

Training Grant Updates

June of 2018

Central Office Staff

Department of Workforce Development



June Study Hall
June 25 and June 28, 2018

Training Grant Changes and Updates



- Over the past year, we have collected feedback from DVR and FAO offices to identify what changes and improvements we needed to make for 2018-2019 and beyond.

Student Type-SFY 2018	Number
Technical College	900+
4 year College/University	500+
Graduate	45+

Training Grant Changes



- The changes include several label changes and reorganized fields.
- The calculations will now limit funds to a per term maximum based on actual credits for a part-time student or up to \$5,000 - financial aid per year for a full-time student.

Training Grant Changes



- Summer school will have automated locking and functionality.
- There have been helpful InfoNote additions to provide more information at a touch.
- There is now a training grant form in IRIS for schools outside of the WI systems and out of state.

Training Grant Form Changes



- Changes will be in IRIS on Friday, June 29.
- DVR Staff should not enter Training Grants until Monday, July 16.
- FAO Staff will be updating their information in the FAO Portal from July 2 – July 13.

- There are no new *policies*:
 - Remember, it is a per credit calculation, so semester amounts may differ depending on amount of credits.
- Language being clarified in documents:
 - Consumers receive the calculated DVR Unmet Need, *not to exceed* \$5,000/academic year.

- Consumers must apply for a FAFSA in order to qualify for a DVR training grant:
 - A FAFSA must be completed even if the consumer knows they won't qualify for financial aid.
 - If a DVR Unmet Need is "\$0", the consumer should complete and submit an exception request FIRST. If the exception request is denied, then they can file an appeal.

- Summer school:
 - Still follow the summer school policy:
 - https://dwd.wisconsin.gov/dvr/trg_grant/summer_school_and_work_activities.pdf
 - An exception request must be used if the consumer requests funds beyond their DVR Unmet Need and/or beyond \$5,000.

- Reminders:
 - Inform consumers that training grants are not meant to cover the entire cost of their attendance, but serve as assistance.
 - If a consumer requests to attend a private or out-of-state school, utilize the administrative review process.

- Reminders
 - Administrative review: Director and/or supervisor reviews casenote about request.
 - If denied, consumer can still attend the out-of-state/private school if they agree to accept the \$5,000/academic year cap and not file an exception request for more funds.
 - As always, appeal rights should be given to the consumer.

- School Year Drop Down choices' order will switch on July 1st of every year.

❖ 2018-2019 will become the default on July 1st of this year. 2017-2018 will still be available.

Start of the
new School
Year:

2017-2018
2018-2019
2019-2020

School Year Page (Continued)



- In System School Drop-Down List:
 - ❖ Staff need to select yes or no (doing so will limit the drop-down list results to make it easier for staff to find the correct school).
 - ❖ There is no FAO Portal involvement for Out of System Schools.

In System School?: Yes No

School:

Campus:

- In System/Out of System Examples
 - ❖ In system schools include Wisconsin based schools: UW System, Wisconsin Technical College System and the Wisconsin Association of Independent Colleges and Universities (WAICU)
 - ❖ Out of system schools such as University of Minnesota, Gallaudet.

- Correct Student ID Required InfoNote added.
- Graduate School Field:
 - ❖ Staff will be able to update this field on the School Information tab until there is Fiscal Activity on the Training Grant (PO Created or Exception).

School Info Tab (Continued)



- Release Statement Added to Training Grant Form in IRIS by signature date (will print if the page is printed).
 - ❖ Increase zoom on tablet if the language needs to be enlarged.
- The "Close Training Grant" button has moved to the General Information Tab.

School Info Tab (Continued)



- Term Summary Grid on School Information Tab updated:
 - ❖ Columns added and order changed (follows calculations).

Term Summary

Term	DVR Cost of Attendance	Resources	DVR Unmet Need	DVR Training Grants Paid	Census Date
Term 1	\$4,907.00	\$3,816.00	\$1,091.00	\$1,091.50	9/19/2016
Term 2	\$4,907.00	\$3,815.00	\$1,092.00	\$0.00	2/7/2017
Summer - Term 3	\$0.00	\$0.00	\$0.00	\$0.00	6/25/2017

Status Info Tab



- Direct link to [Training Grant Status Reminders](#) document added.
- The Status Changed by Field issue has been corrected and will show the DVR Staff Member who last updated the form (in the past it would show the current logged-in user).
 - ❖ Note: Status History belongs to the form; unlocking a Term will create a new form (and the original form shows up as Obsolete in the Related Forms section of the School Information Tab).

Status Info Tab (Continued)



- Status Change History – Term Column Added:
 - ❖ All new training grants will show the terms.
 - ❖ Only changes to terms after the deployment on 6/29/18 will be reflected on old training grants.

