**WorkforceGPS**

**Transcript of Webinar**

**TAACCCT Performance Reporting Q&A:**

**May Topic: Exit Scenarios for Reporting Outcomes across Multiple Years**

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JONATHAN VEHLOW: (In progress) – comments, concerns at any time. Welcome to TAACCCT performance reporting monthly series, May 2017. Without further ado, I'd like to turn things over to our moderator today, Cheryl Martin, program manager, TAACCCT grants, U.S. Department of Labor, Employment and Training Administration. Cheryl?

CHERYL MARTIN: Thank you. And welcome, everybody. We really appreciate you coming on board for these kind of let's-dig-into-the-weeds sessions, because that means that you'll have a much higher likelihood of being able to turn in your information correctly. And we know that it means that you're really concerned about doing that accurately, so we really appreciate that.

We know that many other people are also concerned about that, and that they will either listen to this or check it out later.

I want to say that I appreciate the work that Kristen and Scott have done to pull this together. They've put a lot of effort into this. And so without further ado, I'm going to turn it over to Kristen.

KRISTEN MILSTEAD: Thank you, Cheryl. Hello, everyone. I'm here today with Scott, and he and I are going to be doing some things a little bit differently for you today.

Before we get to the actual presentation part, just a few reminders here. Scott, if you want to just remind everybody about the digest and resources?

SCOTT ESTRADA: Yeah. So I know you're all very familiar with the TAACCCT CoP – community of practice. Hopefully we'll drilling this enough, is the best way to get communications from the community of practice is to sign up for the TAACCCT weekly digest. This is an opt-in system, not an opt-out. So even if you're a member of the community, it does not mean that you are receiving the weekly e-alerts that will come out – that come out Tuesday mornings.

So to do that is to get into your member profile and on the membership directory tab and click on the little box next to the TAACCCT learning network. And that way, you will start to receive our e-alerts, which is any sort of new news that's getting uploaded to the TAACCCT CoP.

I also want to point to the TAACCCT performance reporting key resources. This is like my home page on my browser because it's just, like, the go-to place for all things related to TAACCCT performance reporting. At the very top is the OMB reporting package, but also any of these lovely TA resources that Kristen has been putting together over the years.

Lastly, I just want to make a reminder that not all of you necessarily received a data validation letter asking for a specific action item. You all would have received some sort of letter. For those of you that did receive one that requested an action item and have not done an action item – or you have not – that hasn't been resolved yet, just a reminder that that's something that we ask that you try to resolve as quickly as possible.

I know some of you have open APRs and are working on it now, or you're waiting on a response from me. Or you've already done it, so thank you very much. But if you have any questions about that or you're like, what's a data validity letter, then feel free to just email the TAACCCT mailbox and I'll be happy to help.

So with that, I will hand it over to Kristen.

MS. MILSTEAD: Thank you, Scott. As you know if you've attended before, and I think many of you have, we generally do this in three separate parts. The first part is we take the questions that have come in and go through those first. And then the second part is we go over a special topic for the month.

And today's topic is going to be just really taking a deeper dive into completion and exit. And in order to do that, we're going to be looking at, of course, the definitions of those, but also how they work together and what that means in terms of how and when you count the outcomes. And then Scott and I are going to be working together to roleplay some scenarios for you.

So hopefully – we'll see how that goes. Let's see how much time that leaves for some questions at the end. Hopefully it leaves us with some questions. I think it probably will. But if not, I'll – first and foremost, the purpose of these is for you to submit your questions all month long and send them in. So if there isn't a lot of time here at the end and you have submitted questions and we don't get to your question today, we will be addressing it. And we encourage you to always send your questions in all month long to us.

OK. So I'm going to go ahead and get started with the question section.

The first question for today is about B.4. And if you'll recall, B.4 is the outcome – so the total number of participants retained in other education programs. And so the question was, "If a participant attends a TAACCCT grant funded program in year 2, and then enrolls in a non-grant funded program in that same year, their status is reported in B.4 in the year 2 APR. Do we stop reporting this status after the year 2 APR?"

