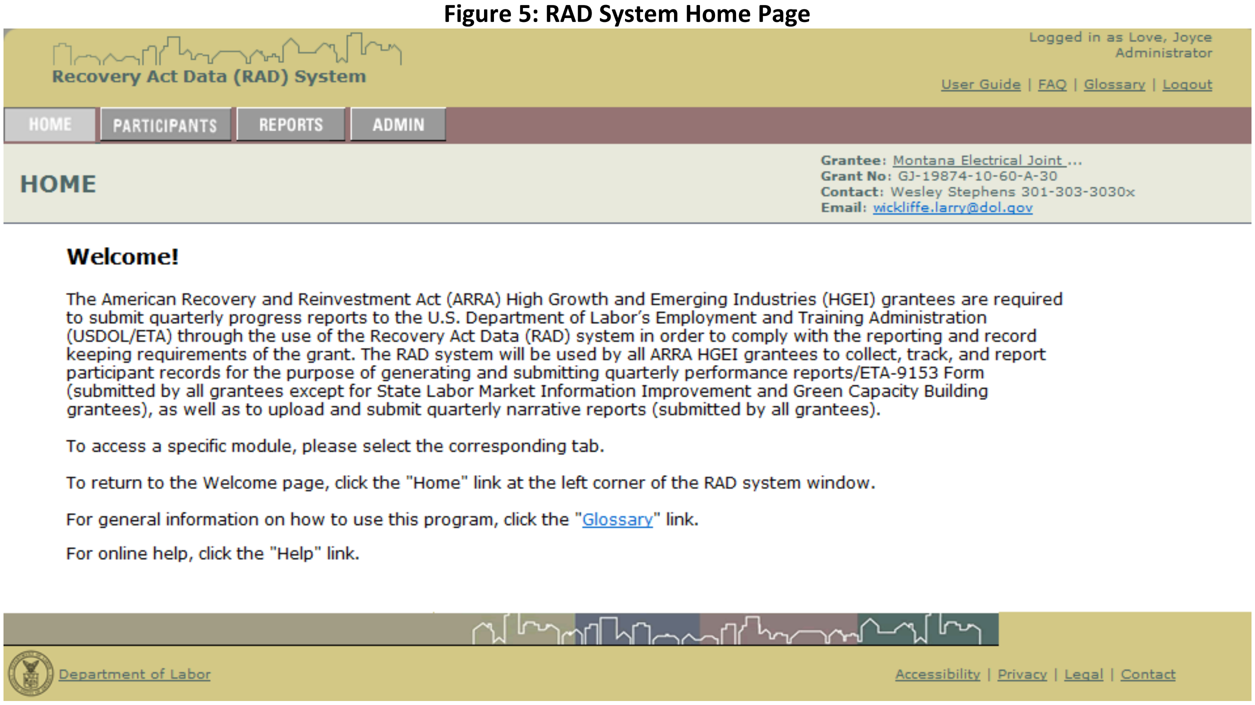
- One uppercase letter
- One lowercase letter
- One number
- One special character

The RAD System Home Page

The RAD System Home page is the entry page for RAD System users (Figure 5). It contains a brief welcome statement and the following features:

- Header Information
- Grantee Information
- Function Tabs

Figure 5: RAD System Home Page



Header Information

The header, located at the top of the page, contains several key pieces of information (Figure 6). This information appears on every page of the RAD system.

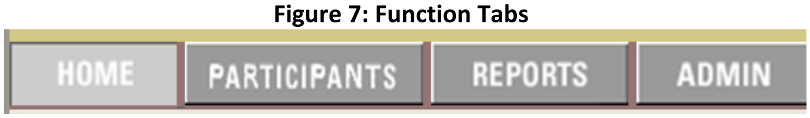
- **User Identification:** The top right corner displays the user's name and title.
- **User Guide:** Click the User Guide link to print a hard-copy document of the online help instructions.
- **FAQ:** Click the Frequently Asked Questions (FAQ) link to access the most commonly asked questions from users.
- **Glossary:** Click the Glossary link to access the ARRA HGEI Performance Reporting Glossary and Guide**.** This guide provides assistance with terminology used throughout the RAD System and outlines the performance reporting process step by step.
- **Logout:** Click the Logout link from any RAD window to log out of the System.

Figure 6: Header Information

Function Tabs

Function tabs are located on every page within the System (Figure 7). The tabs direct users to all functions within the RAD System.

Figure 7: Function Tabs



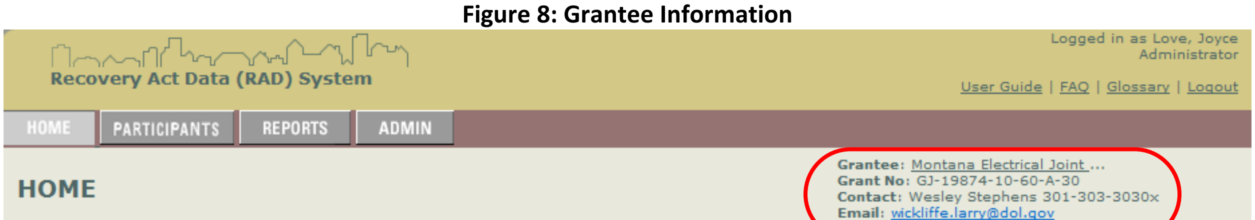
- **Home:** Select the Home tab from any location in the RAD system to access the Home page.
- **Participants:** Select the Participants tab from any location in the RAD system to access the Participants Overview page. Here, users are able to create new participant records or select a current participant record to view or edit the selected participant's information.
- **Reports:** Select the Reports tab from any location in the RAD system to access the Quarterly Progress Report and other RAD reports. Here, users can run, view, save and/or print the reports.
- **Admin:** Select the Admin (Administration) tab from any location in the RAD system to access the User Management page. Here, Authorized Grantee Representatives and Administrators can perform several administrative functions, such as creating users, modifying users, and making a user inactive or active. Area Case Managers and Case Managers can manage their own information in this tab, but not information for other users.

Grantee Information

Grantee information is located below the top right corner of the window. It consists of the grantee name, grant number, contact name, phone, and email address (Figure 8).

Check the user identification and grantee information frequently for accuracy. Grantees should report any changes or discrepancies in this information to the grantee's Federal Project Officer (FPO).

Figure 8: Grantee Information



RAD System Features

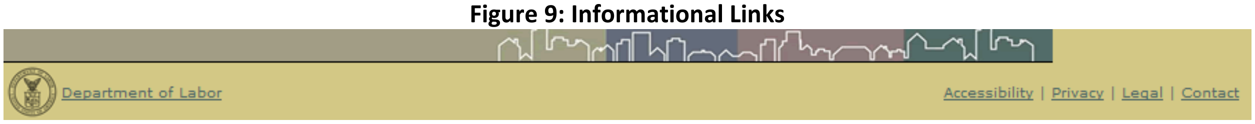
The following subsections describe the RAD system informational links, as well as the Save, Reset, and Cancel Buttons.

Informational Links

The RAD System footer, located at the bottom of every page, contains useful links (Figure 9):

- **Department of Labor:** Use this link to access the DOL Web site.
- **Accessibility:** Use this link to access information on obtaining technical support.
- **Privacy:** Use this to access information on the RAD System and DOL/ETA's privacy policy.
- **Legal:** Use this link to access information regarding the legal ramifications for misuse of the DOL/ETA RAD System Web site.
- **Contact:** Use this link to access information on obtaining technical support for the RAD System.

Figure 9: Informational Links



Save, Reset, and Cancel Buttons

All data entry windows provide the options to Save, Reset, and Cancel (Figure 10).

- Click **Save** to save information to the RAD System.
- Click **Reset** to clear data from all data entry fields and start over.
- Click **Cancel** to exit the current window and return to the previous window without saving any information.

Figure 10: Save, Reset, and Cancel Buttons

ADMINISTRATION

Admin Module

The Admin module of the RAD system allows for management of the different users in RAD. Different roles have different capabilities within the admin module.

Authorized Grantee Representatives may perform the following actions:

- View all grant users (with their role and status) in an overview list.
- Create/update accounts for Administrators, Area Case Managers, Case Managers, and Read-Only users. Authorized Grantee Representatives do not have access to their own user profiles—only the National Office Administrator can create/update the grantee's record. Contact the Green Jobs mailbox (green.jobs@dol.gov) to update or change this user profile.
- Change an Administrator, Area Case Manager, Case Manager, or Read- Only user's status to active or inactive.

Administrators have access to the same actions performed by the Authorized Grantee Representative except the following: Administrators cannot update their own statuses to active or inactive. Administrators can change their own information, including passwords, in their user profiles.

Area Case Managers and Case Managers may perform the following actions in the ADMIN tab:

- View/update their own profiles, which include name, phone, and email address
- Update their own passwords in the user profile

Read-Only users do not have access to this module. The Authorized Grantee Representative or an Administrator can make updates to Read-Only user profiles.

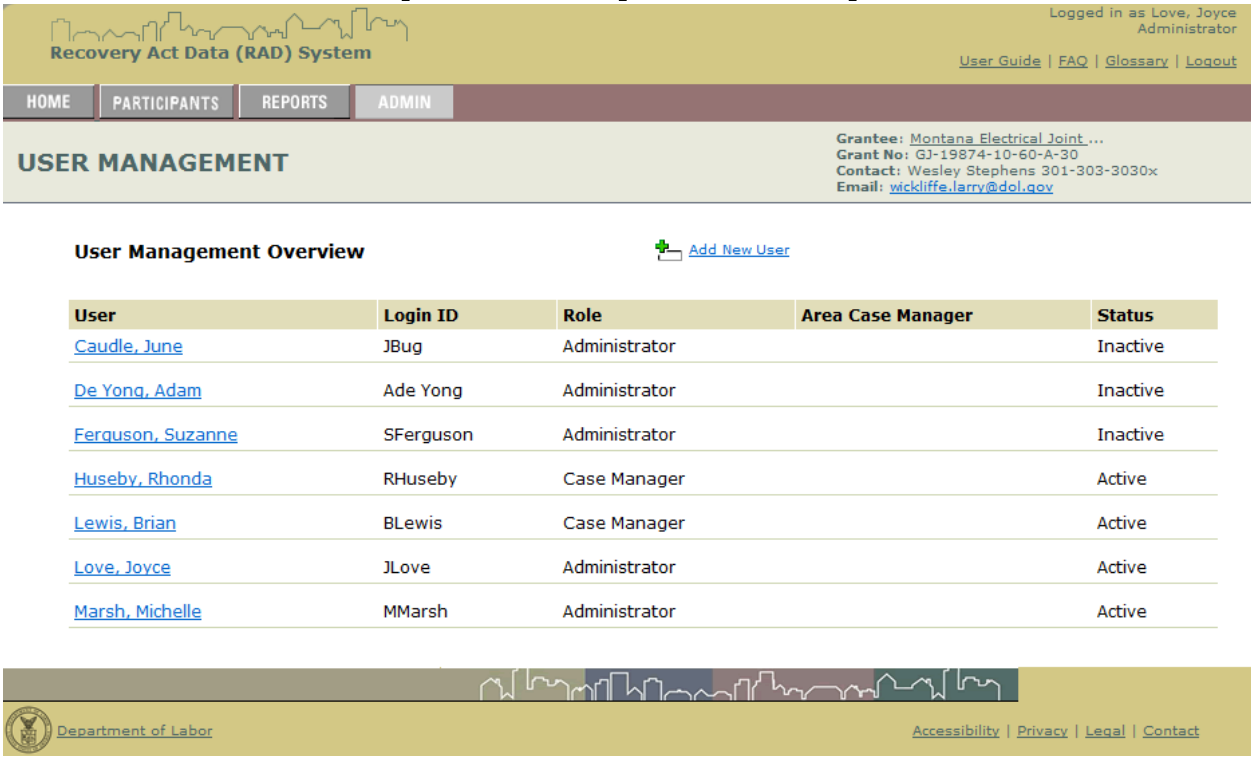
User Management Overview

Authorized Grantee Representatives and Administrators may use these steps to view a list of all RAD users. Area Case Managers and Case Managers only see a listing for themselves. Read-Only users do not have access to this module.

1. From any page in the RAD system, click on the **ADMIN tab** to display the **User Management Overview Page** (Figure 11). This page lists all RAD users added to the RAD System under the grant, along with the user's name, login ID, role, assigned Area Case Manager(s) if applicable, and status.

   Note: Area Case Managers and Case Managers will only see a listing for themselves.

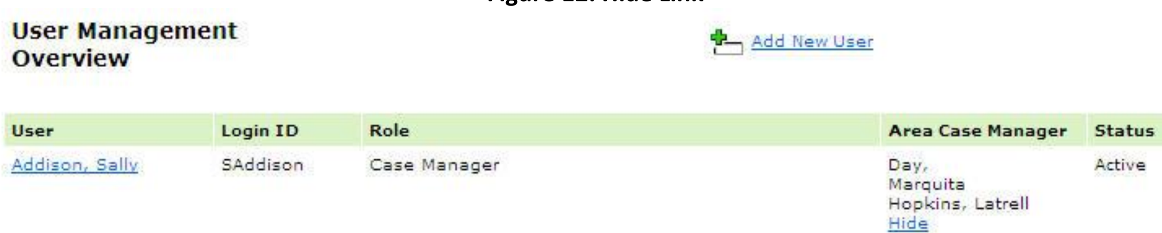
Figure 11: User Management Overview Page



User	Login ID	Role	Area Case Manager	Status
Caudle, June	JBug	Administrator		Inactive
De Yong, Adam	Ade Yong	Administrator		Inactive
Ferguson, Suzanne	SFerguson	Administrator		Inactive
Huseby, Rhonda	RHuseby	Case Manager		Active
Lewis, Brian	BLewis	Case Manager		Active
Love, Joyce	JLove	Administrator		Active
Marsh, Michelle	MMarsh	Administrator		Active

2. If a Case Manager is assigned to more than one Area Case Manager, click the **More** link under the Area Case Manager column to expand the row and display all of the Area Case Managers to which the Case Manager is assigned. Click **Hide** to close the expanded view (Figure 12).

Figure 12: Hide Link



User	Login ID	Role	Area Case Manager	Status
Addison, Sally	SAddison	Case Manager	Day, Marquita Hopkins, Latrell Hide	Active

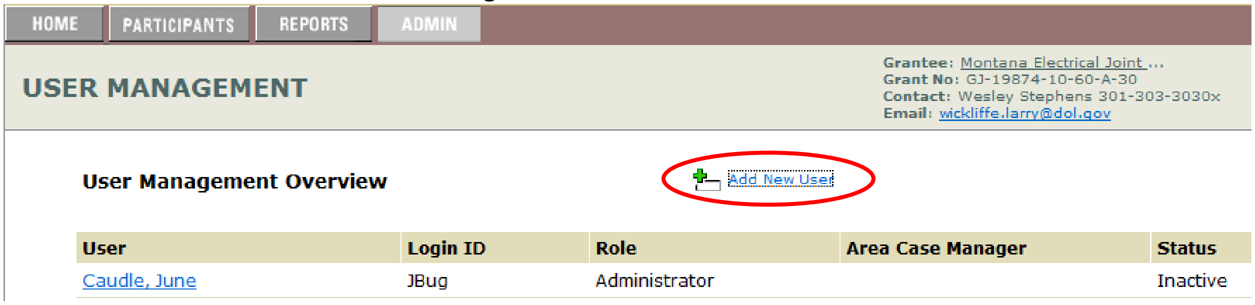
Creating New Users

The Authorized Grantee Representative or an Administrator may use the following steps to create a new user in the RAD System. Area Case Managers and Case Managers do not have access to this function.

The **Add New User** function allows Authorized Grantee Representatives or Administrators to assign existing Case Manager(s) to a new Area Case Manager. They can also to the reverse: assign existing Area Case Manager(s) to a new Case Manager (a Case Manager may have more than one Area Case Manager assigned).

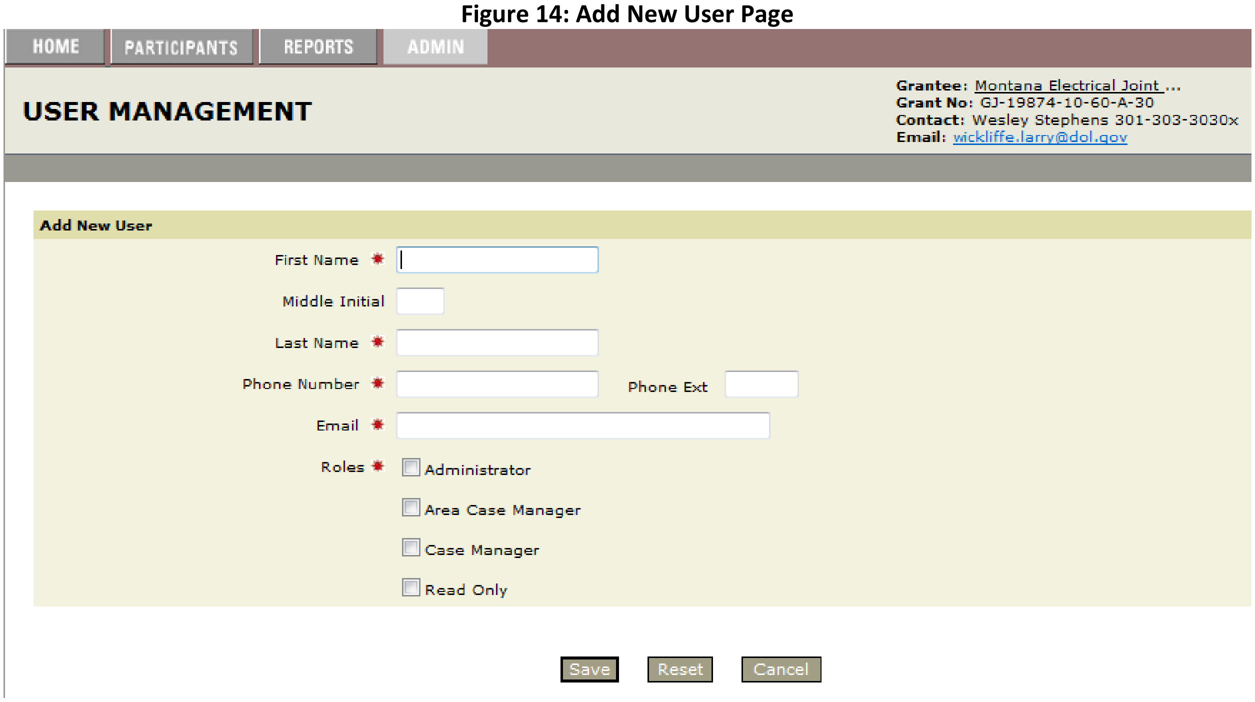
1. Click on the **Add User** hyperlink from the **User Management Overview** page (Figure 13).

Figure 13: Add New User Link



2. The system displays the Add New User page (Figure 14).

Figure 14: Add New User Page

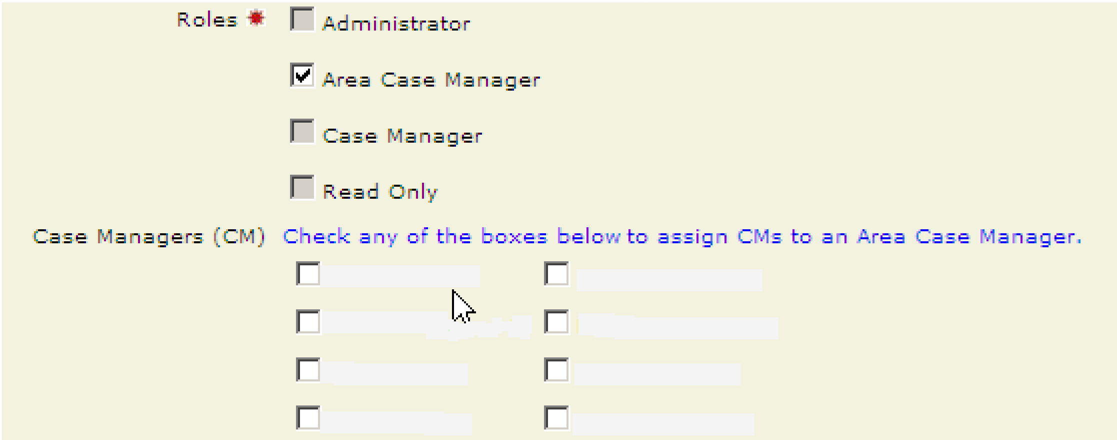


3. Enter the new user's information.

4. Select the user's role (Administrator, Area Case Manager, Case Manager, or Read-Only). To change the role selection, click the selected check box to clear it and then click the check box for the desired role.

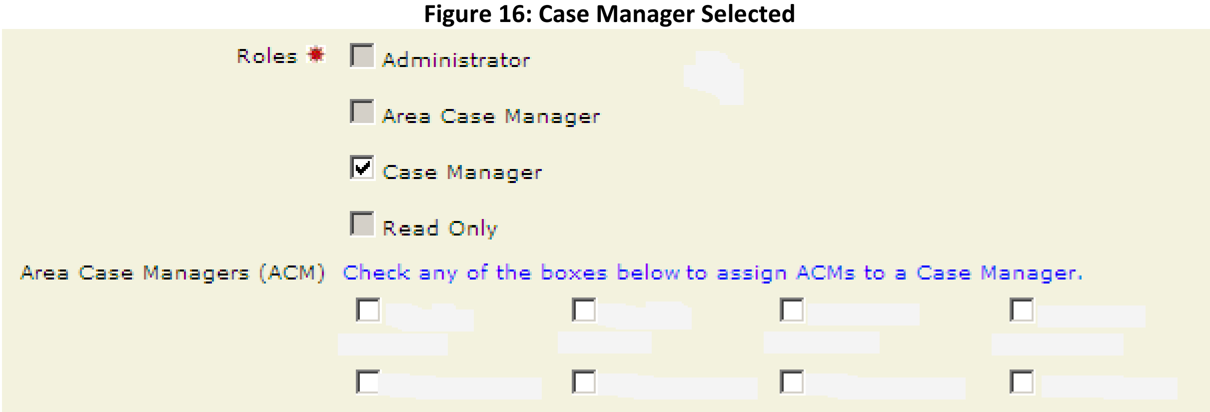
   If you select Area Case Manager as the role, the system allows you to select existing Case Manager(s) to assign to the Area Case Manager user (Figure 15).