Term Tabs



- Student/Parental/Family Contribution Required field renamed.
- A Purchase Order cannot be approved if the Grades Received/Attached, Date Grades Received, and Schedule Received/Attached are not filled out on the current Term's tab.
- InfoNote added alerting staff that Exceptions should only be entered for a Term (not the entire year).

Term Tabs (Continued)



- FAO Cost of Attendance, DVR Cost of Attendance, and Resources Totals fields added.
- Staff can hover over the 4 tooltips to see how the calculations are working.

DVR Training Grant Information	
FAO Cost of Attendance Total:	0.00
DVR Cost of Attendance Total:	0.00
Resources/Financial Aids Total:	0.00
DVR Unmet Need:	0.00

DVR Unmet Need:
Calculated by subtracting the Resources/Financial Aids Total from the DVR Cost of Attendance:
• DVR Cost of Attendance - Resources/Financial Aids Total = DVR Unmet Need

Calculations



- Calculations code modified. Currently, in production, the amount that we offer is not limited to anything per term (only \$5,000 per school year).
- This change/deployment will limit training grants to \$2,500 maximum per term; if the school offers 3 terms, the maximum would be \$1,666.04, etc.
 - ❖ We provide up to \$5,000 minus financial aid and resources per academic year (unless an exception is requested/approved).
 - ❖ Anything less than full-time per term is calculated on a per credit basis.

Calculations Example



- Fall semester 12 credits = \$2,500
 - Spring semester 6 credits = \$1,250.04
 - TOTAL amount offered = \$3,750.04
-
- ❖ Spring Semester amount of \$1,250.04 is 6 credits x \$208.34.
 - ❖ Semester Training Grant Offered Amount equals the lesser amount of the Amount Calculated or \$2,500.

General Updates/Changes



- Training Grants and Closed Cases:
 - ❖ At the time of closure, previous training grants started will be closed automatically by IRIS. Any training grants in draft status will be deleted.
 - ❖ Staff will not be able to update training grants after closure; however, IRIS System Administrators will be able to make adjustments if needed.
 - ❖ Cannot add a new Training Grant in a closed case.
- DVR Staff Directory link added to FAO Portal.

General Updates (Continued)



- Emails to FAO Portal Staff for New Training Grant

Forms:

- ❖ Whenever "Submit Form to FAO" is clicked on the Training Grant Form, if the "Send Emails When New Forms Routed" checkbox is checked on the FAO Personnel Page, IRIS will generate an email to everyone that is a Registered User for School/Campus.
- ❖ In the past, FAO Portal Staff were receiving emails for New Messages.

Send Emails when new Message received:

Send Emails when new Forms routed:

Future Enrolled Dates



- Can enter dates up to 3 months in the future for Training Grants and Education/Training Entries.
- Future dates will not be reported on the RSA 911.
- Staff will receive an "Education Training Review Alert" after the future date entered has arrived.

Draft Flag



- Used for reporting purposes – more accurate reporting. We only report on education/training when we know the student is actually attending.
- Different than the Status Information Tab "draft" status.
- Does not appear on Training Grant Forms (Behind the Scenes).
- Checkbox present on Education/Training Type Entries. "Draft" checkbox is automatically checked if a Future Enrollment Date is entered. Will show as "Education Training Not Active" on Education/Training Work List.

Draft Flag (Continued)




- Staff will need to manually uncheck the "Draft" checkbox when the Education/Training has begun and DVR wants to report it to RSA.
- If consumer did not attend school, staff can delete the Education/Training Type.

Education/Training Details

Type of Education/Training

Provider

Enrolled Date (Date
Classes Start):



Draft:



(Allows entering an Enrolled Date
in the future.)

Education/Training Module Grid



- Training Grants to Postsecondary Schools for the same degree only show up once for subsequent years on the Education/Training Module grid.
- Anything related to an Education/Training Type is on one page, and staff will not need to enter Graduation/Withdrawal Dates multiple times for the same Credential.
 - ❖ Attachments and MSGs related to Education/Training Type are pulled forward.

Continue Existing School Button



- This button is only enabled if there is a existing training grant/school entered that is not in draft status.
- Drop-Down List will include prior schools/years.
- Enrolled Date is pre-filled.
- Consumer will need to sign the form again; they need to sign Training Grant forms every year.

Continue Existing Schooling Button



Training Grant Summary Information

Training Grant Summary

Academic Year	Total DVR Funds	Credits Earned	Credits Attempted
2018-2019	\$2,083.40	0	20

[Add School Year](#)

[Continue existing schooling](#)

If the consumer is continuing a program from a past year at the same Campus use the Continue existing schooling button, if the consumer is starting a new program or changing to a new Campus use the Add School Year button.