So the answer to this question is yes, with the caveat – with the exception of B.10. For incumbent workers, you will always track – once they're enrolled, you will always track whether they receive a wage increase through the end of your period of performance. So that's what that little asterisk means. So that's what B.10 – B.10 is the total number of participants – let's see. Hang on. (Inaudible) – total number of participants included in enrollment who receive a wage increase. So other than that, the answer is yes.

So B.4 is a reporting exit point – what we call a reporting exit point for tracking purposes. So what that means is once you place a participant into that category, you no longer need to track them for anything. They only belong in B.4 if they didn't complete any TAACCCT program. You're placing them into that category because, well, they left a TAACCCT program and they went on to something else at the university. They're not an exiter; they're still there enrolled with the institution, they just hadn't left. But if they didn't complete a TAACCCT program, there's nothing else you need to track for them.

But also keep in mind that if they do come back to a TAACCCT program later, you can't re-enroll them again as a unique participant.

So there was a follow-up question for this. So this is the same participant from the previous question. What if that participant remained in the non-grant funded program throughout year 3? Do you count them again in B.4 in year 3? So the answer would be no, because once you counted them in B.4 the first time as being retained in a non-grant funded program, you're no longer tracking them anymore. So you no longer need to track or report what they're doing for TAACCCT purposes in terms of where they might go.

So you wouldn't – theoretically, you wouldn't even have that information to input anyway, because once they're placed in that category, in subsequent years you wouldn't have to worry about where they – what outcomes that individual would fall into. So this just basically sums up the response to that.

And again, just to point this out, the exception is always going to be B.10. If that participant was an incumbent worker, you're going to continue to track them for a wage increase.

All right. Question number three. This is a very good and interesting question because it's very relevant for many of you right now who are – just exited your program activities extension and may be thinking about things like this. And it also pertains very much to the topic that we're covering today. So I'm going to go ahead and answer this question here right now just in brief, and then we're going to go into much more detail about it later.

So the question is, "If an unemployed participant completes a program and exits the institution in May 2018 – for example, they graduated with a degree – and enters employment in July 2018, their post-March 2018 data cannot be counted in B.2 through B.6 – for example, completion and credit hours and credentials. But can their employment data be counted in the B.8 entered employment performance outcome?"

So the answer here is yes, but there's a very important caveat that I wanted to make here. And this is – we're going to get into this much later. Because the question – I want to make this very, very clear here. It's theoretically possible for this to happen, but in this case it's not possible to tell without knowing whether or not it was this person's first credential – first completed credential.

And the reason why that's important is because the completion date itself is not relevant to triggering follow-up outcome status. That's not the thing where you actually start tracking the follow-up outcomes. As long as the participant completed at least one program that was paid for with grant funds, they can be counted in B.8. But if the program itself is not completed before their program activities extension ends, then they would not be considered a completer.

So in this case, if this is not the first program that they have completed, then you wouldn't count them. But if it is – for example, this question was stating if this was a degree – if they had – if this is a stackable program and they had been completing certificates all along, for example, and this was not their first program, then they could be counted. Their follow-up outcomes would be counted, but not until after they exit.

So the key is, as long as they complete at least one program that was paid for with TAACCCT funds, they could be counted in B.8 as applicable but you have to pay attention to the exit date before that clock starts ticking. What they're doing after that is not important. So the exit doesn't have to fall in program activities – before the program activities deadline ends, but completion does.

All right. And our next question is about wage increase for incumbent workers, B.10. "Does an incumbent worker have to complete a program before they can be counted as having received a wage increase? Do they have to exit the institution to be counted?"

Neither of those is true. An incumbent worker only needs to enroll in a TAACCCT funded program to be counted in B.10. They don't have to complete it and they don't have to exit the institution. And we ultimately – (inaudible) – are going to exit at some point, but what that means is you don't have to wait to count them until they exit. You don't have to wait to count them until they complete. They don't have to complete at all.

The idea is that incumbent workers sometimes just come and enroll in an individual course, maybe to enhance their skills or at an employer's urging; maybe the employer pays for it. And then that ultimately leads them to get a wage increase. And so B.10 is a place to capture that. So they don't actually have to complete a program in order for them to be counted in B.10 if they receive that wage increase.