Figure 15: Area Case Manager Selected



If you select Case Manager as the role, the System allows you to select existing Area Case Manager(s) to assign to the Case Manager user (Figure 16).

Figure 16: Case Manager Selected



5. Click **Save**. The new user will receive an email with a link to the RAD website along with their login ID and password.

Updating User Profiles

This function allows RAD System users to update their user profile.

Area Case Managers and Case Managers may only update their own profiles, including their own passwords, but not their active/inactive statuses.

The Authorized Grantee Representative and Administrator may perform the following tasks for all users:

- Update user profiles
- Update Area Case Manager and Case Manager assignments
- Update user status to active or inactive

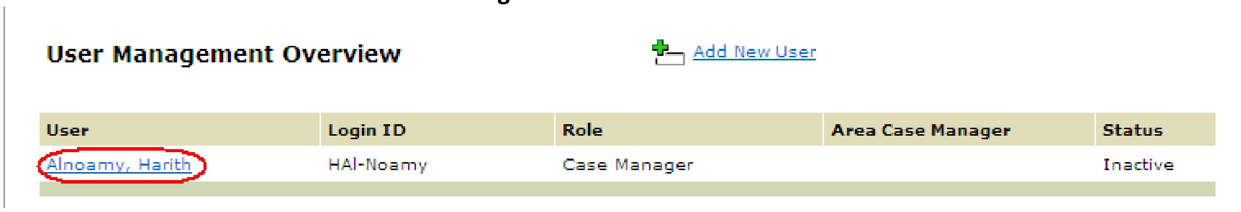
Authorized Grantee Representatives and Administrators are not able to update other user's passwords. Only the National Office Administrator can update an Authorized Grantee Representative's profile. If information in this user profile needs to be updated or changed, please contact the Green Jobs mailbox (green.jobs@dol.gov).

To update a user's profile:

1. From any page in the RAD system, click on the **ADMIN tab** to display the **User Management Overview page**.

2. Click the link for the desired user's name in the overview list (Figure 17).

Figure 17: User Name Link



User Management Overview

Add New User

User	Login ID	Role	Area Case Manager	Status
Alnoamy, Harith	HAl-Noamy	Case Manager		Inactive

3. The system displays the **Update User** page (Figure 18).

Figure 18: Update User Page

Update User

First Name * Sheria

Middle Initial

Last Name * Dixon

Phone Number * 315-475-9712 Phone Ext 1150

Email * test_sheria.dixon@use.salvationarmy.org

Roles * ☐ Administrator
☑ Area Case Manager
☐ Case Manager
☐ Read Only

Is user active? ☑ (Uncheck this box to deactivate this user)
Status: ACTIVE USER

Case Managers (CM) Check any of the boxes below to assign CMs to an Area Case Manager.
☐ Aitza Calcano ☐ Angela Cabrera
☐ Arnett Haygood-El ☐ Brenda Thornton

4. Update the desired fields.

   - To change the role selection, click the selected check box to clear it. Select the check box for the desired role.
   - If you select Area Case Manager as the role, the system allows you to select existing Case Manager(s) to assign to the Area Case Manager user (Figure 15).

- If you select Case Manager as the role, the System allows you to select existing Area Case Manager(s) to assign to the Case Manager user (Figure 16).

5. Click **Save**.

Changing Passwords

A user may change their own password after creating their profile. The exceptions to this rule are the Authorized Grantee Representative and the Read-Only user.

Authorized Grantee Representatives

Authorized Grantee Representatives can request to have their password resent to them by sending an email to the Green Jobs mailbox (green.jobs@dol.gov).

Note: Passwords can only be sent to the Authorized Grantee Representative on file.

Read-Only Users

Read-Only users should follow the instructions outlined in the section titled "Forgot Password" to obtain a new password.

Administrators, Area Case Managers, and Case Managers

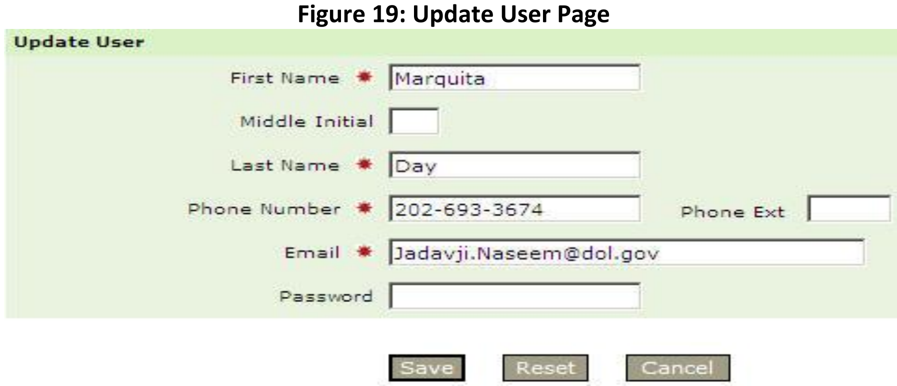
1. From any page in the RAD system, click on the **ADMIN tab** to display the **User Management Overview** page.

2. Click the link for the desired user's name in the overview list. The system displays the **Update User page** (Figure 19).

3. Enter the new password.

4. Click **Save**.

Figure 19: Update User Page



Changing Active/Inactive Status

The Authorized Grantee Representative or an Administrator may update a user's status in their profile. When a user's profile is created, the default status is set to 'active.' An Administrator may not update his own status from active or inactive. Only the Authorized Grantee Representative is able to update an Administrator's status.

1. From any page in the RAD system, click on the **ADMIN** tab to display the **User Management Overview** page.

2. Click the link for the desired user's name in the overview list. The system displays the **Update User** page (Figure 20).

3. Check or uncheck the **Is user active?** box.

4. Click **Save**.

Figure 20: Is User Active Check Box

PARTICIPANTS

This module allows RAD System users to perform the following actions:

- View Participants in an Overview List (Area Case Managers and Case Managers will see only their domain or participants)
- View Participant Summary Page
- Add New Participant
- Update Participant
- Delete Participant
- Reactivate Participant
- Reassign Participants
- Add/Update Program Information
- Add/Update Education or Job Training Activities
- Delete Education or Job Training Activities
- Add/Update Other Grant-Funded Services
- Delete Other Grant-Funded Services
- Add/Update Employment and Follow-up Information
- Add/Update Gap in Service and Exit Reason Exception

Read-only users will only be able to view participant records. They will not have the ability to change any information. Area Case Managers will only have access to participants in their domain and Case Managers will only have access to participants assigned to them.

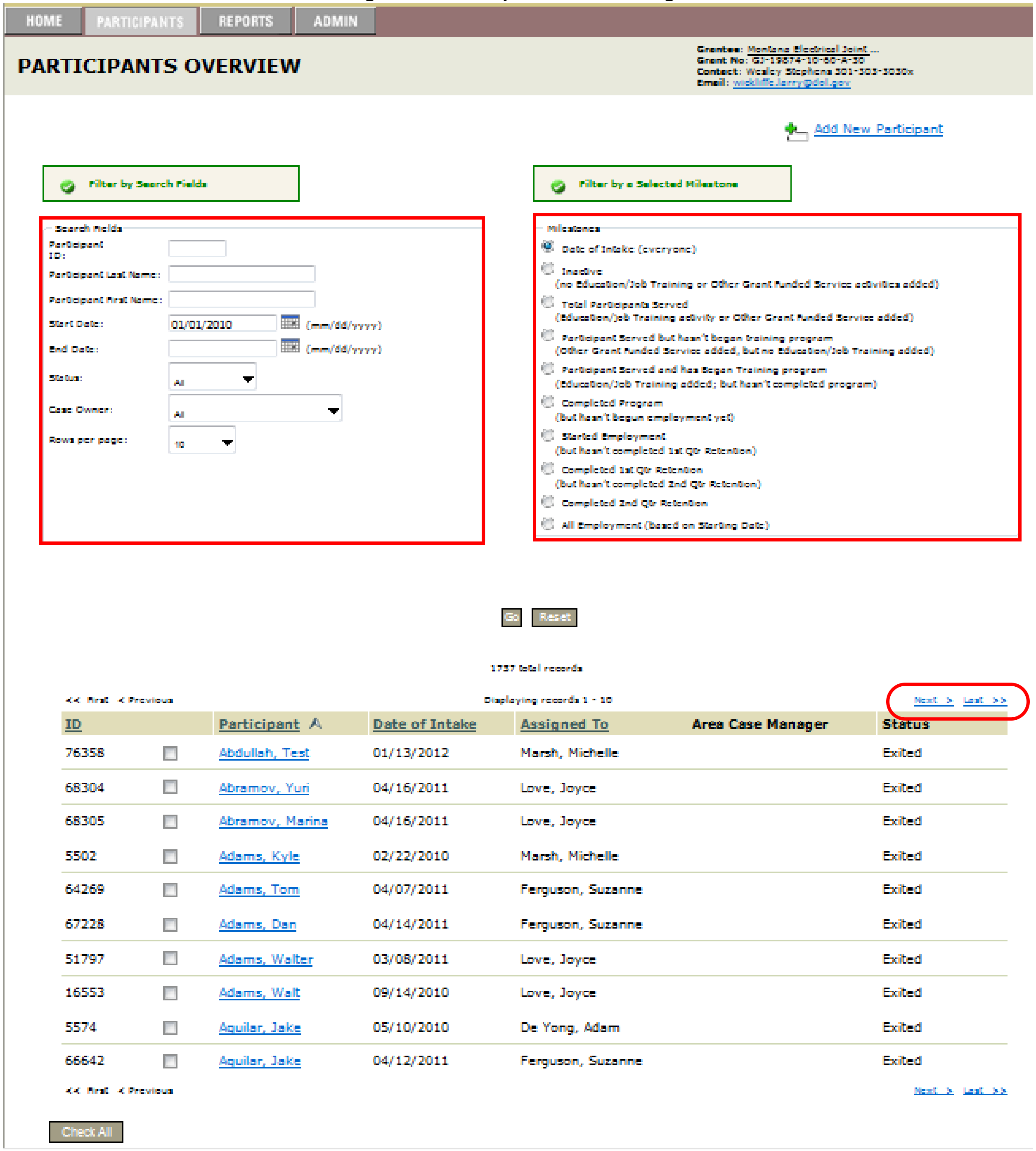
Participants Overview Page

The Participants Overview Page will list all the participants entered into RAD for your grant program. Authorized Grantee Representatives, Administrators, and Read-only users will be able to view all participants entered into the RAD system for the grant. Area Case Managers will only be able to view the participants for their domain/Case Managers, and Case Managers will only be able to view their own caseload.

Use these steps to view a list of participants.

1. From any page in the RAD system, click on the **PARTICIPANTS** tab to display the **Participants Overview page** (Figure 21).

Figure 21: Participant Overview Page



2. You have various options to view, or search for participants by using the Search Fields box (Figure 21). You can use the search box to search for a specific participant using the Participant ID, Participant Last Name, Participant First Name, Case Owner, and Status. You can also select the number of participants that you want to display per page. You can also search participant files by the following additional filters:

- Selected milestones
  - Date of Intake (everyone)
  - Inactive (no Education/Job Training or Other Grant Funded Service activities added)
  - Total Participants Served (Education/job Training activity or Other Grant Funded Service added)
  - Participant Served but hasn't began training program (Other Grant Funded Service added, but no Education/Job Training added)
  - Participant Served and Began Training program (Education/Job Training added; but hasn't completed program**)**
  - Completed Program (but hasn't begun employment yet)
  - Started Employment (but hasn't completed 1st Qtr Retention)
  - Completed 1st Qtr Retention (but hasn't completed 2nd Qtr Retention)
  - Completed 2nd Qtr Retention
  - All Employment (based on Starting Date)
- Date ranges (default start date is 01/01/2010)
- Updated participant status (inactive, active, and exited)
  - Previously, only "Active" and "Exited" status types were displayed for participants entered in RAD. A new participant status type, "Inactive," has been added so grantees can easily identify and sort participant files by active participants, exited participants, and inactive participants. **Note:** "Inactive" status refers to participant files entered into RAD where no grant-funded services (education/training activities or other grant-funded services) have been added to trigger an "Active" status to track the individual's participation in the grant program.

3. This page displays all grant participants added to the RAD system, along with their summary information.

4. You can also use the **Next** and **Last** hyperlinks to move to the next page of participants.

5. If a participant's Case Manager is assigned to more than one Area Case Manager, you can click the **More** link under the Area Case Manager column to expand the row and display all of the Area Case Managers to which the Case Manager is assigned (see Figure 22).

Figure 22: Participant More Link

6. Click the **Hide** link to close the expanded view (Figure 23).

Figure 23: Hide Link

Participant Summary Page

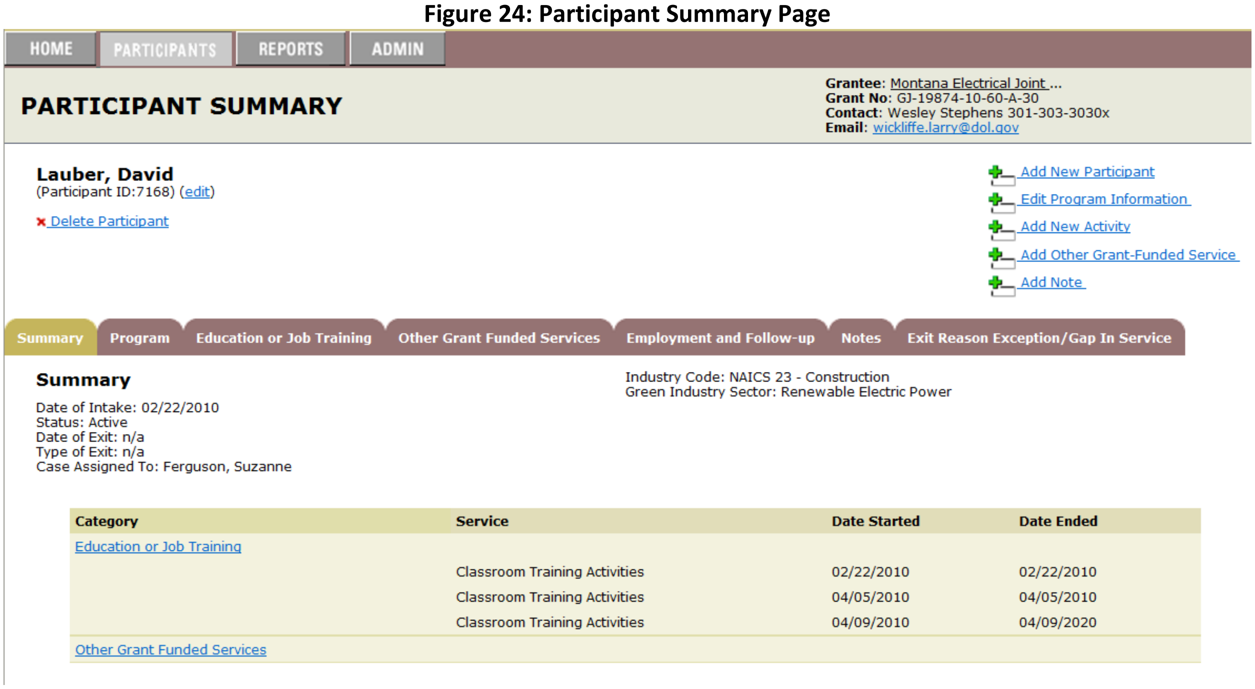
1. From any page in the RAD system, click on the **PARTICIPANTS** tab to display the **Participants Overview page**.

2. Click on the name of the participant whose summary you want to view. The system displays the **Participant Summary page** of that participant (Figure 24).

3. From the Participant Summary page, you have the option of performing several different tasks. Subsequent sections of this User Guide will provide detailed functions of the following tasks:

   - Add/Update Participant Information
   - Delete Participant
   - Reactivate Participant
   - Reassign Participant
   - Add/Update Program Information
   - Add/Update an Education Job Training Activity
   - Add/Update an Other Grant-Funded Service
   - Delete an Education or Job Training Activity or an Other Grant-Funded Service
   - Add Employment and Follow-up Retention Information
   - Add/Update Gap In Service Information and Add Exit Reason Exception
   - Add Notes to a participant's file

Figure 24: Participant Summary Page

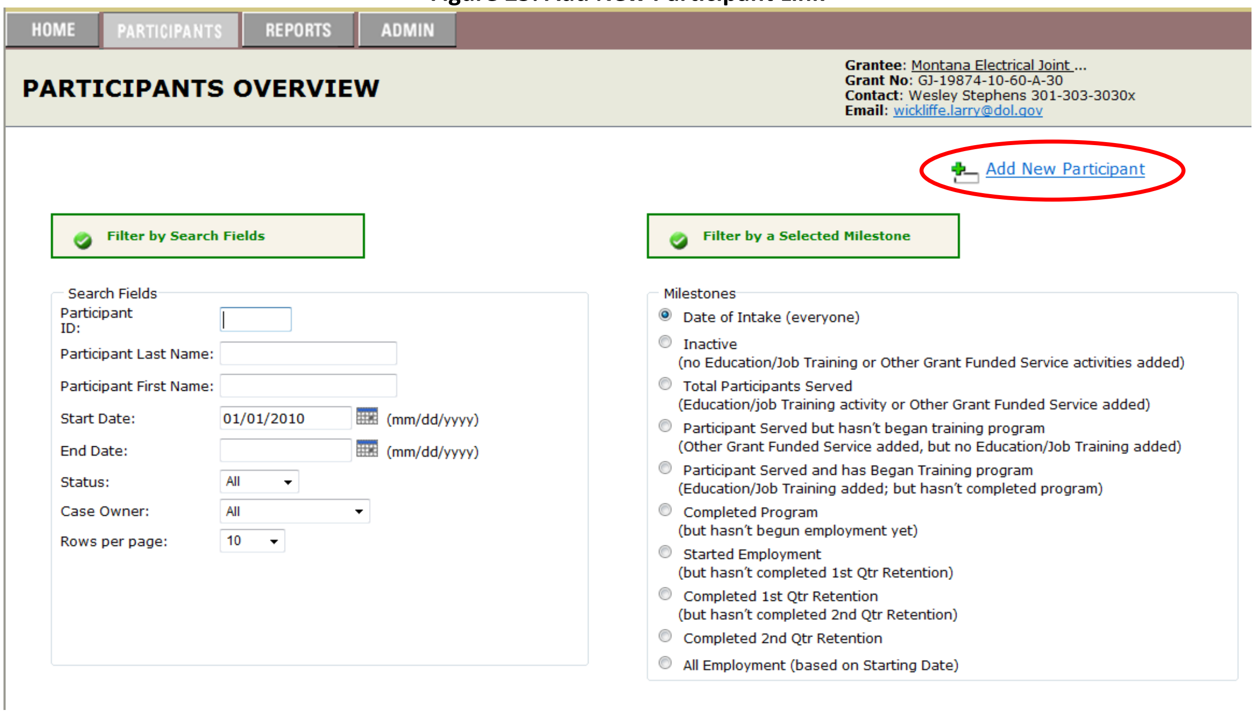


Add New Participant

1. From anywhere in the RAD system, click on the **PARTICIPANTS** tab to display the **Participants Overview page** (Figure 25).