[Close](#)

Add a Continuing School Program

Continuing School:

MADISON AREA TECHNICAL COLLEGE: MADISON AREA TECHNICAL COLLEGE (2018 - 2019)
UW SYSTEM: SUMMER BEGIN (2018 - 2019)

School Year:

[Save](#)

[Cancel](#)

Out of System Training Grants



- Field staff should gather the cost information and financial aid information from the consumer.
- Field staff will be entering in all of the data (costs and resources) and completing the process using the Training Grant Module in IRIS.
- There is no FAO Portal involvement for these Training Grants.
- Staff must relay the information to Central Office Staff via the DWD MB DVR FAO Mailbox if the term configuration is not 2 Terms or if a school is not included in the drop-down menu.

Out of System Trg Grants (Continued)



- When completing the form in the Training Grant Module, the status will jump from Blank TG w/ Signature to Waiting for PO Payment Status.
- Payments will not be Expedited and the individual school will need to submit an invoice to DVR for payment.

Add a new School Year

Social Security Offset:

Additional Living Expenses in IPE:

Start of the new School Year:

In System School?:

School:

Campus:

Out of System Trg Grants (Continued)



- A PO will need to be sent/mailed to these schools. Visual cue for staff in IRIS; the PO will not be paid until an Invoice is submitted to CCP.

This training grant does not have any in system registered FAO Personnel.

- For POs created from Out of System Training Grants, they will be suppressed from the DVR Finance (CCP) Training Grant Work Lists. They will show up on the Education/Training Work List for other DVR Staff.

Summer School



- A pop-up box will appear only for those schools when the Summer School is indicated to be at the Start of the School Year.
- If staff select "no" (consumer will not be attending summer school), Summer – Term 1 tab will automatically be locked by IRIS and Training Grant will be advanced to Term 2.

First Term is Summer School

Is Yes
Consumer No
Attending
Summer
School?:

[Continue](#)

Summer School (Continued)



- Can still unlock/lock this Summer – Term 1 if needed.

DVR Training Grant Information Summer - Term 1		
FAO Cost of Attendance Total:	0.00	?
DVR Cost of Attendance Total:	0.00	?
Resources/Financial Aids Total:	0.00	?
DVR Unmet Need:	0.00	?
Total DVR Training Grant Offered:	0.00	
Social Security Offset:	0.00	
DVR Funds Due to Approved Exception:	0.00	<input type="button" value="Add Excep"/>
	Exceptions	
Total DVR Funding Offered:	0.00	

Unlocking the Term will discard any changes made so far and create a new form.

[« Previous Tab](#) [Next Tab »](#)

- If attending summer school, the consumer may get more than \$5,000 for the entire year (with an exception).
- Process still in place - https://dwd.wisconsin.gov/dvr/trg_grant/summer_school_and_work_activities.pdf

Exceptions and SSI/SSDI Offset



- Exceptions should only be entered for a Term and done within the Training Grant Module.
- The exception is the amount requested above and beyond the Total DVR Training Grant Offered.
- 2018-2019 school year is the last year for SSI/SSDI Offset.

Additional Living Expenses



- ❖ If Additional Living Expenses is checked Yes, staff need to make sure that an exception is not needed.
 - ❖ Does the Total DVR Training Grant Offered equal the Unmet Need?
 - ❖ If the term is capped at \$2,500 and additional funds are needed for Additional Living Costs, an exception is needed.
 - ❖ Administrative Review is being used to ensure consistent practice.

Add'l Living Expenses (Continued)



- In this scenario, we would need to request an exception for \$1,266.60 (\$3,350 DVR Unmet Need – DVR Funding Offered \$2,083.40).

DVR Training Grant Information Term 1		
FAO Cost of Attendance Total:	3,350.00	?
DVR Cost of Attendance Total:	3,350.00	?
Resources/Financial Aids Total:	0.00	?
DVR Unmet Need:	3,350.00	?
Total DVR Training Grant Offered:	2,083.40	
Social Security Offset:	0.00	
DVR Funds Due to Approved Exception:	0.00	Add Exception
	Exceptions	
Total DVR Funding Offered:	2,083.40	

Training Grant Reminders/General Info



- DVR Staff should not enter Training Grants until Monday, July 16.
- Please report all issues to the FAO Training Grant Mailbox – DWD MB DVR FAO.
- Still should fill out Cost of Attendance (COA) for entire school year – realizing that changes/updates can be made.
- Graduation/Credential Attained & Withdrawal Dates need to be entered via the Education/Employment Module; staff will want to make sure that the Highest Level Enrolled field is updated as well.