All right. And question five about counting credit hours. And this is actually not B.10; this is actually about B.5. It says B.10; it's actually B.5. "May we count all credit hours that the participants have earned if they are working toward their associate's degree that is a TAACCCT-funded program? Or do we count the classes that were funded through the grant?"

OK. So you would only count credits from courses that are specifically touched by grant funds. So there has been some original – I guess, some confusion around this. The language that was in the original OMB package was somewhat ambiguous; it depended on how you read the phrase "grant funded" in the definition, whether you applied it to program or credit hours. But the updated OMB package did clarify that these are supposed to be grant funded hours only.

The outcomes are designed to measure sort of what did TAACCCT pay for? So this question is asking about how many TAACCCT hours – TAACCCT-funded hours themselves did students take? Or how many students took actually grant-funded hours? Not how many students overall – or how many credit hours overall did they take at your institution, whether they were TAACCCT-funded or not.

OK. This is all of our questions that we received in advance this month. If you had follow-up to those, or if they made you think of other things, please type in your questions into the box.

And we're going to move along to the second portion of the – sorry, second portion of the webinar in just talking about our topic for today, which is completion and exit.

And the first way to really get started on that is just talk about some basic definitions, because understanding how to count – almost all the outcomes require understanding how completion and exit may coincide with each other. When somebody completes the program of study may or may not coincide with their exit from the program.

So the OMB package defines a program of study as when all the credit hours required for the first certificate or degree are completed. So what that means is even if participants remain at the institution to enroll in other courses or certificates or degree programs, as long as they complete at least one credential, they are a completer. And when they complete that first credential, even if they're completing multiple credentials, they are a completer.

And that may be different than how your institution envisioned it when you wrote your statement of work or how your institution normally defines completers at all, much less in a TAACCCT program. But for TAACCCT reporting purposes, you would want to think of it in terms of something a little bit like a ladder.

This is more like a stackable way to think of it – stackable credential program, where if you have – if you think of each of the credentials as being rungs on the ladder, where somebody's maybe trying to get to the top, there's a larger degree they may be trying to attain, where in the middle there's smaller chunks they can achieve before they get to the top.

The first certificate or degree that they attain makes them a completer for TAACCCT reporting purposes. So you don't have to wait until they get all the way to the top to count them in your annual report as a completer. Once they reach that very first rung, they're a completer for TAACCCT purposes.

But that really sets up some kind of interesting dilemmas, though, when you're thinking about how to count people in the outcomes the rest of the time, while they're there or not, especially if they don't exit at the same time while they're completing.

So when does exit actually occur? When a participant is no longer enrolled at the college. So again, that's independent of completion. It may or may not have anything to do with completion. It can occur at the same time, but it's it's own thing.

When the participant is not in any program of study, whether it's TAACCCT-funded or not. So if they complete a non-TAACCCT funded – excuse me, if they complete a TAACCCT-funded program and then they enroll in something that's non-TAACCCT funded, they still haven't exited your institution, so this is not yet an exit.

And so the reasons that are listed in the definition include: formal withdrawal, expulsion, graduation, and other reasons. And I want to spend a little bit of time on other reasons. I think it's very important – and we have – I say "we;" I've just been on so many of these.

I haven't really done this formally, I don't think, in any of the webinars or convenings before about how "other reasons" makes a difference when you're thinking about counting participants, particularly in the follow-up outcomes, because there are generally going to be some other reasons why you have to exit people. And that can make a difference on starting your exit clock for follow-up outcomes.

But there are a couple of things that I want to say about that. And first is that DOL doesn't define what those other reasons might be, all the reasons that a participant may leave or an institution has decided to exit a participant. Those are institution-specific and so we don't need to look at them; we don't approve them. That's something that you need to decide for yourself.

One of the things, though, that you will likely need to decide is when are you going to exit someone who stops – who doesn't enroll anymore if they just ghost or disappear? So that's probably an "other reasons" purpose of exiting student that you're going to have to think through. And you may have thought it through already. You may have come up against this already.