2. Click the **Add New Participant** link (Figure 25) to display the **Add New Participant window** (Figure 26).

Figure 25: Add New Participant Link

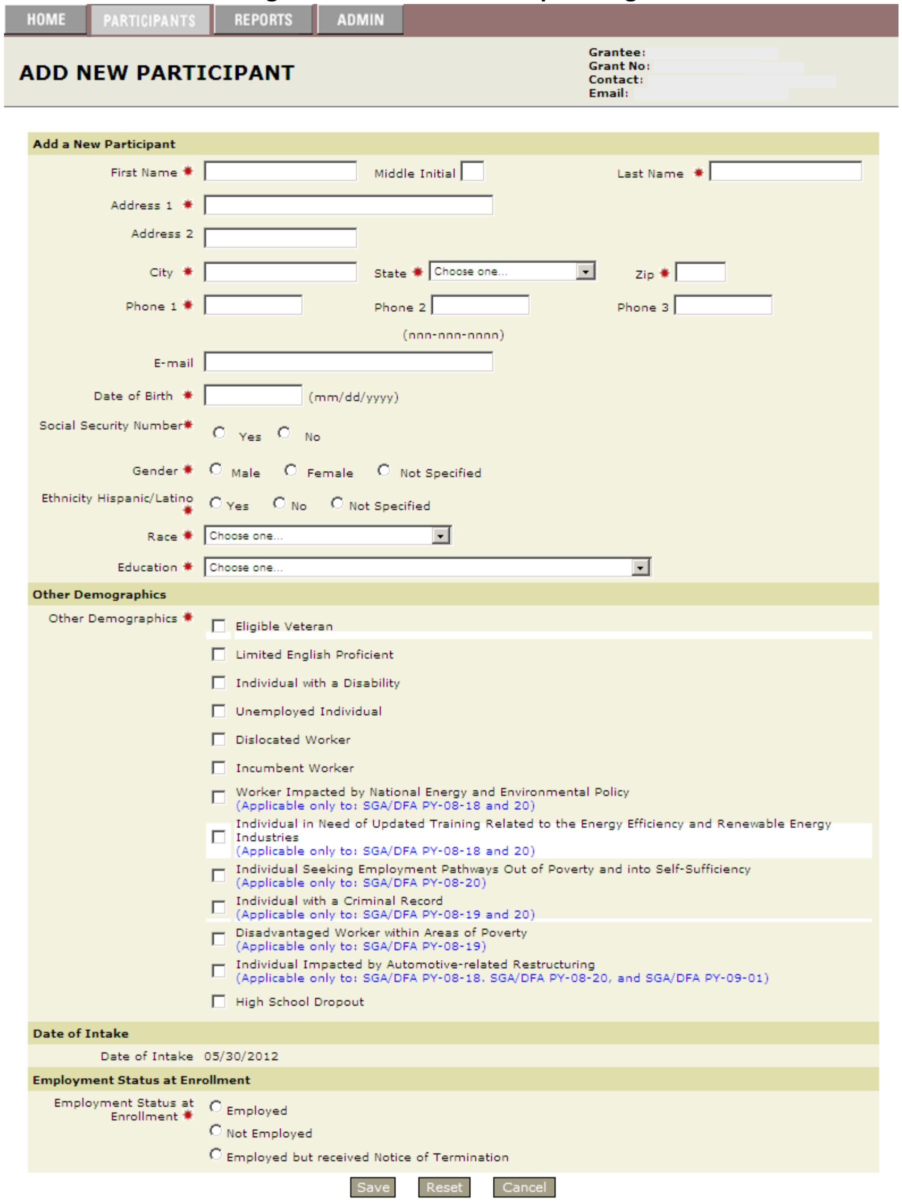


3. Enter the participant's information (Figure 26). The red asterisk (*) indicates a required field. If a specific format is required for a field, the system displays it next to or below the field.

   Note: Simply entering the demographic information of a participant does not trigger participant count. To count a participant on the ETA-9153 Form, the participant file **should include a grant-funded service.** You must enter an education/job training activity or other grant-funded service in order for your participant to be reported as a participant served (i.e., become "active").

   Note: For details or definitions of a specific field (or data element), click the **Glossary** link in the top right corner of the RAD System. The system will display the **Performance Reporting Glossary and Guide.**

Figure 26: Add New Participant Page



Social Security Number (SSN) Policy Requirements

All ARRA HGEI training grantees are required to collect Social Security Numbers (SSNs) for all participants served with grant funds and report to ETA in RAD (Figure 27).

Figure 27: Social Security Number Field with Nothing Selected

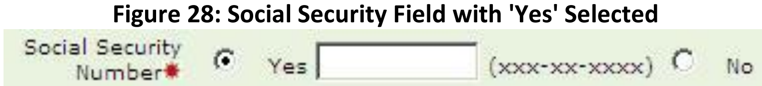
Note: Grant-funded services cannot be denied to individuals because of failure to disclose an SSN. This requirement is included in the OMB-approved reporting package (ARRA HGEI Reporting Handbook), as well the latest performance reporting FAQ, and can be accessed at:

- *ARRA HGEI Reporting Handbook*: http://doleta.gov/performance/reporting/pdf/ARRA_HGEI_Handbook.pdf
- *Performance and Reporting FAQ #1*: https://pathways.workforce3one.org/view/2001124256857071479
- *Guidebook for Performance Reporting ARRA HGEI & GJIF (April 2012)* https://pathways.workforce3one.org/view/2001211853475119210/info

Adding a Social Security Number

Select **Yes** in the Social Security Number field to display an additional field for entering the participant's social security number (see Figure 28). Social Security Numbers are encrypted (xxx-xx-xxxx) in RAD for security purposes and the actual SSN is blocked from view once a file is saved.

Figure 28: Social Security Field with 'Yes' Selected



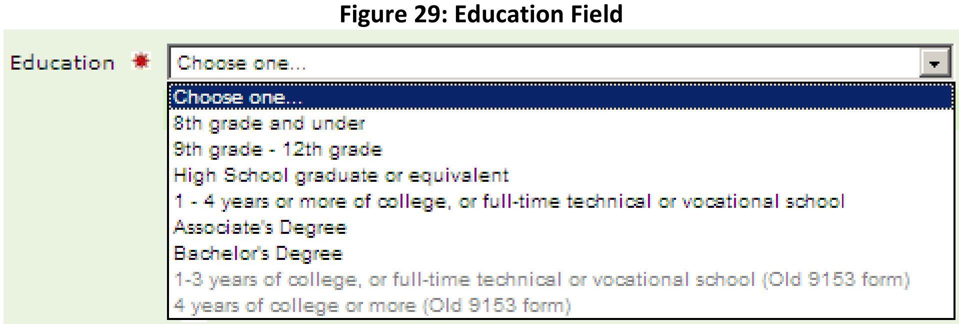
Editing Participant Social Security Number

To edit a participant's social security number, navigate to the participant file that you wish to edit. Make the desired edits to the social security number field and click **Save**.

Education Field

Select the participant's level of education in the Education field (Figure 29).

Figure 29: Education Field



The system displays two options of education categories. The selections that are inactive are from an older version of the ETA-9153 Form (1-*3 years of college or full-time technical or vocational school* and *4 years of college or more*). These options are inactive and RAD users cannot select them as an option. Although these options are no longer used, they are displayed because they were used with the previous ETA-9153 Form (used by ARRA HGEI grantees) and may have been selected for those participant records.

NOTE: If you are making edits to a participant file that has an old Education Level selected, you will need to update the Educational Level to one of the selections on the current ETA-9153 Form. In order to process the request to update this page, please enter a new selection for "Education Level" and select save, or select cancel to return to the original selection (selecting cancel will not save any updates made to this page). Not updating the Education Field will result in an error message, unless you select cancel to return to the original selection.

Other Demographics Fields

The section titled 'Other Demographics' (shown in Figure 30) is a required field. The demographics in this section are what determine an individual's eligibility in the grant program. There are several demographic selections, which only apply to specific SGAs:

- Worker Impacted by National Energy and Environmental Policy—Applies to Energy Training Partnership (ETP) and State Energy Sector Partnership (SESP) grants only
- Individual in Need of Updated Training Related to the Energy Efficiency and Renewable Energy Industries—Applies to ETP and SESP grants only
- Individual Seeking Employment Pathways Out of Poverty and into Self-Sufficiency—Applies to SESP grants only
- Individuals with a Criminal Record—Applies to Pathways Out of Poverty (Pathways) and SESP grants only
- Disadvantaged Worker within Areas of Poverty—Applies to Pathways grants only
- Individual Impacted by Automotive-related Restructuring—Applies to ETP, SESP, and Health Care and Other High Growth and Emerging grants only

These elements are determinants of eligibility for the ARRA HGEI grants and a participant should have at least one of the appropriate demographics selected in their file, as it aligns with their grant type and Statement of Work.

Figure 30: Other Demographics

Other Demographics

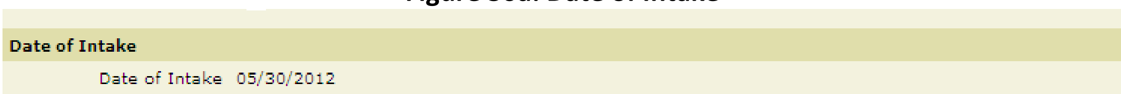
Other Demographics *

- Eligible Veteran
- Limited English Proficient
- Individual with a Disability
- Unemployed Individual
- Dislocated Worker
- Incumbent Worker
- Worker Impacted by National Energy and Environmental Policy (Applicable only to: SGA/DFA PY-08-18 and 20)
- Individual in Need of Updated Training Related to the Energy Efficiency and Renewable Energy Industries (Applicable only to: SGA/DFA PY-08-18 and 20)
- Individual Seeking Employment Pathways Out of Poverty and into Self-Sufficiency (Applicable only to: SGA/DFA PY-08-20)
- Individual with a Criminal Record (Applicable only to: SGA/DFA PY-08-19 and 20)
- Disadvantaged Worker within Areas of Poverty (Applicable only to: SGA/DFA PY-08-19)
- Individual Impacted by Automotive-related Restructuring (Applicable only to: SGA/DFA PY-08-18, SGA/DFA PY-08-20, and SGA/DFA PY-09-01)
- High School Dropout

Date of Intake

The Date of Intake is the date when the participant file is created in RAD (Figure 30a). This date has no ties to any of the other dates in the system (i.e. Date of Intake is not Date of Participation). Therefore, if the participant has activity dates that are earlier than the Date of Intake, grantees are still able to input these activities. The RAD System automatically populates the Date of Intake based on the date the file was created in RAD; the grantee **cannot** manually update this field. Click **Save** once all required information is entered into the participant file.

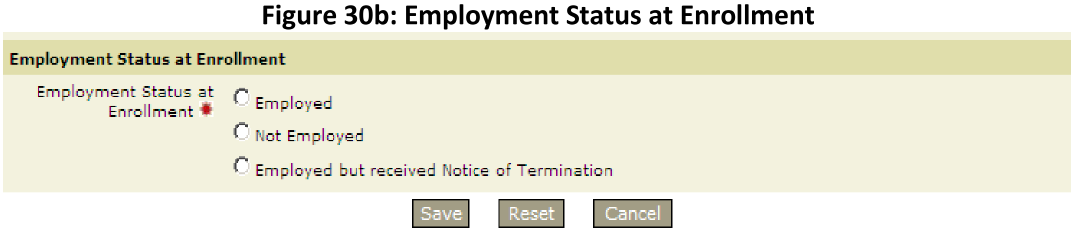
Figure 30a: Date of Intake



Employment Status at Enrollment

Grantees are required to report the Employment Status of each participant at the time of enrollment in order for ETA to track and calculate Common Performance measures (Figure 30b).

Figure 30b: Employment Status at Enrollment



Common performance measures (which are the standard ETA Common Measures) are exit-based, meaning the tracking of these employment-based outcomes begin after a participant has exited the program. Common performance measures include: entered employment rate; employment retention rate; and, average earnings. Common Performance Measures are separate from, and in addition to, real- time outcomes reported by grantees in RAD.

It is important to note that grantees are required to collect Social Security Numbers (SSNs) for all participants served with grant funds, for the purposes of ETA tracking and reporting common performance measures. Grantees do NOT report individual participant outcomes on the common performance measures; in RAD, specific data elements (SSN, date of exit, employment status at participation, and exit reason) are tracked for participants, and ETA calculates these measures on behalf of the grantee. Further, grantees cannot track common performance measures through the use of supplemental data. Please note, grant-funded services cannot be denied to individuals because of failure to disclose an SSN.

ETA will calculate these common performance measures on behalf of the grantee for all participants served with grant funds and provide common performance measure outcome results to grantees, once calculated. ETA will work with its state partners to match SSNs with employment data available from state Unemployment Insurance (UI) and other administrative wage records (e.g., Federal and Military employment).

Update Participant Demographic Information

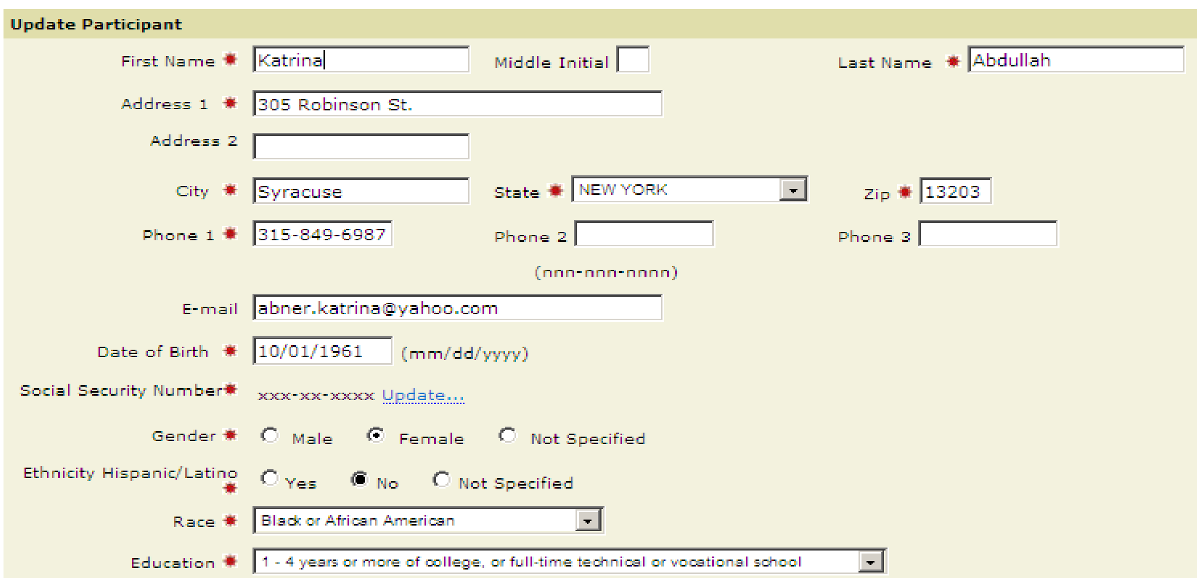
1. To update a participant's demographic information, click on the desired participant's name on the **Participants Overview** page. The system displays the **Participant Summary page**.

2. Click edit next to the participant's name located on the top left corner (Figure 31).

Figure 31: Edit Link on the Participant Summary Page

3. The system displays the **Update Participant page** (Figure 32).

Figure 32: Update Participant Page



4. Enter the updates to the participant record and click **Save**.

Delete Participant

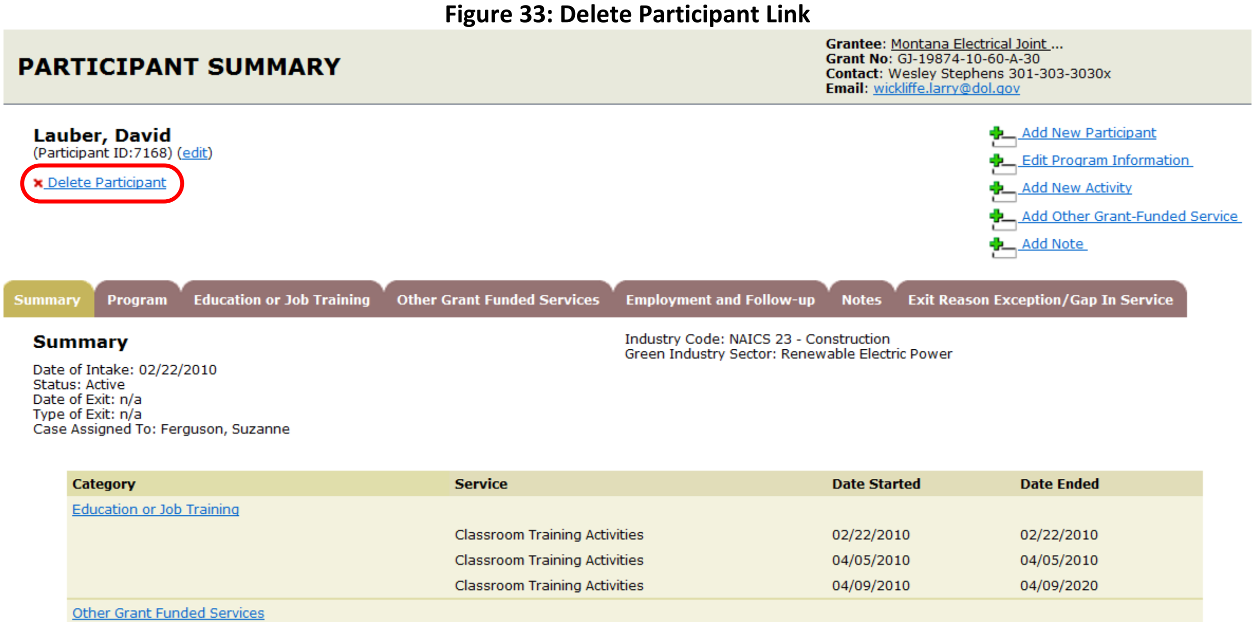
This function allows the Authorized Grantee Representative and Administrators to delete a participant with an active status from the RAD System. Case Managers cannot delete participant files. Deleting a participant also deletes all related participant information.

Note: Once you complete the delete option, the entire participant file is deleted from the RAD System and **data cannot be restored**. Please ensure that any impacted Quarterly Progress Reports are recertified and resubmitted, if appropriate. However, to ensure the ETA-9153 Form is calculated correctly, recertify and resubmit the Quarterly Progress Reports the day after participant records have been deleted or reactivated, allowing reactivated participants to be auto-exited if appropriate.

1. To delete a participant record, click on the name of the participant from the **Participants Overview page.** The system displays the **Participant Summary page** of the selected participant.

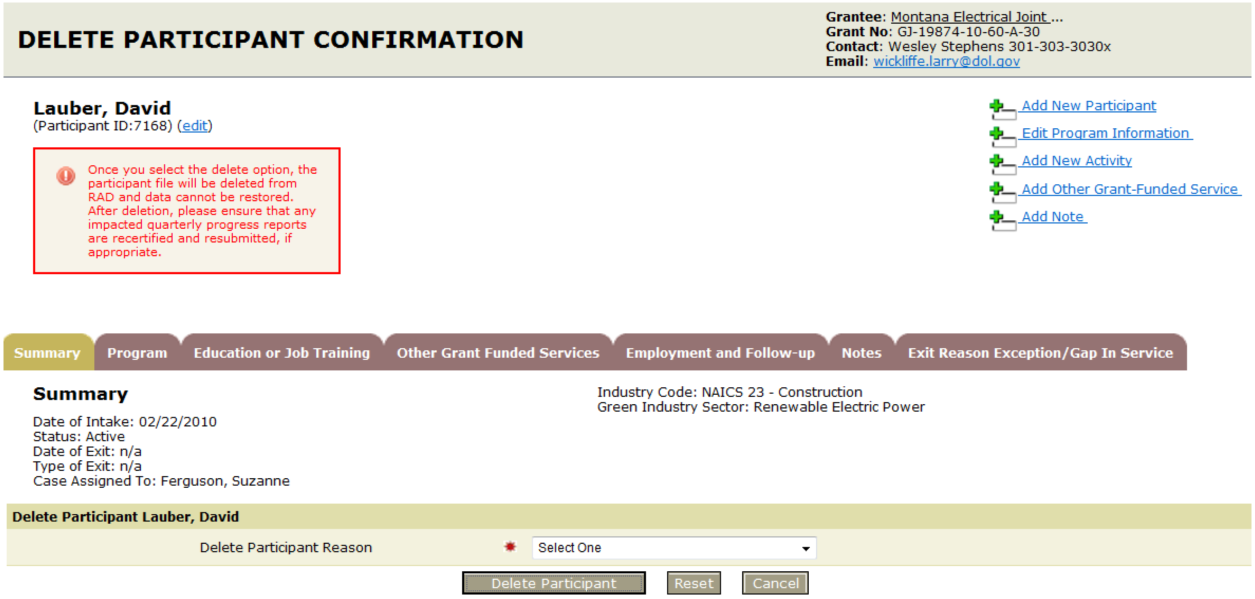
2. Click the **Delete Participant** link to display the Delete Participant Confirmation page (Figure 33).

Figure 33: Delete Participant Link



3. The system displays the Delete Participant Confirmation page (Figure 34).

Figure 34: Delete Participant Confirmation Page



4. Select the reason for deletion from the Delete Participant Reason field (Figure 35). The following reasons are available on the drop-down list:

   - Individual is not an Eligible Participant
   - Other – please specify.

   If you select 'Other', you must enter an explanation in the provided field (Figure 36).