General Info (Continued)



- For RSA reporting purposes, purchase orders will be split into separate lines if needed.
- This will occur when the Training Grant offered is more than the first two lines of the Cost of Attendance Budget (Tuition and Fees & Books and Supplies) listed on a Training Grant Form, IRIS automatically creates a 2nd Line to the Purchase Order automatically to be coded to Maintenance (Activity Code 027).
- Related Training Grant documents will be updated and posted by July 16 -
https://dwd.wisconsin.gov/dvr/trg_grant/default.htm.

General Info (Continued)



- There is no history of FAO Changes, and staff do not receive an Alert. If FAO changes amounts, the dollar amounts are zeroed out and recalculated when the IRIS Staff Member opens up the Form.
- FAO Offices are being asked to send a message to alert DVR Staff of the change.

General Info (Continued)



- Add PO Button:
 - ❖ Once the users click the Add PO button, it automatically Locks the Term and moves to the next Term (status is set to Blank TG w/ Signature).
 - ❖ If it is the last Term of the School Year, it automatically sets the Training Grant status to Completed/Closed.
 - ❖ This information has also been added to the Training Grant Status Reminders webpage - https://dwd.wisconsin.gov/dvr/trg_grant/tg_status_reminders.htm

Non-FAO Schooling



- Non-FAO Schooling will continue to be handled via a separate Purchase Order (not in the Training Grant Module in IRIS) -
https://dwd.wisconsin.gov/dwd/publications/dvr/pdf/dvr_18319_p.pdf
- Staff should split out the costs on the Purchase Order into 2 lines (following the same rationale in Bullet #6 in the Training Grant Reminders/General Information section above). More lines should be added if there are other costs included that have different coding (Example - Equipment).

Education/Training Work List



- Education/Training Work List: Renamed from Training Grant Work List.
- Includes both Secondary and Postsecondary now.
 - ❖ What appears on this work list has changed. In addition, it's a collapsed menu so that staff can decide what they want to see.
- List is collapsed; staff will need to click on Check All to see details.

- Snooze Button
 - ❖ Since this is a work list and you probably don't want to look at everything every single day, this new functionality has been built in.
 - ❖ Fiscal items and work items related to a closed case cannot be snoozed.
 - ❖ All Snoozes set at 30 days except for "Education Training Enrolled Not Complete" (this Work Item is snoozed for 3 months).
 - ❖ Based on the case and who is logged in. Same work items for the same case will be snoozed.

Snooze Button (Continued)



- If I'm a Delegate for someone else, their Work Items will show up on my list and I can snooze their work items, but it won't affect their Education/Training Work List.
- Cannot "un-snooze" so be sure to be picky about what you snooze.
 - Tip: If you want to see what you snoozed, you can have someone else look at your list.
- If not seeing all columns, may need to reduce your zoom/view on the screen.

Work Item Types



Signature Missing:

Training Grant form not yet signed.

Purchase Order Needed (snooze not allowed):

Form waiting for staff to create a PO.

Schedule Needed:

Schedule not yet received for a term that has activity.

Grades Needed:

Grades not received for a current or past term where DVR provided funding.

Send to College:

Training Grant Form waiting to be sent to the FAO College.

Work Item Types (Continued)



Purchase Order Returned (snooze not allowed):

A PO for a Training Grant has been sent back to a staff person for any reason.

Documentation Missing Checkbox Checked:

Documentation Missing checkbox checked on the Education/Training page.

Education Training Enrolled Not Complete:

An Education/Training record has a Start Date but no Credential Attained/Graduation or Withdrawal Date filled in.

Education Training Not Active:

Education/Training record marked as Draft.

Work Item Types (Continued)



Previous Student Missing Form:

A student that DVR provided a Training Grant to in the past year -- but doesn't have one created for the next year yet.

Future Enrolled Date Passed (snooze not allowed):

An Education record has a Future Enrolled Date that is in the past -- either needs to be made active or reset to a new future date.

Training Grant PO with School Not in System:

These are POs that are to Out of System Schools that need to be printed and sent to the college to trigger an Invoice be sent to DVR. Suppressed from the CCP staff members' work lists.

Miscellaneous IRIS Change & Reminder



- Employer Name Now Required on Employment Page and Status 26 Closures:
 - ❖ Not an RSA 911 Data Element (wasn't required before).
- IRIS will be going read only at 7:00 PM on the last business day of the month. This will assist with RSA 911 Reporting regarding Services provided.
- Note: IRIS will be read only at 5:00 PM on June 29 for end of state fiscal year updates.

Questions?

Email any FAO Training Grant
Questions or Issues
to DWD MB DVR FAO