And there's some things to think about, but what you should do in this situation is develop a formal written policy. Keep it on file. Because the reason is, you want to be able to apply it to all your TAACCCT participants equally, and I'll explain why in just a second.

If you already have an institutional policy for this – for example, if you consider someone who doesn't re-enroll after a semester to be – to no longer be a student at the university, then that could be the same policy for your TAACCCT purposes. Or you may develop a separate TAACCCT policy for purposes that have to do with reporting itself, or for purposes that have to do with the specific programs that you've developed that you think requires certain circumstances.

Now, here's the implications of this and here's the reason why it's important. Your exit policy – exit itself – your exit policy here, it starts the clock for counting the follow-up outcomes that may apply.

So what that means is, if you have someone – let's say you have a participant named Sam who just completed his semester in May. And you have a policy that if someone doesn't come back for six months, they're no longer a participant in TAACCCT. We won't say your institution; they're no longer a TAACCCT participant. So at this point, Sam doesn't come back by December. Six months have passed. So Sam's exit date would be May. Whatever the last day of class was in May, that's his exit date.

It took you six months to know that because you had to track – six months had to go by. But if that was your exit policy, six months of not re-enrolling was your exit policy, then you would know that retrospectively that date in May would have been Sam's exit date.

And at that point, that would start the exit clock for him, for you to start being able to know, well, OK – before he left, though, Sam, for example, did get a credential. So let's see if Sam got a job during that time period.

So you need to set this exit policy; because if you don't, you're going to be not getting some of these people who may have completed a credential, but they're just kind of hanging out there somewhere. They left and you don't know if they're coming back. Which, if they did get a job, you can go back and collect that data on them.

Now, the other side of that is, but what happens if Sam comes back in January? If you've already exited him – keeping along the same example, if you've already exited him through your six-month policy, if Sam comes back in January, you can't count him again as a new participant. And if he completes a couple more classes, you can't count his credits again because he's already an exiter. But he's in that follow-up status.

So if he did complete a credential before he left, you can still track him as a completer and an exiter. You can still track what he's doing as a follow-up status.

So developing your own policy for – under this rubric of "other reasons" for what happens to students who they don't come back every semester, they show up every once in a while or some just never come back, that's really important to do. Because if you just wait and wait and wait and wait to see if they're going to come back, they may not come back.

And so you may want, at some point, to start collecting the follow-up outcomes because you have some completers and you want to be able to track, well, what happened to them after that? And you will want it for your own institution's purposes and your program's purposes, maybe looking to watch your students' data to see, well, how many students do leave? And how long do they leave? And how many come back? And develop some sort of policy that makes sense for your institution.

OK. And I would like to move now to sort of second portion of this, which is more just roleplaying some scenarios. You're going to see as we talk through this that – and I put up these slides with some timelines – that completion and exit has effects on a lot of different things and we're not going to talk about all of them today.

The things we're mainly not going to talk about are things that happen while people are still in school but haven't exited yet. Just we're trying to keep this to a manageable topic today. We're mostly talking about the effect today of completion and exit on follow-up. So in a future webinar we'll talk more about how – what happens in school, what to do with all those in-school status outcomes, the nuances of those, including how completion and exit affect those.

But today we'll just focus on completion, exit, and follow-up. And Scott is going to help me demonstrate how to apply this information.

OK. Scott, how are you doing today?

MR. ESTRADA: I'm doing well, Kristen. How are you doing?

MS. MILSTEAD: Good. So I hear you have some questions for me?

MR. ESTRADA: Yeah. You know, I've got this really cool program at my college and it's a one-year certificate program. But there's just these little nuances that I don't quite understand, so I'm hoping to get your help.

MS. MILSTEAD: Okay.

MR. ESTRADA: The first thing really is I have this one student who – she's taken a couple classes, but she is not going to end up – she isn't going to end up completing the certificate. So she ended up not completing and I just don't know what to do, how to count her. Like, what else do I count her, other than B.1?