Figure 35: Delete Participant Reason Field

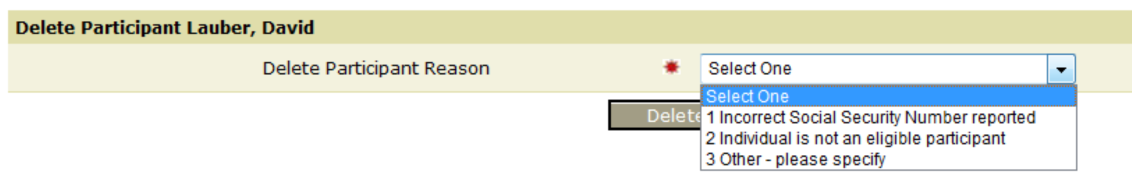
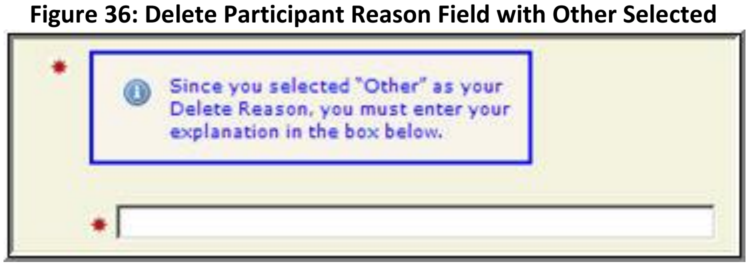
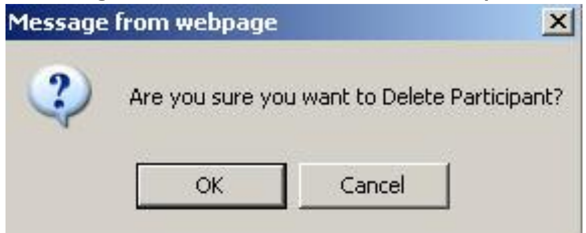


Figure 36: Delete Participant Reason Field with Other Selected



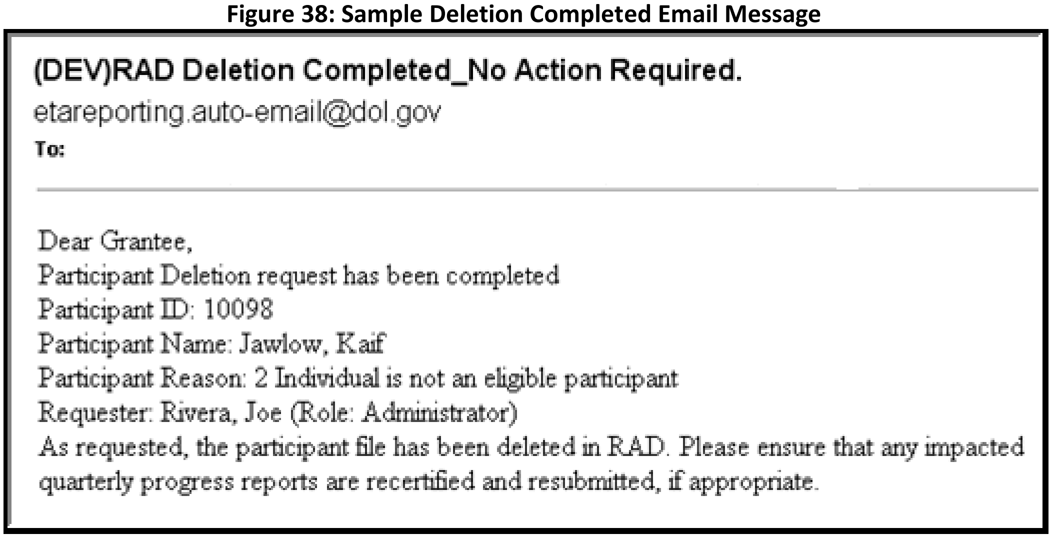
5. To continue with the deletion process, click **Delete Participant**. The system displays a confirmation to delete **prompt** (Figure 37).

Figure 37: Delete Confirmation Prompt



6. To complete the deletion process, click **OK**. The system displays a successful deletion confirmation message and sends an email to the Authorized Grantee Representative, Administrators, and Area Case Managers or Case Managers assigned to the specific participant file deleted (Figure 38).

Figure 38: Sample Deletion Completed Email Message



(DEV)RAD Deletion Completed_No Action Required.
etareporting.auto-email@dol.gov
To:

Dear Grantee,
Participant Deletion request has been completed
Participant ID: 10098
Participant Name: Jawlow, Kaif
Participant Reason: 2 Individual is not an eligible participant
Requester: Rivera, Joe (Role: Administrator)
As requested, the participant file has been deleted in RAD. Please ensure that any impacted quarterly progress reports are recertified and resubmitted, if appropriate.

Reactivate a Participant

This function allows the Authorized Grantee Representative and Administrators to reactivate a participant with an exited status in the RAD System. Reactivating a participant also reactivates all related participant information.

Note: Once you complete the reactivate option, the participant's status changes to active. Grantee staff should make any updates to the reactivated participant's file (that is, add an activity, service, or Gap-in-Service) the same day of the reactivation to avoid a potential re-exit of the participant through the nightly RAD System auto-exit process. Participants will be auto-exited at the end of the day if 90 days have passed form the end date of the participant's latest grant-funded service and an active Gap in Service does not exist.

Please recertify and resubmit any impacted Quarterly Progress Reports, if appropriate. However, to ensure the ETA-9153 Form calculates correctly, grantees should recertify and resubmit the Quarterly Progress Reports the day after participant records have been deleted or reactivated.

1. To reactivate a participant, click on the name of the participant from the **Participants Overview page.**

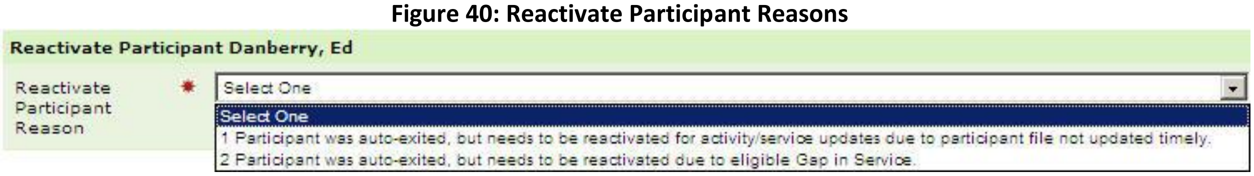
2. Click the **Reactivate this Participant** link (Figure 39). The system displays the Reactivate Participant Confirmation page.

Figure 39: Reactivate Participant Link

3. Select the **Reactivate Participant Reason** (Figure 40). The following reasons are available on the drop-down list:

    - Participant was auto-exited, but needs to be reactivated for activity/service updates due to participant file not updated timely
    - Participant was auto-exited, but needs to be reactivated due to eligible Gap-in- Service

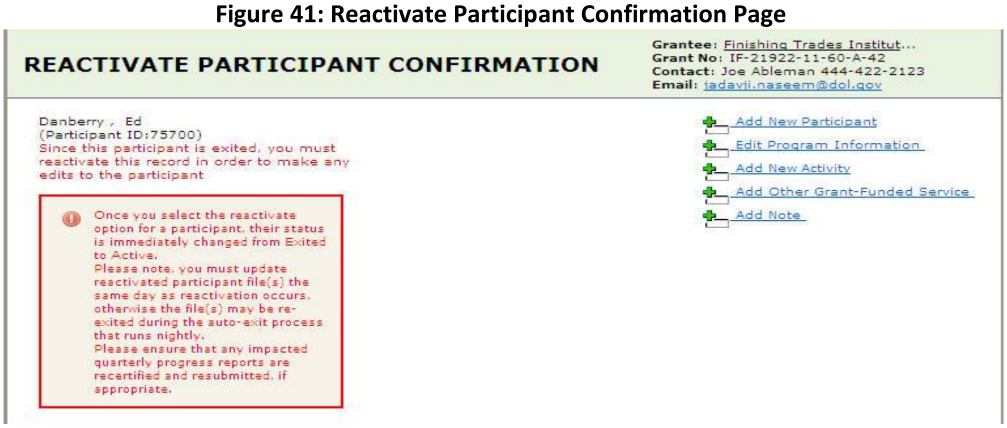
Figure 40: Reactivate Participant Reasons



4. To change the reactivation reason, click **Reset**. To exit the reactivation process, click **Cancel**.

5. To continue with the reactivation **proce**ss, click **Reactivate Participant**. The system displays the confirmation to reactivate window (Figure 41).

Figure 41: Reactivate Participant Confirmation Page

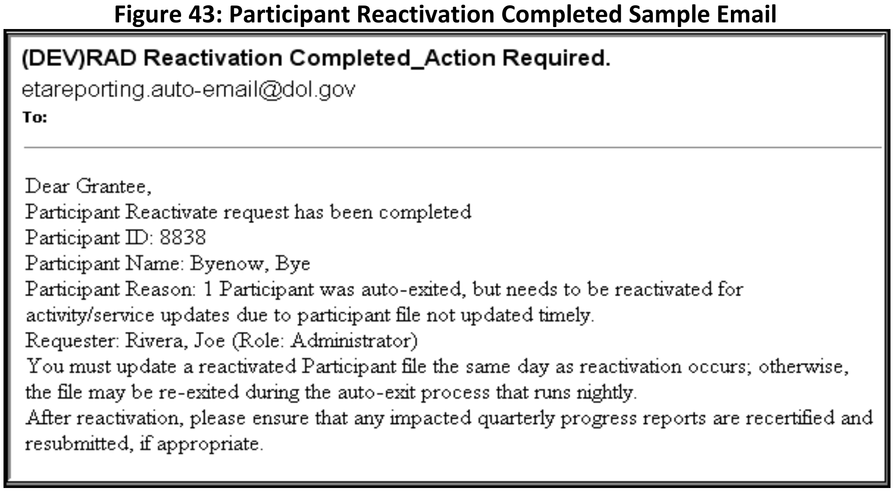


6. To complete the reactivation process, click **OK** (Figure 42).

Figure 42: Confirmation to Reactivate Window

7. The entire participant record is re-activated. The system displays a successful reactivation message and sends an email to the Grantee for the reactivated participant (Figure 43).

Figure 43: Participant Reactivation Completed Sample Email



(DEV)RAD Reactivation Completed_Action Required.
etareporting.auto-email@dol.gov
To:

Dear Grantee,
Participant Reactivate request has been completed
Participant ID: 8838
Participant Name: Byenow, Bye
Participant Reason: 1 Participant was auto-exited, but needs to be reactivated for activity/service updates due to participant file not updated timely.
Requester: Rivera, Joe (Role: Administrator)
You must update a reactivated Participant file the same day as reactivation occurs; otherwise, the file may be re-exited during the auto-exit process that runs nightly.
After reactivation, please ensure that any impacted quarterly progress reports are recertified and resubmitted, if appropriate.

Reassign a Participant

The Authorized Grantee Representative, Administrators, and Area Case Managers may use this function to reassign participants from one user to another (with the exception of Read-Only Users).

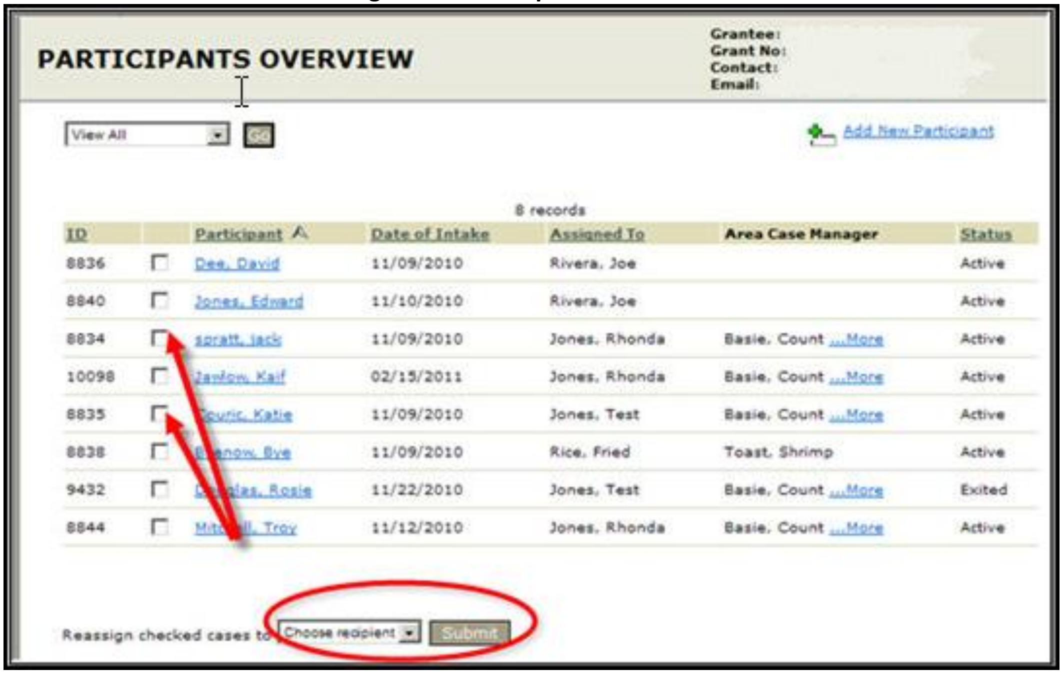
1. From any page in the RAD system, click on the **PARTICIPANTS** tab. The system displays the **Participants Overview** page (Figure 44).

2. Click the checkbox next to the name of the participant(s) you want to reassign.

3. In the drop-down list, select the user to which you want to reassign the checked participant.

4. Click **Submit**. The selected participant(s) are reassigned to the selected user.

Figure 44: Participants Overview



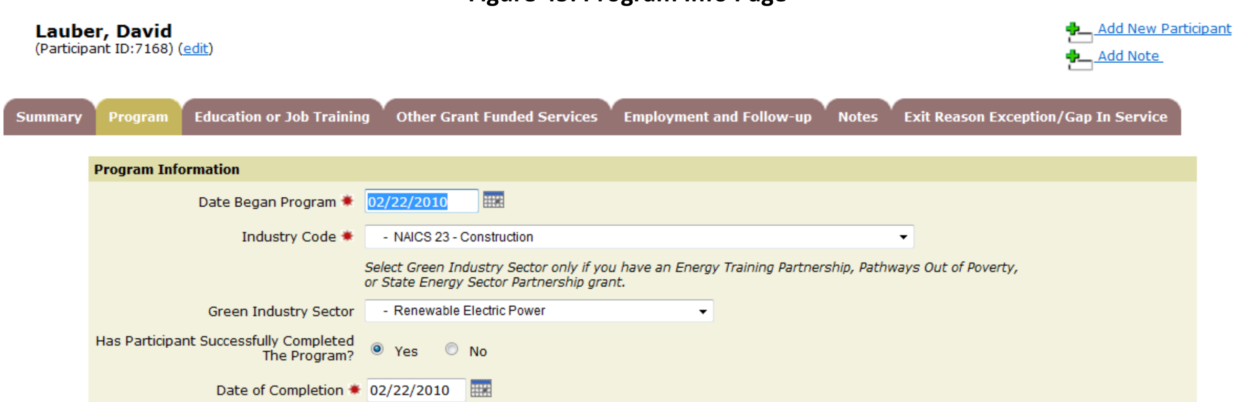
Add Program Information

Note: Users must enter the participant's program information before any Education or Job Training activities can be added to the participant file. To enter program information:

1. From the **Participants Overview** page, click on the name of the participant for whom you want to add program information. The **Participant Summary** page of the selected participant is displayed.

2. Click on the **Program tab** to display the **Program Info page** (Figure 45).

Figure 45: Program Info Page



3. Enter the necessary Program Information: the Date Began Program (i.e., date of first grant-funded service), the NAICS Industry Code, and the Green Industry Sector.

Note: You are not able to select **Yes** to the question: **Has Participant Successfully Completed the Program?** until all of the participant's Education/Job Training activities are complete (this is indicated by entering a date in the **Date Ended** field). Go to the Add Education/Job Training section of this user guide to learn how to add participant education and job training activities to a participant file.

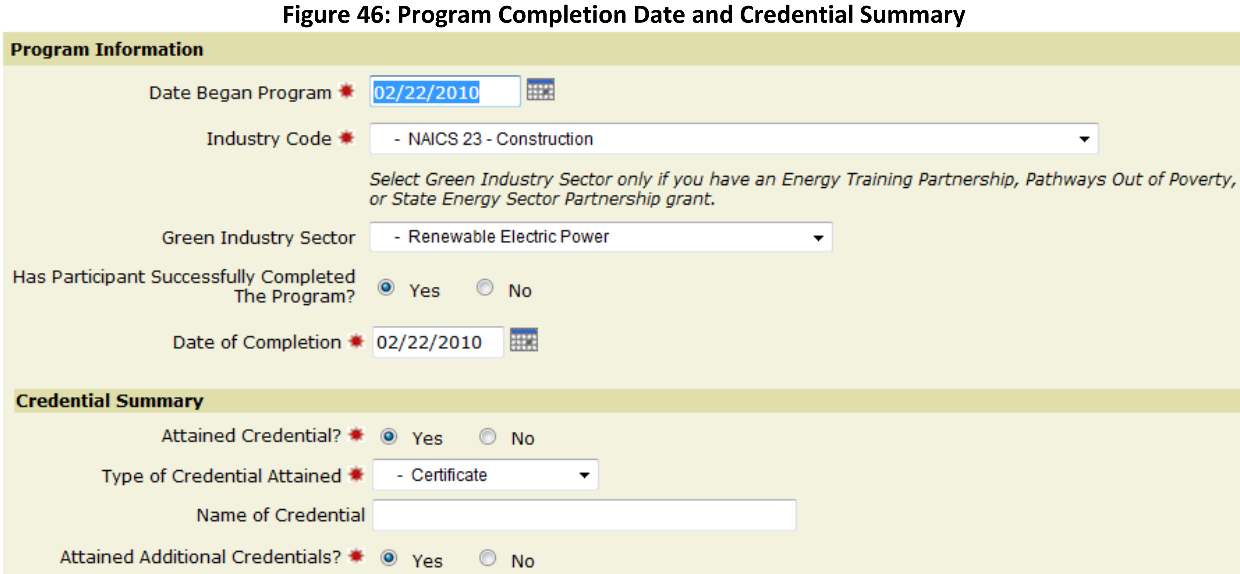
4. Once a participant has completed the Education and Job Training program, you may select **Yes** to the question **Has Participant Successfully Completed the Program?**. The system will then display additional fields, as shown below (Figure 46).

5. Enter the Date of Completion (date participant successfully completed the program), when appropriate.

   Note: Some grantees' education/training activities are a series of courses or activities, and the intent of their education/training activities is for individuals to complete the entire series of courses or activities. In this case, "successful completion" should be defined as finishing the entire series of courses or activities.

   If an Education/Job Training activity with an End Date that is after Date of Completion is part of the participant's Education/Job Training program (and therefore the participant has not yet successfully completed the education/Job Training program), select Cancel and the Date of Completion should be edited to reflect the End Date of the participant's latest Education/Job Training Activity.

Figure 46: Program Completion Date and Credential Summary

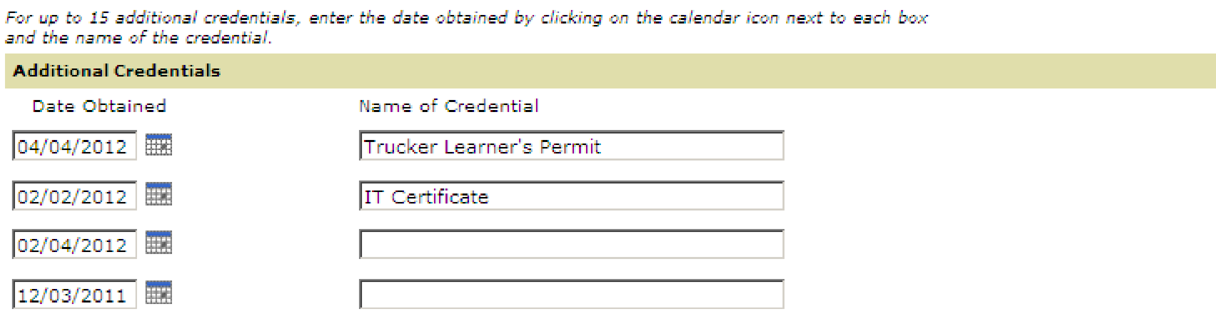


For up to 15 additional credentials, enter the date obtained by clicking on the calendar icon next to each box and the name of the credential.

6. Fill in credential information, if appropriate. If you select **Yes** to **Attained Additional Credentials?** field, the system displays the additional fields. Fill in the date(s) that any additional credentials were obtained (up to 15 additional credentials). **Date Obtained** is a required field and **Name of Credential** is optional (Figure 47).

7. Click **Save**.

Figure 47: Additional Credentials



Credential Definition

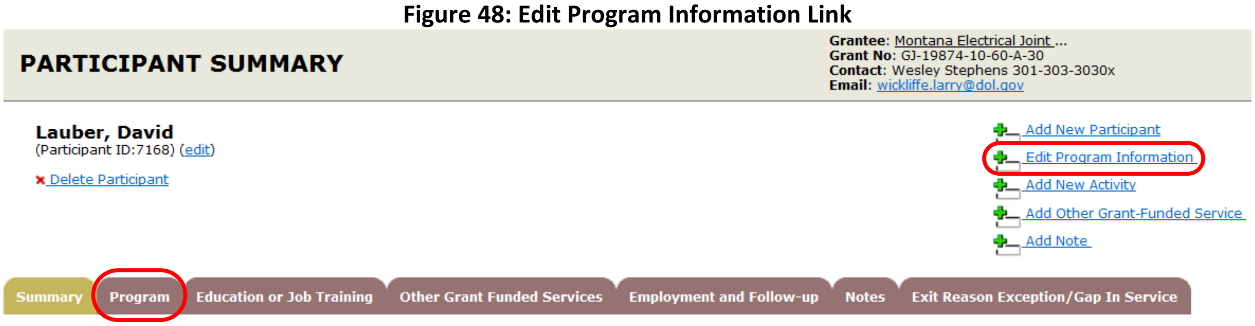
ETA's definition of "Number Received Credentials" and "Total Credentials Received" on the ETA-9153 Form includes credentials obtained for participants *upon program completion.* Credentials obtained prior to program completion should not be reported in RAD, as they do not align with the definitions of "Number Received Credentials" and "Total Credentials Received," and therefore will not be populated on the ETA-9153 Form. Previously, grantees were able to report a participant as a "successful completer" and then enter credentials with dates prior to the date of completion. A date validation has been added to RAD to prevent grantees from misreporting this data element. Credentials with dates prior to program completion can no longer be entered in RAD.

Please note, all pre-completion credentials can be reported in the "Additional information" section of the ETA-9153 Form, if appropriate.