MS. MILSTEAD: OK. So it sounds like if she didn't complete at all – complete any type of program – then the only thing you're really going to be able to count her in is B.5 credit fields. With the exception of, again, here's the B.10. If she was an incumbent worker, once her enrollment started you'll always track her through the end of the grant as an incumbent worker, to see if she got a wage increase.

But other than that, you just want to report any of those credits she received for those courses, but that's about it.

But I do have one question. Did these courses that she completed, were they in the same year or across multiple years?

MR. ESTRADA: No. She took two courses in the spring quarter, so it was all in one year.

MS. MILSTEAD: OK. So then those would be the only two things. If they had occurred across different report years, in the first year you would have also been able to put her in B.3 because she was still there. She could have potentially been a completer the next year, but she wasn't.

So in the first year she would be in B.3. Then in the second year, you would just put her in – her credit hours. But be careful because you wouldn't put her in as a participant again in that second year; she was already counted the first year.

MR. ESTRADA: Got it. OK.

MS. MILSTEAD: OK.

MR. ESTRADA: Well, and then – so that's Jessica. But a lot of our students, they are taking this one-year certificate program and they're really only enrolled in our college for that program. So the result of that is, they're not enrolled in other courses. So basically, they take a year to get their certificate; and then once they complete, they exit at the same time. So I count them as completers and then when do I start tracking their follow-up outcomes?

MS. MILSTEAD: OK. So in this case, yes, they're completing and exiting at the same time. So completion here, you don't – just consider them the same. You don't need to worry about there being a – (inaudible) – timeline.

Exit is always the thing that starts the clock for follow-up. So there's nothing really strange or unusual or anything to keep in mind here about how to count the follow-up outcomes. Just the only thing to be aware of is that there are two tracks for follow-up. There is B.7 track, which is someone goes on to further education; and then there is the B.8 track, which is if someone is placed into employment and then the further tracking is to see if they retain it.

And so you would want to track to see which one of those occurs first in time, if either does. But there is that short window for the entering employment outcome to occur. That can only occur within the first quarter after the exit. If that happens, then you would place them there. If that doesn't happen, you can continue to track to see if the participants go on to further education and placement there.

But they would either go in one or the other, and whichever occurs first in time is the one that you would put them in.

MR. ESTRADA: OK. So that makes sense. I think where I also get confused, though, is a lot of – this, as I said, is a one-year program. So our first cohort in our first year started in fall quarter. So grantees would work through the fall, winter, and spring quarter, usually finish it by the end of spring quarter. So that's, like, end of May – May 30th. So I don't really know how I'm supposed to carry – how I'm supposed to track those students from – that's two different reporting years, isn't it?

MS. MILSTEAD: Yes. So in that case, what you would do is the first year, again, they are retained in B.3. And then they're second year, they're not completers until then. Again, you would count them again as participants in that second year. But then in that quarter after completion and exit, which you said they graduated May 30th, right?

MR. ESTRADA: Yep.

MS. MILSTEAD: OK. So that quarter actually would end June 30th for their completion and exit. So then the clock starts ticking for them to be placed into employment starting on July 1st. And if they get – are placed into – well, it doesn't start. They can get the employment any time after completion, but as long as they have a job at some point prior to September 30th – on or prior to September 30th – they can be counted in B.8.

So it's any point up to the last day of that quarter after exit. And you would count it – if they do, you count it – the employment in that year in which they actually get it as well.

MR. ESTRADA: OK. So I have to wait until the next quarter to count them in B.8 or B.7.

MS. MILSTEAD: Well, they can get the employment –

MR. ESTRADA: Right.

MS. MILSTEAD: – prior, yes.

MR. ESTRADA: OK.

MS. MILSTEAD: Yeah.

MR. ESTRADA: So I also – so as I was saying, a lot of these students, they complete this one-year certificate and they're there at my school just to – just for the certificate. But I'd say that's maybe half the students. The other half of the students, they're there for other reasons as well; they're enrolled in other classes. So even if they finish in, let's say, May 30th, in the spring quarter, they'll stay at my college and they'll enroll in other classes. So they're not completing – are they still considered exiters? How am I supposed to track their follow-up outcomes if they're still enrolled at the school?

MS. MILSTEAD: OK. So in this case they're kind of – think about it in a good way here. They're in limbo, sort of. Like a reporting limbo, in terms of their follow-up outcomes. Which is not a bad thing because you're still tracking and collecting all their in-school outcomes. This is the term that I generally give to them and put on a lot of the FAQ guidance and the technical assistance resource guidance.

They're in-school outcomes, again, are the things like their credits and their credentials. As long as they're still there racking those things up – you're counting them as long as they're still there. They're still TAACCCT participants; they just haven't gotten to follow-up status yet. They don't get to follow-up status until they actually exit.

So it's like everyone, even your previous students who exited and completed at the same time, they get – their in-school outcomes are counted as well. But these students are staying a little longer, so you want to keep collecting all of their in-school outcomes too, while they're still there. And then at the point when they do finally exit, that's when the clock kicks in for them.

MR. ESTRADA: OK. So then once they exit, they – I mean, what do I do? Is there any difference between them – those – (inaudible) – and how I track them versus those that complete and exit at the same time?

MS. MILSTEAD: Yes. Here's where there's a little twist to this. There's a longer window for them for entering employment, because the definition for being counted in B.8 is having entered employment, so that they have to have completed a TAACCCT program and exited. If it didn't occur at the same time, then they could have gotten a job while they were still in school and racking up all of those other in-school outcomes. But then you wouldn't go on to track and then count that until after they exit and then they're in follow-up status.

So there could be a really long timeline for them to be able to get this job and then for you to be counting it in B.8. And it could be the same job that they got when they first were completers, or it could be they left and went actually and got a different job. But as long as they still have a job in that first quarter after they exit, they can be counted in B.8; they just have a longer time to do it.

MR. ESTRADA: Interesting. So if I have a student who is still enrolled at the school and they get a job, and then they leave, as long as they're still employed I can still count them in B.8?

MS. MILSTEAD: Yes. As long as they still have that job within that first quarter after the quarter of exit, that's correct.

MR. ESTRADA: OK. Interesting. So what if the students are – they're not enrolled in – they completed in the one-year certificate and they don't have a job, but they're still enrolled at my college in a whole other program. Then that means I should just count them in B.7, right?

MS. MILSTEAD: OK. So B.7 is actually for reporting – that's a good question. B.7 is actually for reporting what happens after exiting the institution. So it's a follow-up outcome. So if they're still at your institution, if they've completed a program and now they're enrolled in something else, even if it's not TAACCCT-funded, they're still at your institution and you're still collecting anything they might take that's grant-funded.

Let's say they may come in and take another course that's grant-funded. So you collect those credit hours as well and you're tracking to see when they do exit. And then once they do, then those two tracks become active, whether they go on to further education or whether they go into employment, either one of those. So going on to further education is for exiting the institution itself, not exiting a TAACCCT program.

MR. ESTRADA: OK. So I think, now that you've said that about B.7 and B.8 and about exiting in general, I need to – I think I might have misrepresented some of my data on my APR. Is there any way to change that? Or am I in trouble for having –

MS. MILSTEAD: No, of course not. Of course you're not in trouble. We want you to have accurate data and we want to help you and that's what we're here for. So all you need to do is just send an email to your FPO and he will – or she – he or she will help you to get that taken care of.

MR. ESTRADA: Excellent. Thank you very much for your technical assistance.

MS. MILSTEAD: You are very welcome. OK. Thank you, Scott. You can just take a step back for a moment.

OK. Starting at the beginning, I put up timelines at different times that we're discussing at the top – that had titles at the top that were discussing the type of scenarios we were talking about. Exit without completion, simultaneous completion and exit, and what happens when the completion and exit occurs at different times.

So I think the first one is pretty easy to grasp; it's pretty self-explanatory. If there's no completion, there's not going to really be anything to track follow-up-wise.

The second one is fairly easy to grasp, I think, as well. If you have two things that are occurring at the same time, then there's no wondering about when the – what time to start the clock or when certain things are occurring in time. That occurs and from there you're just tracking does the student go on to further education or does the student go on to employment? Which occurs first?