Update Program Information

1. Once in the file of the participant you wish to update, click the **Edit Program Information Link** or click on the **Program Tab** (Figure 48)**.**

Figure 48: Edit Program Information Link



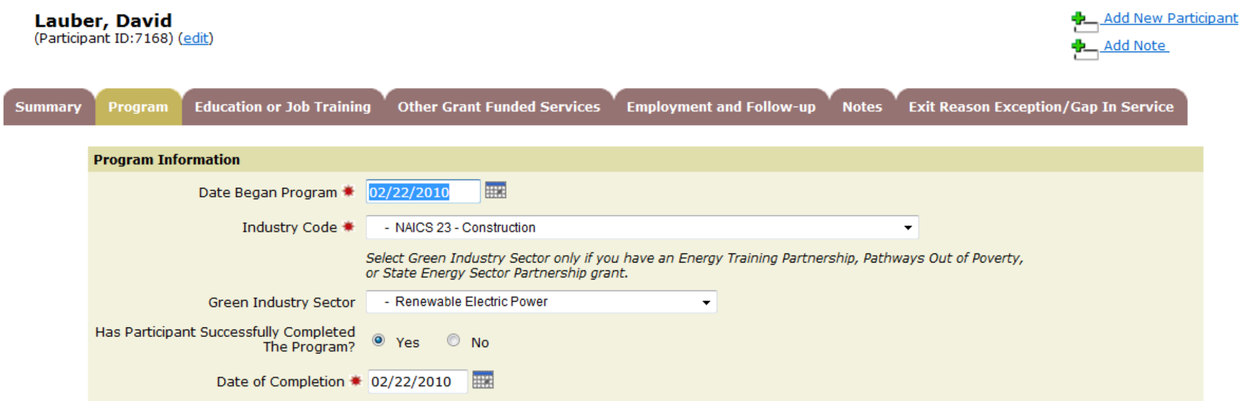
2. The system displays the **Program Info page** (Figure 49).

3. Enter any updates to the participant's program information.

Note: If the question **Has the Participant Successfully Completed the Program?** was previously answered as **Yes** and you are updating the information to **No**, any information entered into the Credential Summary, Additional Credentials, and the Employment and Follow-up tab (i.e., Employment information) will be deleted. The Credential Summary, Additional Credentials, and Employment, and Follow-up Information are all data elements that are only captured after program completion.

4. Click **Save**.

Figure 49: Program Info Page



Add Education or Job Training Activity

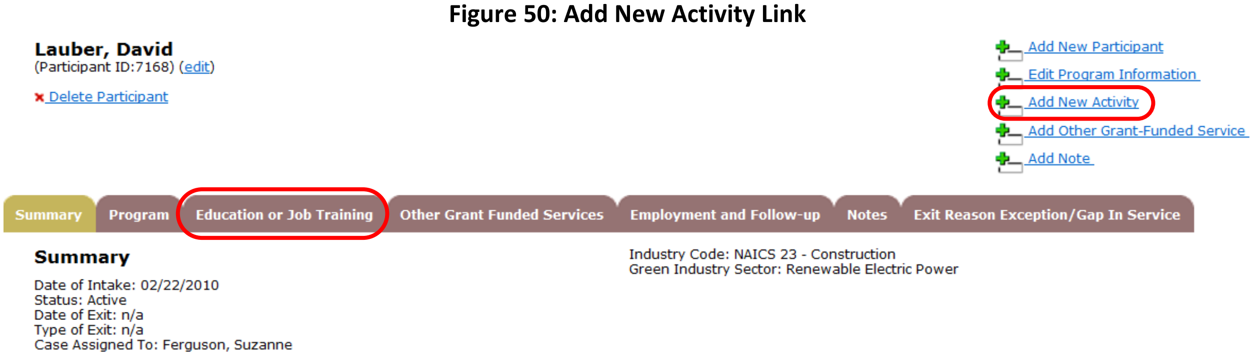
Note: Users must enter the participant's Program Information before adding Education or Job Training activities to the participant file.

1. Click on the **PARTICIPANTS** tab from any page in the RAD system to display the **Participants Overview** page.

2. Click on the name of the participant for whom you want to add a new activity to display the **Participant** Summary page.

3. Click the **Add New Activity link or the Education or Job Training Tab** (Figure 50).

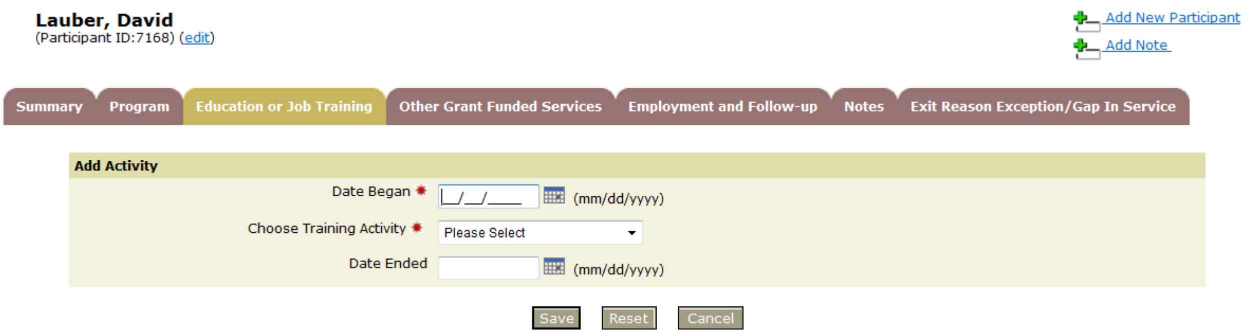
Figure 50: Add New Activity Link



4. The system displays the **Education/Job Training Activity** page. Click on the **Add New Activity** link to add an education or training activity (Figures 51 and 52).

Figure 51: Education/Job Training Activity Page

Figure 52: Add New Activity Page



5. Enter activity information.

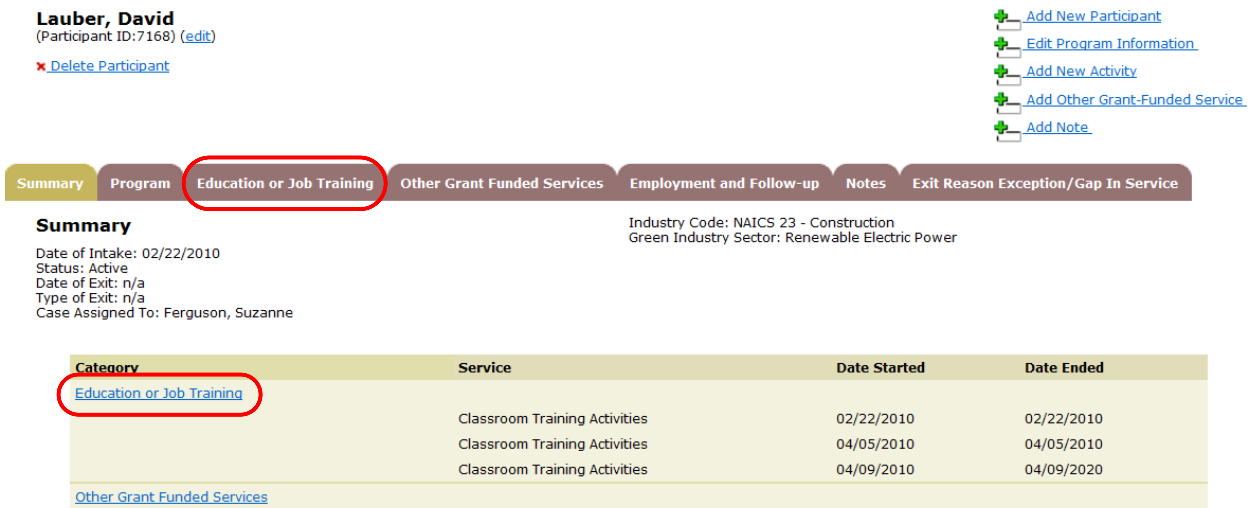
   Note: You cannot enter a date that a participant began an education or training activity in the **Date Began** field prior to the date that a participant began the program in the **Date Began Program** field.

6. Click Save. The system will display the activity on the participant's summary page.

Update Education or Job Training

1. From the Participant Summary page, click on the **Education or Job Training tab** or under Category, click on the Education or Job Training link (Figure 53). The system displays the Education or Job Training page (Figure 54).

Figure 53: Education or Job Training Link

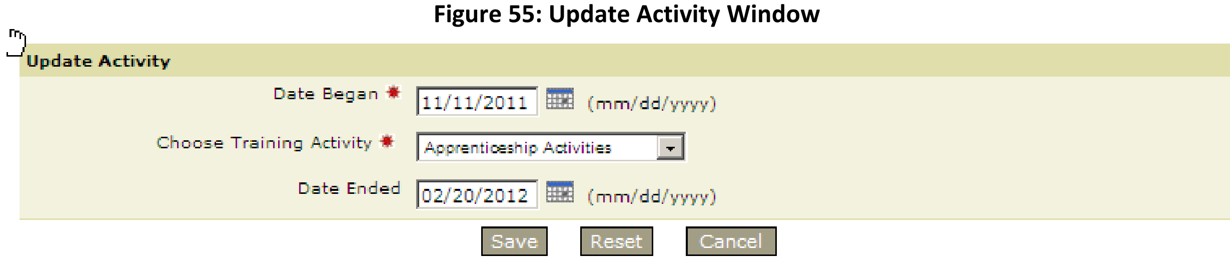


2. In the **Training Activity section**, click the activity you want to update (Figure 54). The system displays the **Update Activity Window** (Figure 55).

3. Enter your updates and click **Save**.

Figure 54: Education or Job Training Page

Figure 55: Update Activity Window



Delete Education or Job Training Activity

This function allows users (except Read-Only users) to delete an education or job training activity for an active participant.

Note: Please be sure to re-certify and re-submit any impacted Quarterly Progress Reports.

1. From the Participant Summary page, click on the Education or Job Training tab or under Category, click on the Education or Job Training link. The system displays the Education or Job Training page.

2. Under the **Training Activity** section, select the activity you want to delete (Figure 56).

Figure 56: Delete Training Activity

3. The system displays the selected Education or Job Training activity window. Click the **Delete Education or Job Training Activity** link (Figure 57).

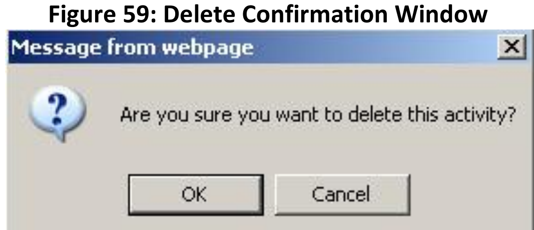
Figure 57: Education or Job Training Window

4. The system displays the **Delete Activity** window (Figure 58). To continue with the activity deletion process, click Delete.

Figure 58: Delete Activity Window

5. To complete the activity deletion process, click **OK** (Figure 59).

Figure 59: Delete Confirmation Window



6. The participant's training activity record is deleted and the system displays a successful activity deletion confirmation message.

   Note: Once you select the delete activity option, the participant's training activity will be deleted from the RAD System and data cannot be restored.

   Please ensure that any impacted Quarterly Progress Reports are recertified and resubmitted.

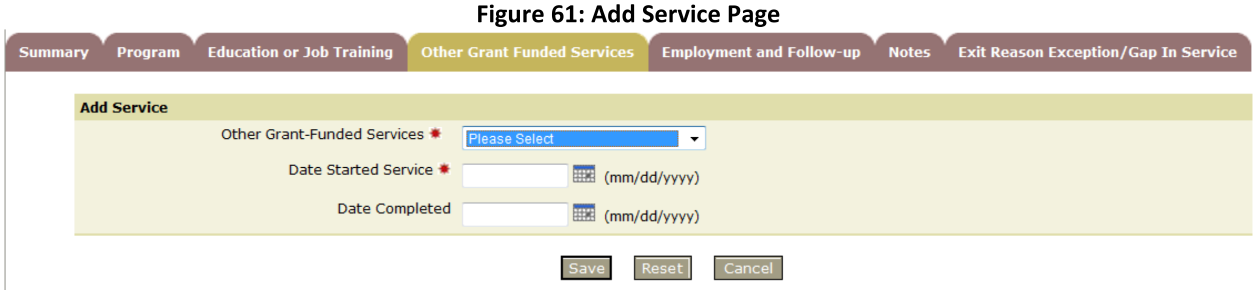
Add Other Grant-Funded Services

1. From the Participant Summary page of a participant file, click on the **Add Other Grant-Funded Service** link or the Other Grant Funded-Service tab to add grant-funded services that were provided to the participant (Figure 60).

Figure 60: Participant Summary Page

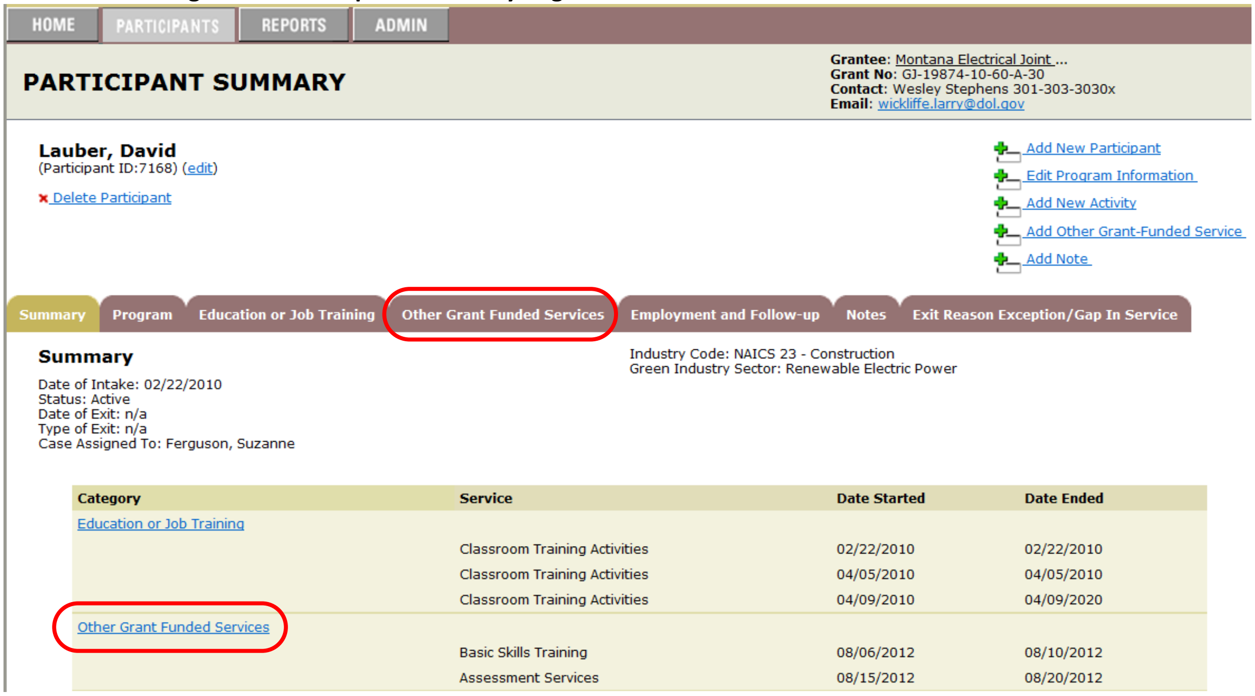
2. The system displays the **Add Service** page (Figure 61). Complete all fields and click **Save**.

Figure 61: Add Service Page



3. The system will display the service on the **Participant Summary** page (Figure 62).

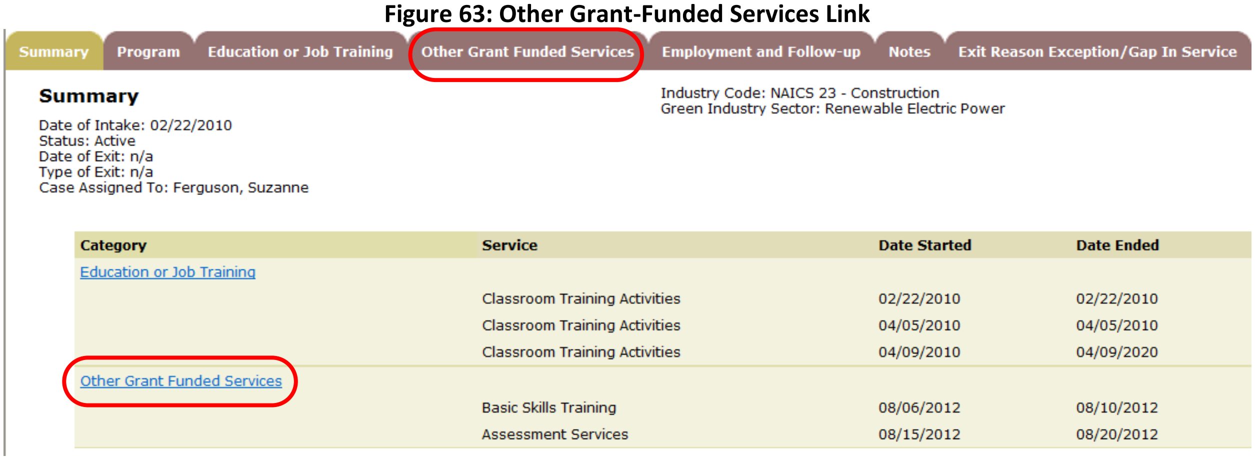
Figure 62: Participant Summary Page with New Other Grant-Funded Service Added



Update Other Grant-Funded Service

1. From the Participant Summary page of the participant file you want to update, click on the **Other Grant-Funded Service** tab or under Category, click on Other Grant-Funded Services (Figure 63).

Figure 63: Other Grant-Funded Services Link

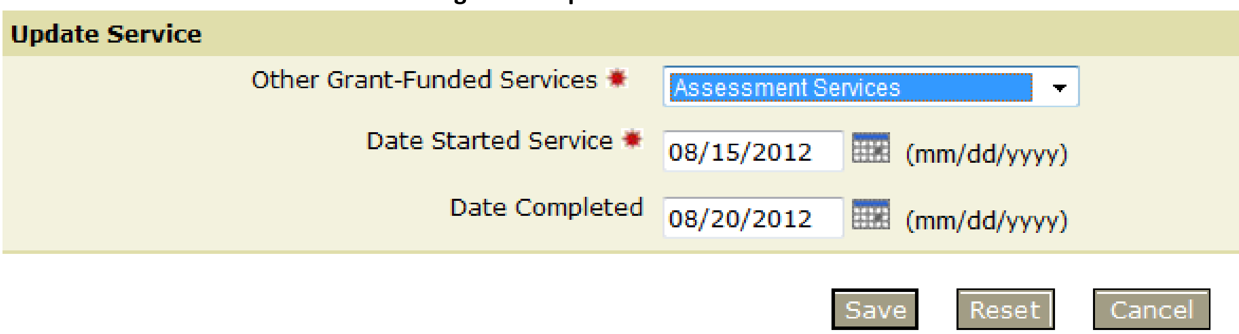


2. The system displays the list of Other Grant-Funded Services (Figure 64).

Figure 64: Other Grant-Funded Services

3. Click on the service you want to update. The system displays the **Update Service window** (Figure 65). Enter your updates and click **Save**.

Figure 65: Update Service Window



Delete Other Grant-Funded Service

This function allows users (except Read-Only users) to delete an Other Grant-Funded service for an active participant.

Note: Please be sure to recertify and resubmit any impacted Quarterly Progress Reports.

1. From the **Participant Summary** page, click on the **Other Grant-Funded Service tab** or under Category, the **Other Grant-Funded Services link**. The system displays the **Other Grant-Funded Service page** (Figure 66).

2. Click on the Other Grant-Funded Service you would like to delete.

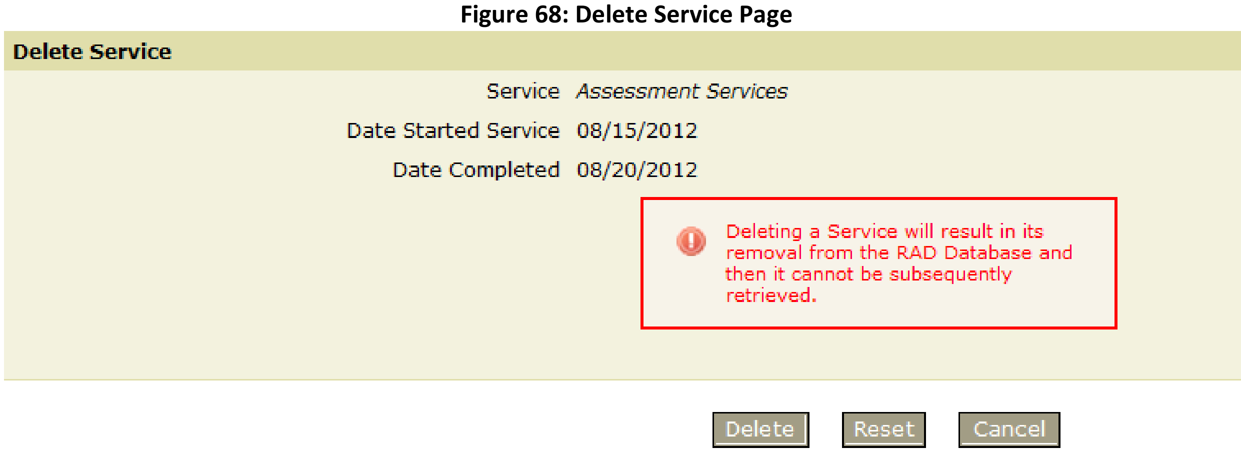
Figure 66: Other Grant-Funded Services

3. The system displays the Other Grant-Funded Services page. Click the **Delete Other Grant-Funded Service** link (Figure 67).

Figure 67: Delete Other Grant-Funded Service Link

4. The system displays the **Delete Service window**. Click cancel to exit the deletion process or click Delete to continue the deletion process. When clicking on delete, the system displays the confirmation to delete service prompt (Figure 68).

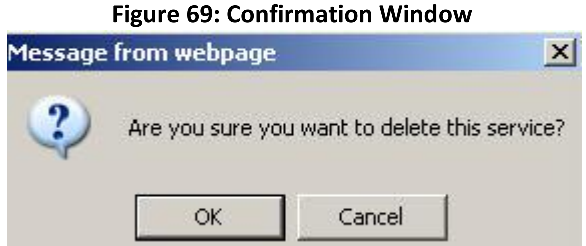
Figure 68: Delete Service Page



5. To complete the service deletion process, click **OK**.

Note: Once you select the delete service option, the participant's grant-funded service will be deleted from the RAD System and data cannot be restored. The participant's other grant-funded service record is deleted and the system displays a successful service deletion confirmation message (Figure 69).

Figure 69: Confirmation Window



The participant's other grant-funded service record is deleted and the system displays a successful service deletion confirmation message. Please be sure to recertify and resubmit any impacted Quarterly Progress Reports.

Add or Update Employment and Follow-up Information

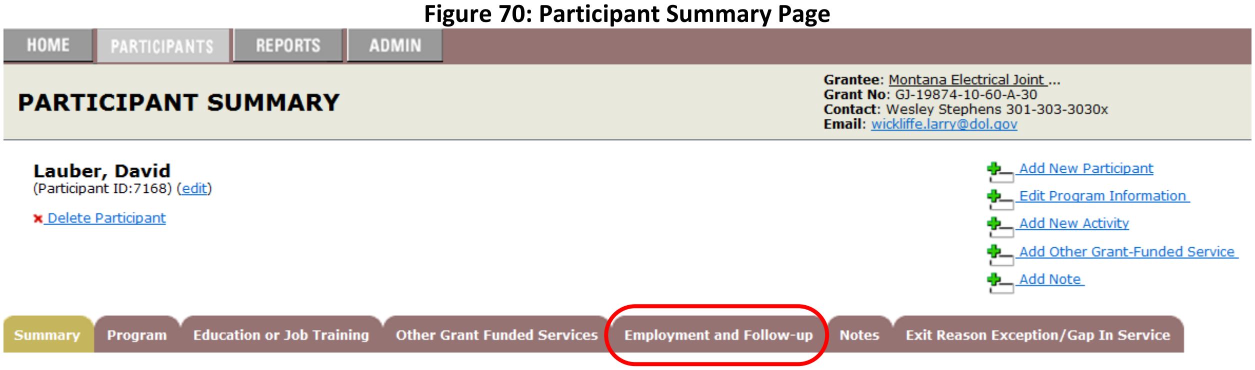
Grantees cannot complete the employment and follow-up section of the participant record file until after the participant has been reported as successfully completing the education or job training program, as it aligns with the OMB-approved reporting definition for entered employment on the ETA-9153 Form.

Note: Completion is recognized by the RAD System when the user enters **Yes** in the field **Has Participant Successfully Completed the Program?** under the Program tab.

1. From the **Participant Overview** page, click on the name of the participant for whom you want to add **Employment and Follow-up** information. The system displays the **Participant Summary** page for that participant.

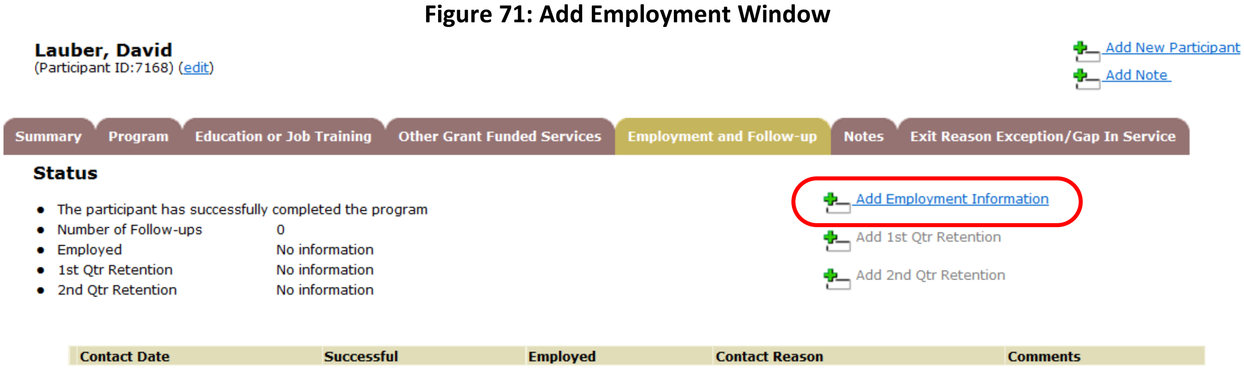
2. Click on the **Employment and Follow-up** tab (Figure 70) to display the participant's status for program completion, employment, and follow-up information.

Figure 70: Participant Summary Page



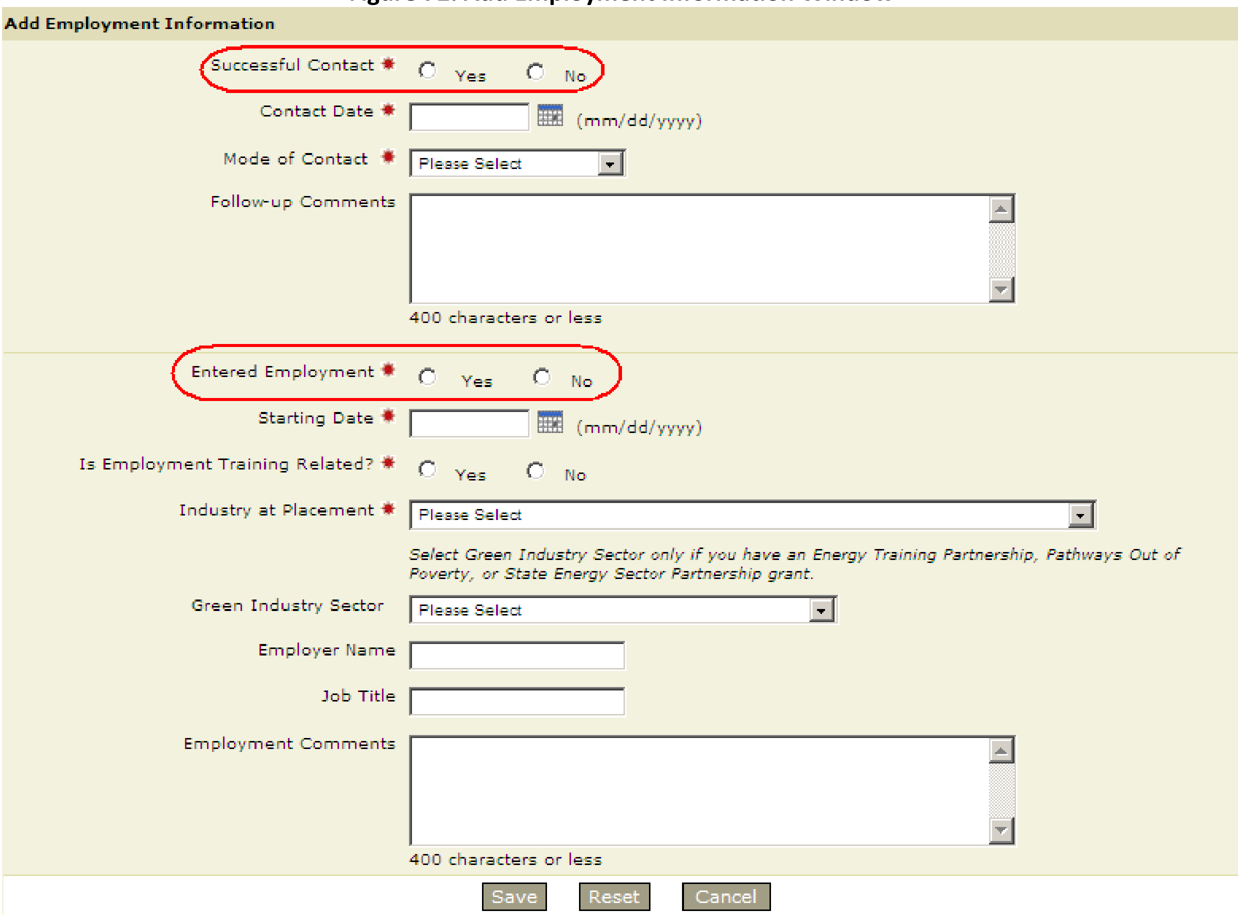
3. To add a follow-up, click the **Add Employment Information** link (Figure 71) to display the **Add Employment Information** window.

Figure 71: Add Employment Window



4. Enter the follow-up information in the required fields in the Add Employment Information window (Figure 72).

Figure 72: Add Employment Information Window



Note: The following sequence is designed to ease the flow of contacting, adding participant employment information, and following up for participant retention in RAD:

1. If you enter **No** to **Successful Contact**, the employment fields become inactive (grayed out).

   - Add Contact Date and Mode of Contact regardless if you did not have a successful contact with the participant.

2. If you answered **Yes** to **Successful Contact**, add the contact date and mode of contact. Any follow up comments are not required, but you can use this field for case management purposes.

   Note: Information entered is the “Follow-up Notes” field is not viewable by ETA. Continue by entering the employment information section. Indicate **Yes** or **No** to **Entered Employment**.

   - If you answer **No** to **Entered Employment**, the remainder of the fields in the employment section become inactive (grayed out).

- If you answer **Yes** to **Entered Employment**, continue by entering the rest of the employment information.
- If you answer **No** to '**Is Employment Training Related?**' the following two fields - **Industry at Placement** and **Green Industry Sector** become inactive (grayed out).
- If you answer **Yes** to **'Is Employment Training Related?' select the NAICS code Industry** at placement.
- Select Green Energy Sector only if you have an Energy Training Partnership, Pathways out of Poverty, State Energy Sector Partnership or Green Jobs Innovation Fund Grant.

3. Click **Save**. The system displays the Employment and Follow-up summary page with the new information added at the bottom of the page (see Figure 73). **Note:** You cannot update the individual follow-up attempts but you can delete it from the system; however, you can add as many follow-up attempts as necessary, prior to reporting participant's employment (or retention) status.

Figure 73: System displays added contact attempt (Successful or Not)

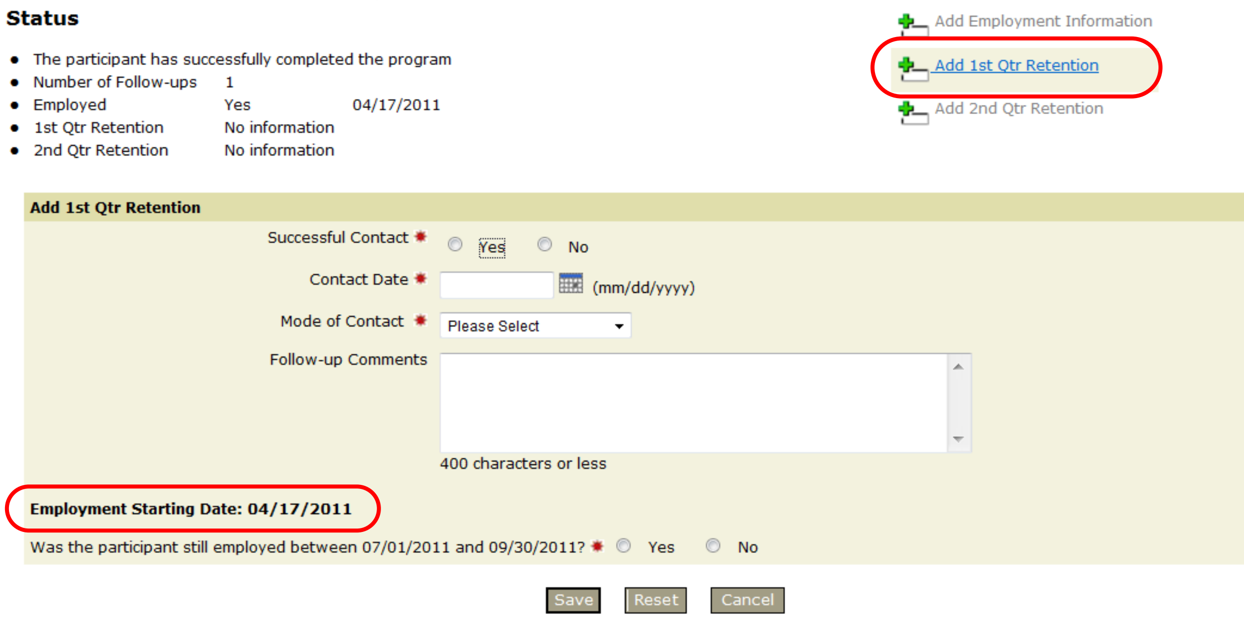
Add 1st Quarter Retention Information

The **1st Qtr Retention** link will be enabled when the first quarter following the date the participant enters employment arrives.

You can hover your curser over the hyperlink to determine the timeframe to add this information.

1. Click the **Add 1st Quarter Retention** link to enter 1st quarter retention information. The system displays the **Add 1st Quarter Retention Information page** (Figure 74).

Figure 74: Add 1st Quarter Retention Information



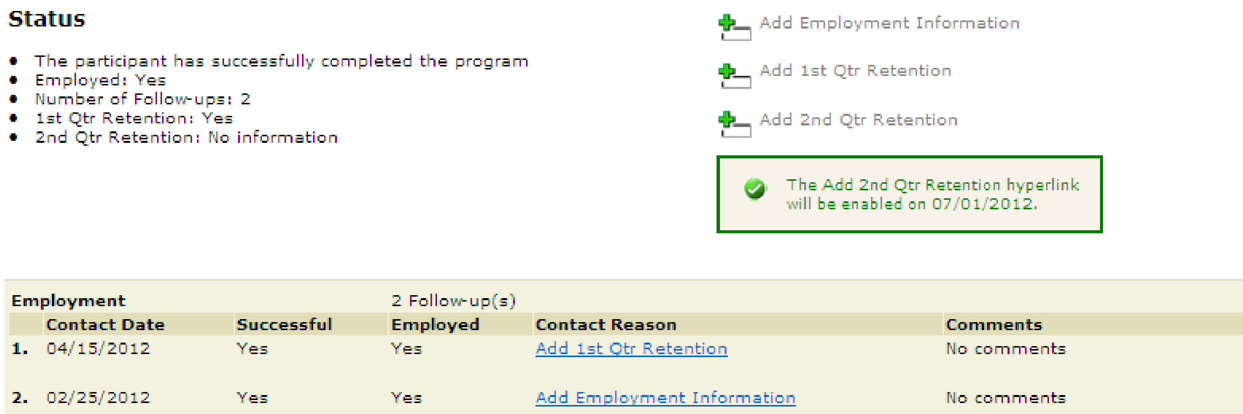
2. Indicate **Yes** or **No** to **Successful Contact**, the **Contact Date**, **Mode of Contact,** and any Follow-up Comments (up to 400 characters). If you enter **No** to **Successful Contact**, the field for employment verification, **Was the participant still employed between beginning quarter date and ending quarter date?**, becomes inactive (grayed out). If you enter **'Yes**" to **'Successful Contact'**, you may answer the employment verification question.

3. Click **Save**. The system displays the **Employment and Follow-up** window, showing the added follow-up information at the bottom of the window. You cannot update the individual follow-up attempts, but you can delete them from the system. You can add as many follow-up attempts as necessary, prior to reporting participant's employment (or retention) status.

Add 2nd Quarter Retention Information

The **Add 2nd Quarter Retention link** (Figure 75) will be enabled when the second quarter following the date participant Entered Employment arrives, and **only** if a participant was reported as **Yes** for 1st Quarter Retention. You can hover your curser over the Add 2nd Quarter Retention link to determine the timeframe to add this information.

Figure 75: Add 2nd Quarter Retention Link



1. Click the Add 2nd Quarter Retention link. The system displays the Add 2nd Quarter Retention Information page.

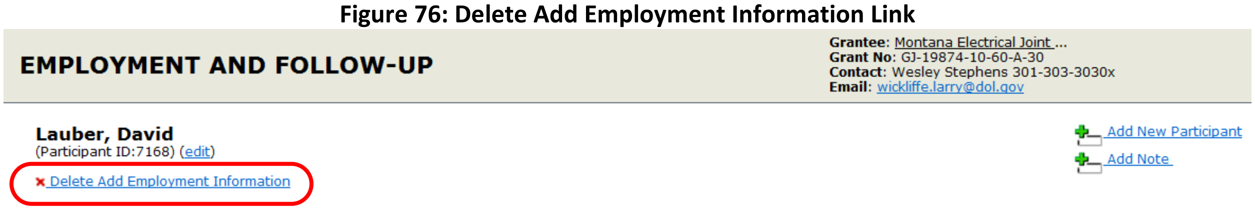
2. Repeat the steps in the To Add 1st Quarter Retention Information section.

Deleting Employment and Follow-Up Activities

1. All RAD users have the ability to delete employment and follow-up information for their participants in the event that the employment information entered is incorrect.To delete the employment and follow-up retention activities, select the hyperlinked activity listed underneath **Contact Reason** in the **Employment and Follow-Up Status** page.

2. The system displays a view only page of the selected activity entry. Select **Delete Add Employment Information,** located underneath the participant name and ID (Figure 76).

Figure 76: Delete Add Employment Information Link



3. A window displays indicating that the employment record for the participant will be deleted. Select **Delete** to proceed, or **Go Back** to Cancel.

4. Select **OK** to delete the employment information entry. This action will also delete any follow-up retention activities entered into the system related to the employment entry.

Exit Reason Exception/Gap in Service

The Exit tab has recently been renamed the **Exit Reason Exception/Gap in Service** tab.

What is Exit?

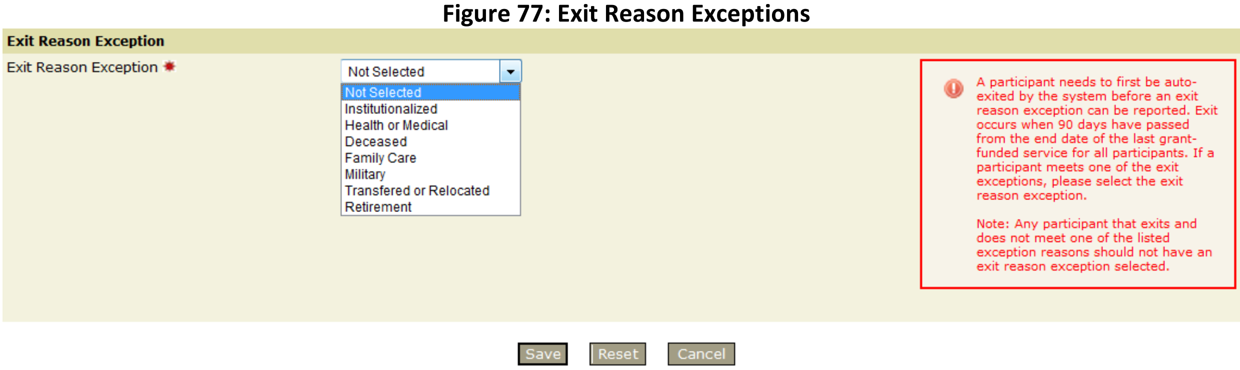
Exit occurs when a participant has not received grant-funded services for 90 consecutive calendar days, regardless of the reason for 90 days of inactivity (e.g., drop out, completed all training activities, etc.). A participant who has 'exited' the training program is called an 'exiter.' The RAD system will exit a participant from the system if that participant has not received a grant-funded service for 90 consecutive calendar days. In order for ETA to compute Common Measures data, RAD will record the date of exit of the participant. The date of exit, along with employment status and social security numbers, is used to calculate Common Measures (e.g., because they are considered unemployable).

Exit Reason Exception

A participant needs to be auto-exited by the system before an exit reason exception can be reported in RAD. Exit occurs when 90 days have passed from the end date of the last grant-funded service for all participants. Most exiters from your training program will fall under a normal exit after 90 days have passed from the end date of the latest grant-funded service (e.g., drop out, completed all training activities, etc.), however, several rare exceptions to the normal exit policy consider a participant 'unemployable.' If a participant meets one of the exit exceptions, please select the exit reason exception (Figure 77). These exceptions include:

- Institutionalized
- Health or Medical
- Deceased
- Family care
- Military
- Transferred or Relocated
- Retirement

Figure 77: Exit Reason Exceptions



If the participant exits the training program due to one of the reasons listed above, they will not be included in the calculations for Common Measures Results tracked and reproved by ETA.

Note: Any participant that auto-exits and does not meet one of the listed exception reasons should not have an exit reason exception selected.

To Add an Exit Reason Exception

1. Click on the Exit Reason Exception/Gap in Service Tab

2. Under the Exit Reason Exception heading, select the participant's exit reason exception.

3. Click Save. A window will appear "Are you sure you want to add this Exit Reason Exception?" Hit OK.

4. A History Log will track the participant's Gap in Service and Exit Reason Exception entries.

Add or Update a Gap-in-Service (Delay Exit)

Normally, the RAD system will handle exiting participants automatically (90 days from the end date of the latest activity or service). However, in certain situations, you may need to delay a participant's exit by adding a Gap-in-Service. A Gap-in-Service has a maximum period of 180 days. The participant must intend to return to grant-funded activities once the Gap-in-Service ends and must meet one of the following criteria:

- Delay before beginning of training (for example, a summer break)
- Health or family care issues
- Temporary move from the area

To add or update a gap-in-service:

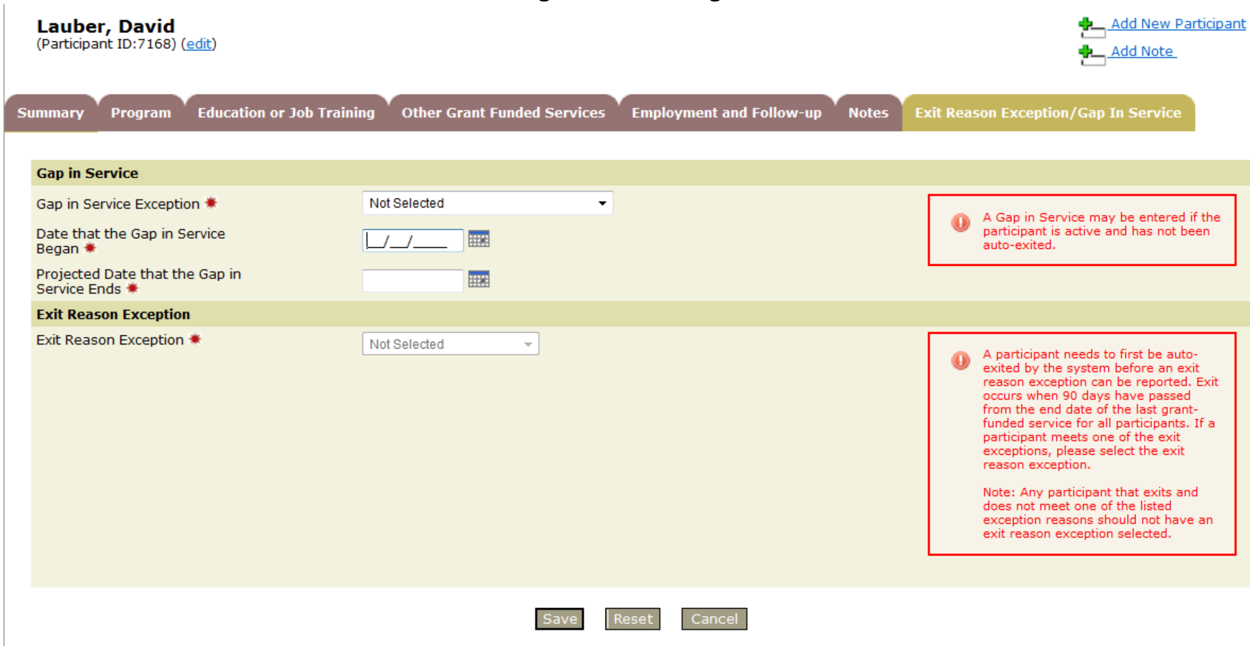
1. From the **Participants Overview** page click on the name of the participant for whom you want to add a Gap-In-Service. The system displays the **Participants Summary** page of the selected participant.

2. Click the **Exit Reason Exception/Gap in Service** tab (Figure 78).

Figure 78: Exit Reason Exception/Gap in Service Tab

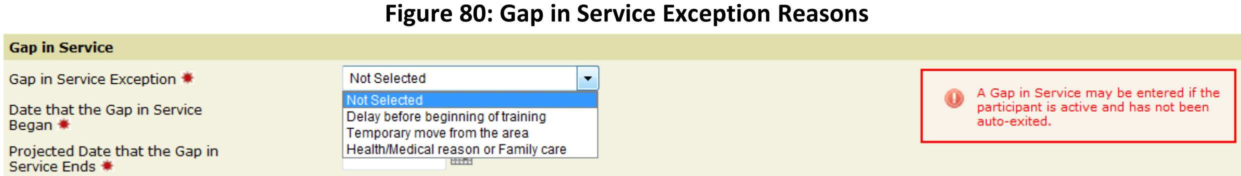
3. The system displays the **Exit** page (Figure 79).

Figure 79: Exit Page



4. Select the reason for the Gap in Service from the drop down menu (Figure 80).

Figure 80: Gap in Service Exception Reasons



5. Enter the **Date that the Gap-in-Service Began** and the **Projected Date the Gap in Service Ends**.

   Note: The begin date for the Gap-in-Service cannot be greater than 90 days (in the future) from the current date. The end date cannot be greater than 180 days from the begin date.

6. Click **Save**. An active Gap-in-Service will override the System's auto-exit process and prevent a participant from being auto-exited in RAD.

7. To update Gap-in-Service Information, follow the steps above. All fields may be updated, but the total period may not exceed 180 days.

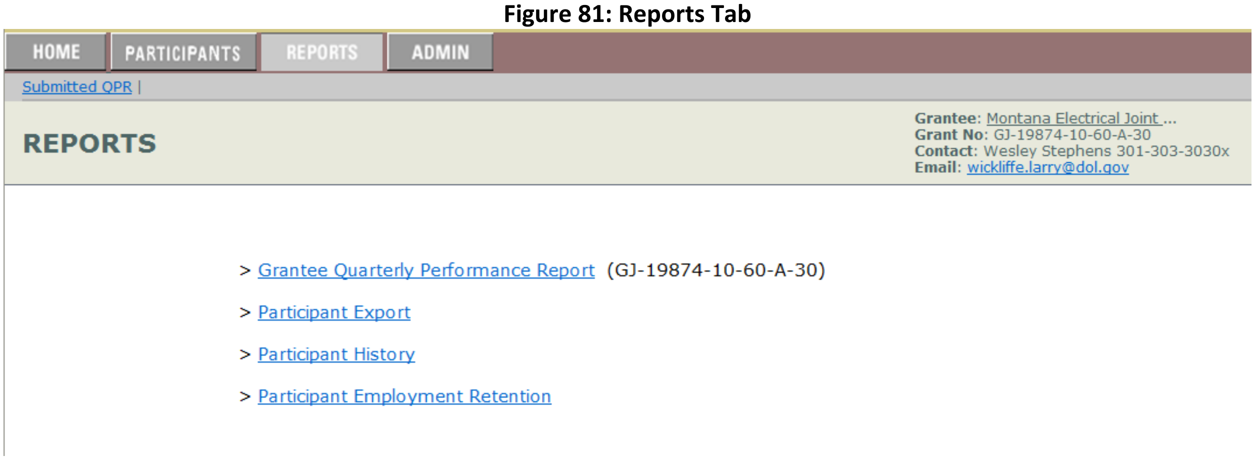
   Note: You will not be able to update the fields if the participant has already exited. If appropriate, an exited participant can be reactivated to allow a Gap in Service to be added.

REPORTS

The Reports function tab in RAD will produce various reports to help you manage your ARRA grant. There are several options to select to run reports about your participant files, as shown in Figure 81:

- Grantee Quarterly Performance Report
- Participant Export
- Participant History
- Participant Employment Retention

Figure 81: Reports Tab



Grantee Quarterly Performance Report (QPR)

The Quarterly Progress Report consists of two reports, the ETA-9153 Form, also known as the Quarterly Performance Report, and the Quarterly Narrative Report.

This module allows RAD System users to perform the following actions:

- Build/Submit the ETA-9153 Form by Authorized Grantee Representative
- Build ETA-9153 Form for view/print by all users (excluding Read-Only users)
- View/Print Submitted ETA-9153 Forms by all users (excluding Read-Only users)

Build or Submit the Grantee Quarterly Performance Report

All users (except Read-Only users) may build, view, and print a Grantee Quarterly Performance Report (ETA-9153 Form). However, only the Authorized Grantee Representative's login password provides access to the Grantee Quarterly Performance Report (ETA-9153 Form) that allows for saving remarks, uploading the Narrative Report and other Supplemental Files (up to four files), and certifying and submitting the entire Quarterly Progress Report with the Authorized Grantee Representative's PIN.

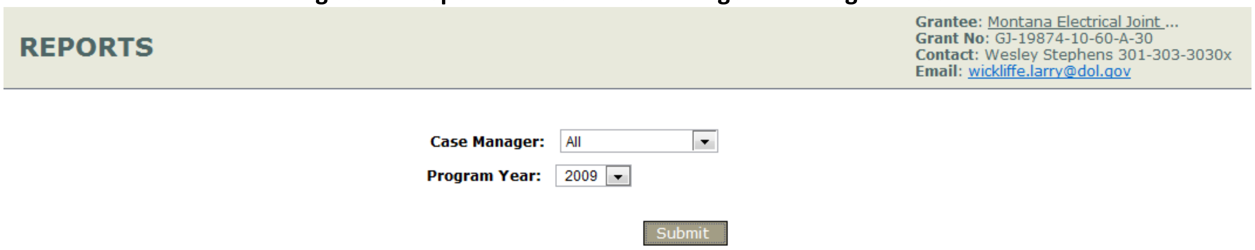
1. Log in to the RAD System as an Authorized Grantee Representative. The system displays the RAD system home page.

2. Click on the **Reports** tab. The system displays the **Reports** page (Figure 81).

3. Click the **Grantee Quarterly Performance Report** link.

4. The system displays the Reports – select Case Manager and Program Year page (Figure 82).

Figure 82: Reports – Select Case Manager and Program Year



5. Select the **Case Manager** and **Program Year**.

6. Click **Submit**.

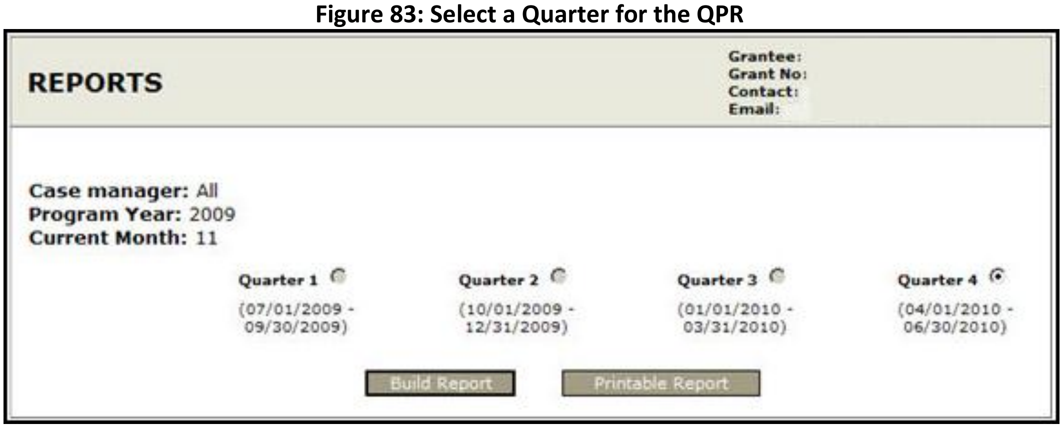
   Note: If a user is not assigned to any participants, the user's name will not appear in the drop-down list.

7. The **Reports – Select Quarter** screen is displayed (Figure 83).

8. Select the quarter for the ETA-9153 Form you wish to build.

   Note: You may build a report for a quarter that has not yet ended, but you may not certify or submit for that quarter until the quarter ends. In addition, you may not select a quarter that is in the future.

Figure 83: Select a Quarter for the QPR



9. Click **Printable Report** to display a Portable Document Format (PDF) version of the ETA-9153 Form (5 pages) that is only for viewing and printing.

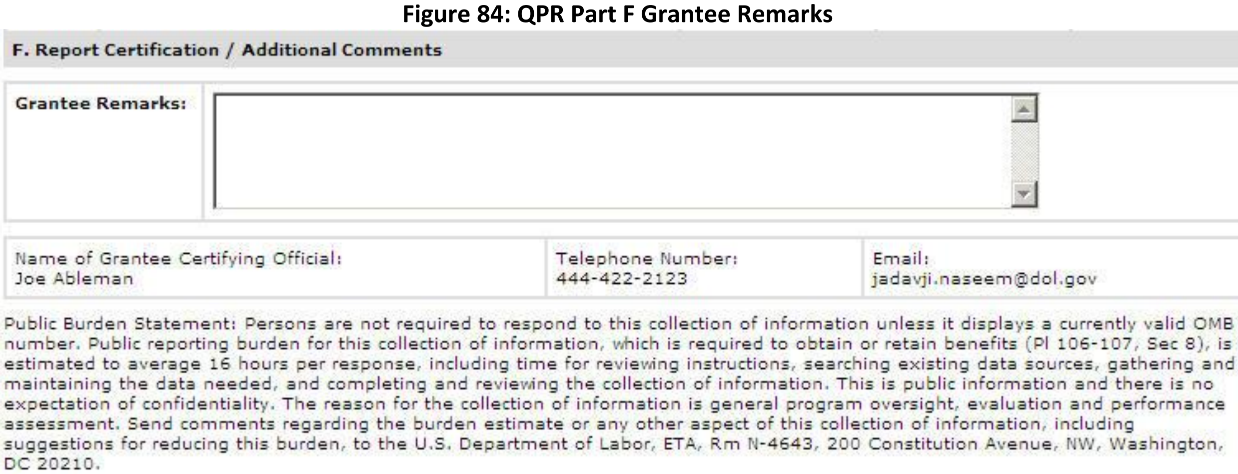
10. Click **Build Report** to display the ETA-9153 Form that can be certified and submitted under the Authorized Grantee Representative's login password and PIN.

11. Please visit http://www.doleta.gov/performance/reporting/pdf/ARRA_HGEI_Std_Qtrly.pdf to view a sample of the ETA-9153 Form.

12. If Build Report is selected, the following actions may be performed by the Authorized Grantee Representative prior to certifying and submitting the QPR:

    - Enter remarks in Section F- Report Certification/Additional Comments (optional) (Figure 84)
    - Upload the Narrative Report and other supplemental files

Figure 84: QPR Part F Grantee Remarks



F. Report Certification / Additional Comments

Grantee Remarks:

Name of Grantee Certifying Official:	Telephone Number:	Email:
Joe Ableman	444-422-2123	jadavji.naseem@dol.gov

Public Burden Statement: Persons are not required to respond to this collection of information unless it displays a currently valid OMB number. Public reporting burden for this collection of information, which is required to obtain or retain benefits (Pl 106-107, Sec 8), is estimated to average 16 hours per response, including time for reviewing instructions, searching existing data sources, gathering and maintaining the data needed, and completing and reviewing the collection of information. This is public information and there is no expectation of confidentiality. The reason for the collection of information is general program oversight, evaluation and performance assessment. Send comments regarding the burden estimate or any other aspect of this collection of information, including suggestions for reducing this burden, to the U.S. Department of Labor, ETA, Rm N-4643, 200 Constitution Avenue, NW, Washington, DC 20210.

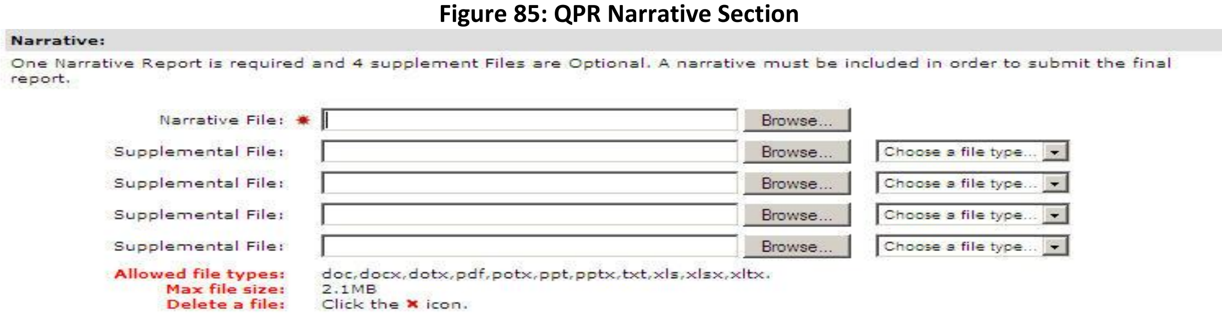
13. To upload the required Narrative Report perform the following steps:

    - Click **Browse** next to the **Narrative File** field (Figure 85).
    - Navigate to the desired document you want to upload. You may upload files in Microsoft Word, Microsoft Excel or Adobe Acrobat (PDF). The maximum file size is 2.1MB.

14. You may upload a maximum of four Supplemental Files (optional) as attachments to the Quarterly Progress Report. Select a file type from the **Choose a file type** list. The file type options are Timeline, Success Story, or Other.

    Note: If you do not select a file type for the Supplemental File, the document will not upload.

Figure 85: QPR Narrative Section



Narrative:

One Narrative Report is required and 4 supplement Files are Optional. A narrative must be included in order to submit the final report.

Narrative File: * Browse...
Supplemental File: Browse... Choose a file type...
Supplemental File: Browse... Choose a file type...
Supplemental File: Browse... Choose a file type...
Supplemental File: Browse... Choose a file type...

Allowed file types: doc,docx,dotx,pdf,potx,ppt,pptx,txt,xls,xlsx,xltx.
Max file size: 2.1MB
Delete a file: Click the ✖ icon.

15. Enter the Grantee's **PIN** and click **Certify** to submit the Quarterly Progress Report (Figure 86).

Figure 86: QPR PIN Field

16. When the Report is submitted, the system displays the following message: **You have successfully submitted the QPR.**

    After a Quarterly Progress Report is submitted, it may still be rebuilt and resubmitted by the Authorized Grantee Representative. The uploaded Narrative File and Supplemental File(s) may be deleted and replacement files may be uploaded.

    To do so, the Authorized Grantee Representative would rebuild the same report, and then click the red **x** next to the beginning of the file name to be deleted (Figure 87). The Authorized Grantee Representative must enter the PIN to recertify/resubmit the updated Report.

Figure 87: QPR with Narrative and Supplemental Files

View and Print a Submitted Quarterly Progress Report

The Quarterly Progress Report (including the attached Narrative Report file and Supplemental files) that have been certified and submitted may be accessed by users for viewing and printing from the Reports window.

Note: This method allows report viewing and printing by all users (except Read- Only users). No changes can be made to the ETA-9153 Form, the Narrative Report, or the Supplemental file(s) through this viewing method. Only the Authorized Grantee Representative has the permission to replace attached files, recertify, and resubmit the report as outlined in the previous section, **Build and Submit the Quarterly Progress Report**. Authorized Grantee Representatives and Administrators will be able to view data on all participants. Area Cases Managers can only see data on participants in their domain, and Case Managers will only see data for their own caseload/participants.

To view and print a submitted quarterly progress report:

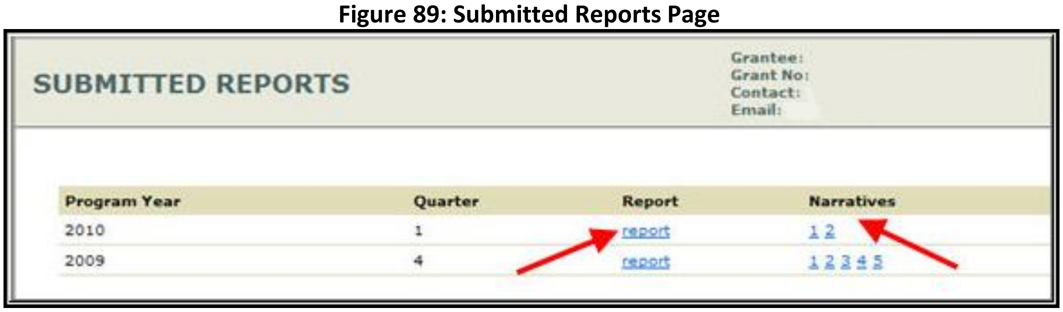
1. From any page in the RAD system, click on the Reports tab. The system displays the Reports page.

2. Click the **Submitted QPR** link in the top left corner of the page (Figure 88).

Figure 88: Reports Window

The system displays the Submitted Reports page (Figure 89), with all submitted reports, along with the program year and quarter the report was submitted.

Figure 89: Submitted Reports Page



1. To view a submitted report, perform the following steps:

   - Click the link for the desired report. The system displays the ETA-9153 Form in PDF format (5 pages) including remarks.
   - Click the print icon on the PDF menu bar to print the report.

2. To view Quarterly Progress Report attachments (for example, Narrative Report and Supplemental Reports):

   - Each attachment is represented by a number in the Narratives column. Click the number corresponding to the attachment you want to display. The Narrative Report is represented by '1' and each Supplemental file is represented by the numbers '2' through '5' depending on the number of attached files.
   - Save the report to the desired location.
   - Open the file to view the report.
   - Print the report from the open file.

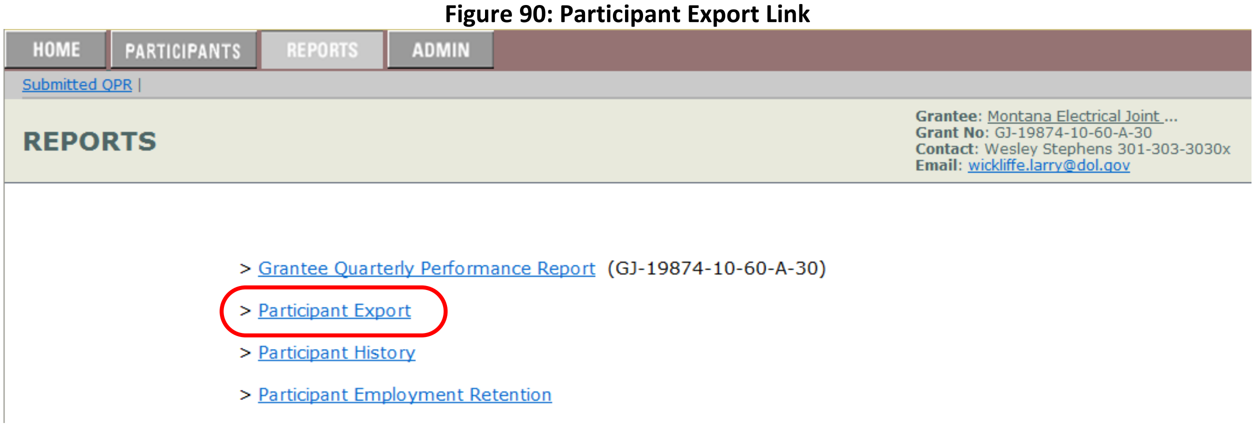
Participant Export Report

All users except Read-Only users may access and run the Participant Export Report. The Authorized Grantee Representative and Administrators may access all participant data. Area Case Managers may only access participant data in their own domain, and Case Managers may only access their own caseload/participants.

1. From any page in the RAD system, click on the **Reports** tab. The system displays the **Reports page**.

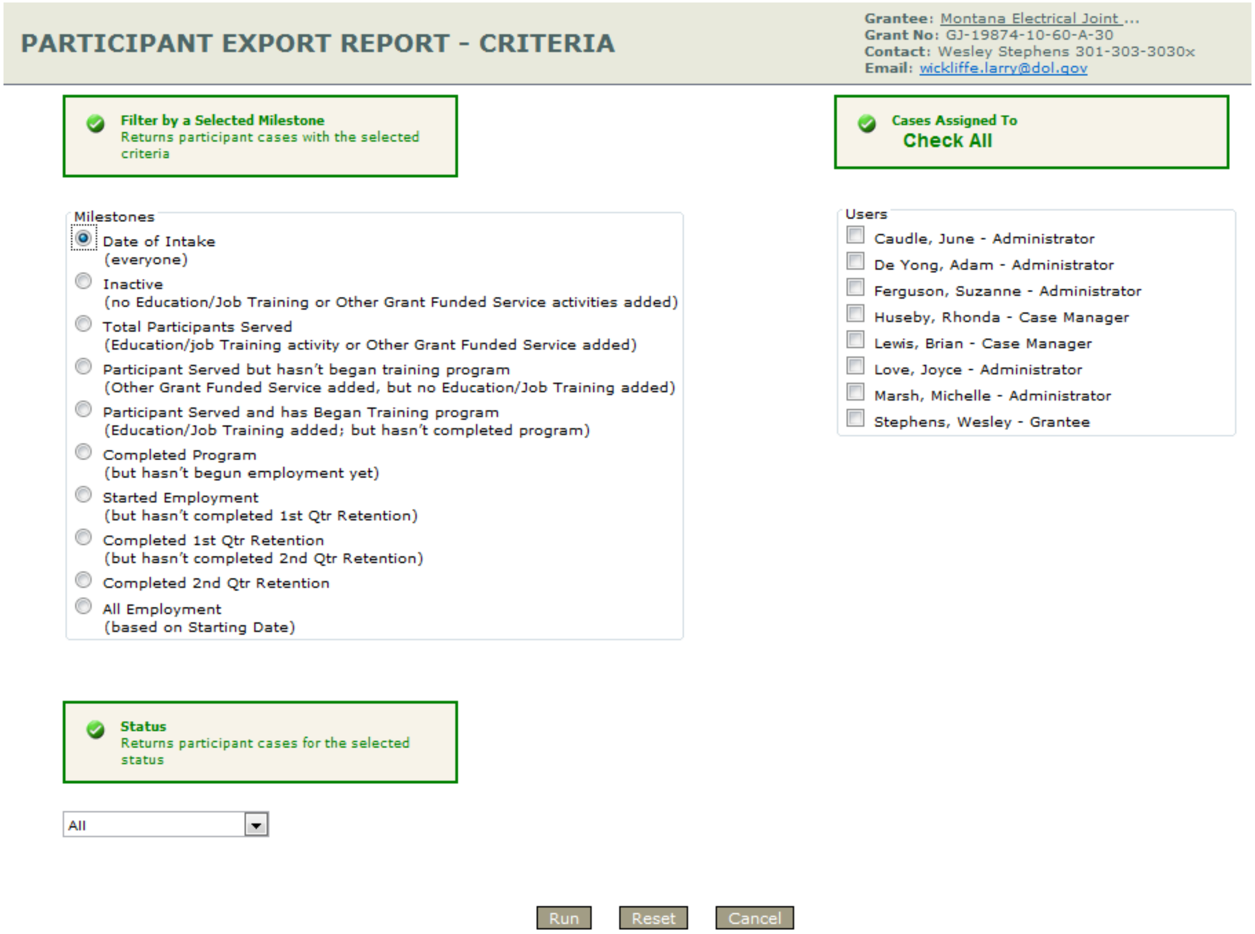
2. Click on the **Participant Export** link (Figure 90).

Figure 90: Participant Export Link



3. The system displays the Participant Export Criteria page (Figure 91).

Figure 91: Participant Export Criteria Page



4. You can filter participant export report by selecting the criteria for which to run your report:

- Selected milestones
  - Date of Intake (everyone)
  - Inactive (no Education/Job Training or Other Grant Funded Service activities added)
  - Total Participants Served but hasn't began training program (Other Grant Funded Services added, but no Education/Job Training added)
  - Participant Served and has Began Program (Education/Job Training added; but hasn't completed program)
  - Completed Program (but hasn't begun employment yet)
  - Started Employment (but hasn't completed 1st Quarter Retention)
  - Completed 1st Quarter Retention (but hasn't completed 2nd Quarter Retention)
  - Completed 2nd Quarter Retention
  - All Employment (based on Starting Date)
- Participant Status
  - Inactive
  - Active
  - Exit

- Case Manager(s)
  - To see only one Case Manager's participants, select the Case Manager by checking the box next to their name.
- To see data on all participants, click the **Check All** hyperlink.

5. Click **Run** to generate the confirmation page for the Participant Export Report. Select the Program Year and Date Selection, organized by Quarter, Cumulative or Date Range.

6. Click **Build Report.** The system displays a window requesting that you click Open to display the Excel report or to save the report as a file on your computer.

7. Click **Save** to save the file to a desired location or click **Open** to view the report.

8. When you click the Open button, the system displays the report in Excel with the following tabs:

   - Participant Information
   - Demographic Information
   - Program Information
   - Training
   - Services
   - Employment
   - Notes

   Each tab consists of information collected on participants that has been input into the RAD system (Figures 92-98).

Figure 92: Participant Information

Participant Information

ID	Last Name	First Name	MI	Address 1	Address 2	City	Zip	State	Phone 1	Phone 2	Phone 3	Email	Date of Birth	Gender	Ethnicity	Race
75658	Hokeman	Tom		123 Elm Street		Rockville	21234	IA	333-222-1234			powelll.andrew@dol.go	01/08/1984	Female	Not Hispanic/Latino	Asian
75659	Posea	Richard	A	123 Elm Street		Quantico	21332	VA	202-123-4123	202-123-4123	410-222-1234	powelll.andrew@dol.go	05/05/1987	Male	Hispanic/Latino	Asian
75660	Slurpy	Slurp		2400 Clarendon Blvd		Arlington	22201	VA	202-693-3674				02/02/1980	Male	Hispanic/Latino	American Indian or Alaska
75677	Applebee	Joe		123 Elm Street		Pinehurst	23821	SC	303-222-1234			powelll.andrew@dol.go	05/07/1991	Female	Not Hispanic/Latino	Asian
75699	Gangley	Jenna		2400 clarendon blve		Arlington	22201	VA	202-693-4560			Jadavji.Naseem@dol.gov	01/01/1990	Female	Hispanic/Latino	Black or African American
75700	Danberry	Ed		2400 Clarendon Blvd		Arlington	22201	VA	202-693-1234			Jadavji.Naseem@dol.gov	01/01/1990	Female	Not Hispanic/Latino	Asian
75703	Pan	Peter		2415 Clarendon Blvd		Arlington	22201	VA	222-222-2222				01/01/1990	Female	Not Hispanic/Latino	American Indian or Alaska
75704	Dance	Waltz		2400 Clarendon		Arlington	22201	VA	222-222-2222				01/01/1989	Not Specified	Not Specified	Asian
75705	Argentine dance	Tango		2400 Clarendon Blvd		Arlington	22201	VA	222-222-2222			Jadavji.Naseem@dol.gov	01/01/1987	Not Specified	Not Specified	Black or African American

Figure 93: Demographic Information

Demographic Information

ID	Demographics
75658	Eligible Veteran
75658	Limited English Proficient
75659	Eligible Veteran
75660	High School Dropout
75677	Eligible Veteran
75699	High School Dropout

Figure 94: Program Information

Program Information

Participant ID	Date Began Program	NAICS Code
5502	02/22/2010	NAICS 23 - Construction
5574	05/10/2010	NAICS 23 - Construction
5579	02/19/2010	NAICS 23 - Construction
5676	02/19/2010	NAICS 23 - Construction
5681	04/12/2010	NAICS 23 - Construction

Figure 95: Training

Training			
ID	Start Date	End Date	Training Activity
75658	10/10/2010	08/08/2011	Apprenticeship Activities
75659	09/08/2011	09/09/2011	On-the-Job Training Activities
75659	09/13/2011	09/13/2011	Classroom Training Activities
75659	08/01/2010	08/30/2011	Apprenticeship Activities
75660	09/06/2010	08/31/2011	Apprenticeship Activities
75660	01/01/2010	08/10/2011	On-the-Job Training Activities
75677	08/01/2010	08/08/2011	Classroom Training Activities
75699	04/03/2011		Classroom Training Activities

Figure 96: Services

Services			
ID	Start Date	End Date	Service Activity
75659	09/01/2011		Job Placement Services
75659	09/01/2011		Assessment Services
75660	09/02/2011		Basic Skills Training
75700	02/03/2011	02/18/2011	Job Placement Services
75700	08/05/2010	01/06/2011	Supportive Services
75703	01/04/2011		Basic Skills Training
75704	08/10/2010	08/10/2011	Case Management Services

Figure 97: Employment

Employment								
ID	Entered Employment	Starting Date	Is Employment Training Related?	Industry at Placement	Green Industry Sector	Employer Name	Job Title	Employment Comments

Figure 98: Notes

Notes			
ID	Date Created	Entered By	Note
75659	09/08/2011	Addison, Sally	Richard Posea is a test participant.
75659	09/09/2011	Hopkins, Latrell	This participant should be exited soon.
75660	09/08/2011	Latrelle, Louis	The intake date for the participant is greater than the date he entered in the education or job training program

Participant History Report

All users except Read-Only users may access and run the Participant History Report. This Report displays a complete, separate history for each participant assigned to the selected user(s). The Authorized Grantee Representative and Administrators may access all participant data. Area Case Managers may only access participant data in their own domain, and Case Managers may only access their own caseload/participants.

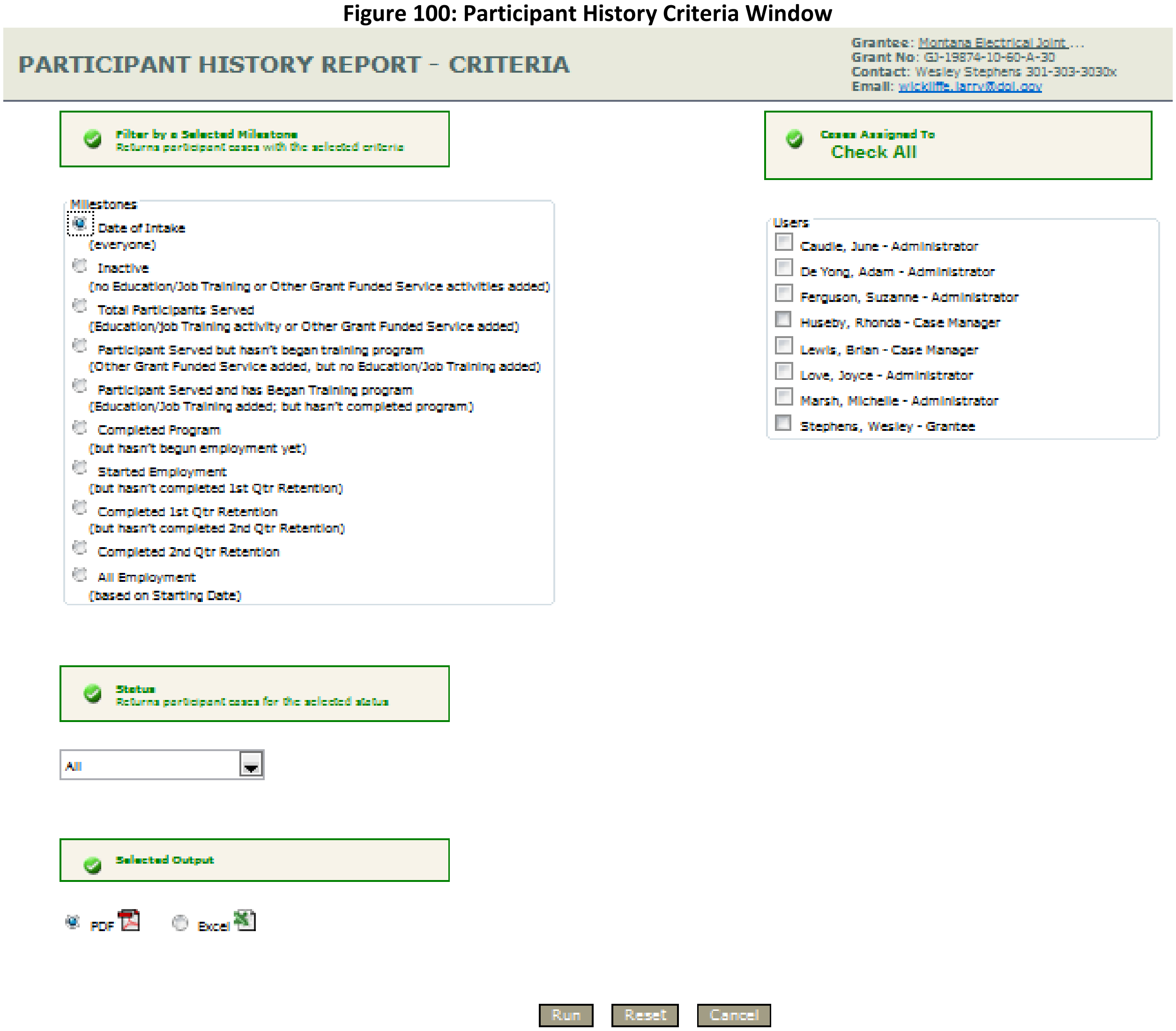
1. From any page in the RAD system, click on the Reports tab. The system displays the Reports page.

2. Click on the **Participant History** link (Figure 99).

Figure 99: Participant History Link

3. The system displays the Participant History Criteria window (Figure 100).

Figure 100: Participant History Criteria Window



4. You can filter participant history report by selecting the criteria for which to run your report:

    - Selected milestones
        - Date of Intake (everyone)
        - Inactive (no Education/Job Training or Other Grant Funded Service activities added)
        - Total Participants Served (Education/job Training activity or Other Grant Funded Service added)
        - Participant Served but hasn't began training program (Other Grant Funded Service added, but no Education/Job Training added)
        - Participant Served and has Began Training program (Education/Job Training added; but hasn't completed program**)**
        - Completed Program (but hasn't begun employment yet)
        - Started Employment (but hasn't completed 1st Qtr Retention)
        - Completed 1st Qtr Retention (but hasn't completed 2nd Qtr Retention)
        - Completed 2nd Qtr Retention
        - All Employment (based on Starting Date)
    - Participant Status
        - Inactive
        - Active
        - Exit
    - Case Manager(s)
        - To see only one Case Manager's participants, select the Case Manager by checking the box next to their name.
        - To see data on all participants, click the **Check All** hyperlink.
    - Selected Output
        - Click on the button to select PDF or Excel for your generated reports.

5. Click **Run** to generate the confirmation page for the Participant History Report. Select the Program Year and Date Selection, organized by Quarter, Cumulative, or Date Range.

6. Click **Build Report**. The system displays a window requesting that you click Open to display the report or to save the report as a file on your computer.

7. Click **Save** to save the file to a desired location or click **Open** to view the report (Figure 101).

Figure 101: Participant History Report

Participant History Report

9 Participants

As of 09-28-2011 12:02 PM

		Tom Hokeman (Participant ID: 75658)
Participant Status:		Active
Intake Date:		09/08/2011
	Address	123 Elm Street Rockville IA 21234
	Gender	Female
	Ethnicity	Not Hispanic/Latino
	Race	Asian
	Education	High School graduate or equivalent
	Birth Date	01/08/1984
	Age at First Grant Service	26
	SSN Entered	No
	Demographic	Eligible Veteran; Limited English Proficient;

Training Information

Training Name	Start Date	End Date
Apprenticeship Activities	10/10/2010	08/08/2011

Service Information

Service Name	Start Date	End Date

Program Completion and Credential Information

Has Participant Successfully Completed The Program?	Completion Date	Attained Credential	Credential Type	Additional Credential
Yes	09/09/2011	Yes	Certificate	Yes

Employment

Entered Employment	Starting Date	Employment Training Related	Industry	Green Industry	Employment Retention
No information	n/a	n/a	n/a	n/a	1Q: No information 2Q: No information

Exit

Exit Type	Exit Date	Exit Reason
n/a	n/a	n/a

Participant Employment Retention Report

All users except Read-Only users may access and run the Participant Employment Retention Report.

This Report displays a complete, separate history for each participant assigned to the selected user(s) to track 1st Quarter and 2nd Quarter Retention information. This will allow the grantee to identify all participant files that require follow-up activities to track retention information.

The Authorized Grantee Representative and Administrators may access all participant data. Area Case Managers may only access participant data in their own domain and Case Managers may only access their own caseload/participants.

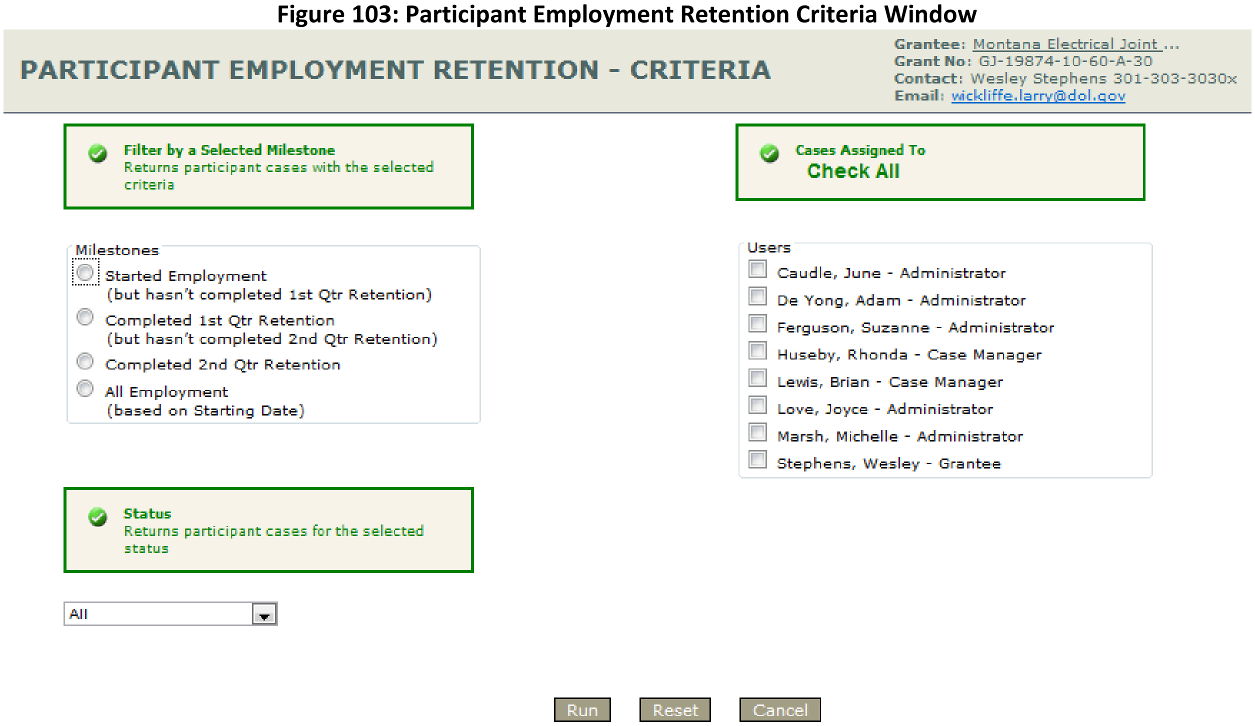
1. From any page in the RAD system, click on the Reports tab. The system displays the Reports page.

2. Click on the **Participant Employment Retention** link (Figure 102).

Figure 102: Participant Employment Retention

3. The system displays the Participant Employment Retention Criteria window (Figure 103).

Figure 103: Participant Employment Retention Criteria Window



4. You can filter participant employment retention report by selecting the criteria for which to run your report:

- Selected Milestone
  - Started Employment (but hasn't yet completed 1st Qtr Retention)
  - Completed 1st Quarter Retention (but hasn't completed 2nd Qtr Retention)
  - Completed 2nd Qtr Retention
  - All Employment (based on Starting Date)
- Participant Status
  - Inactive
  - Active

  - Exit
- Case Manager(s)
  - To see only one Case Manager's participants, select the Case Manager by checking the box next to their name.
  - To see data on all participants, click the **Check All** hyperlink.

5. Click **Run** to generate the confirmation page for the Participant Employment Retention Report. Select the Program Year and Date Selection, organized by Quarter, Cumulative or Date Range.

6. Click **Build Report.** The system displays a window requesting that you click Open to display the Excel report or to save the report as a file on your computer.