And the third scenario is I think the trickiest for people to understand, and that is what happens when a participant completes a program but then stays in to take other courses or enroll in another program. And it doesn't matter if it's a TAACCCT-funded program or a non-TAACCCT funded program. If they haven't exited the institution yet, they're still in this kind of reporting limbo where you're gathering still information about them for reporting while they're a student that's relevant to the APR, but they're not in the follow-up status yet.

So the main thing you need to be paying attention to while they're still in school, as far as follow-up goes, is have they gotten a job? Because if they've gotten a job, if they still have it when they exit, you can count that in B.8, even though they haven't exited yet. But once they do exit, you can count it there.

If they haven't, then at that point you're waiting to see if by the end of the first quarter they do get a job, or you see whether they go on to further education. And that timeline for going on to further education extends through the end of the grant.

So this is kind of a summary of the main things to keep in mind while you're thinking about completion, exit, and follow-up outcomes. One key thing, B.10 is always something you will track for every participant who's an incumbent worker, once they've enrolled. So that's on here. And also, again, B.5, B.6 items, there are some slight nuances that we'll talk about at a later time, but they're on this chart here for you as well to take a look at and digest. But we didn't go over those during our scenarios and the nuances of those today.

But I hope that through talking through some of the scenarios, it helps you understand a little – what to be thinking about while your students are still there, while they're leaving, what dates are important, how long to track certain things, what's important in time as far as what comes first, things like that.

One last thing to talk about is what happens with the six-month extension of program activities? And we touched on this earlier because the question that we had. And that – the thing here is that completion must occur within the program activity's extension in order to be counted. OK. But exit does not have to occur within the program activity's extension to be counted.

So this completion has to be – you only have to complete one program to then being eligible to be counted in the follow-up outcomes. So if completion of any program occurred during the time when you could spend program funds – so within the first three-and-a-half years – then that participant is then eligible to be counted in follow-up outcomes.

Now, they may end up being – they may end up staying enrolling in other things. They may, again, be in non-TAACCCT funded programs and you may be tracking their exit up through July or August and so they may not exit until you're already in the follow-up period. But exit is not an outcome; all it does is trigger follow-up outcomes. It's not a program-based activity.

So originally, the follow-up tracking year – well, the fourth year was the purpose of the follow-up tracking. So the idea was that you would have those final students who were finishing up doing the programs, exiting, and then you would be tracking that exit and have all the extra time to do that.

And so if there are students who are exiting during that time period and you've collected information and gathered information from them or – (inaudible) – other methods on B.7, B.8, and B.9 – further education, employment, and retention in employment.

So just to sort of summarize that, in terms of the fourth year of the grant, from October to March of the fourth year, completion of all credits required for the first credential must occur up to March 31st. It doesn't mean within that time period because you had this whole three years before as well. So for all credentials that are going to be – have any – ever have any chance at having follow-up be counted for them, the credentials have to have been completed by March 31st.

And then after that, starting on April, participants who completed prior to this date but have not exited will only be in non-TAACCCT funded activities after this date. But you should still pay attention and track their exit date for follow-up tracking. Because whenever their exit date is, that's going to start the clock for them, for you to be able to put in whether or not they have entered employment, because they have that one quarter specific timeline.

And second, participants who complete TAACCCT-funded programs after March 31st will not count as completers. Therefore, you will also not track their follow-up outcomes. So you would not need their exit dates.

So if you have people still enrolled in TAACCCT-funded programs after March 31st, remember from our last webinar we talked about how you will count them in B.3 as still being retained. So if they're retained in a program, they're not counted as completers, so there's no follow-up outcomes for them to – for you to count them in.

So that's sort of what the twist is like for the six-month extension when it comes to completion and exit.

And it looks like we have a few questions rolling in already. That concludes what I have to tell you all today. And if you have further questions for me, I'd love to hear them. And it doesn't have to be about this topic; it can be about anything else. Scott and I are going to look through some of the questions.

And Cheryl had some questions for you and some comments and discussion for you, and she'll be on to speak with you about this. We'll be back on again in just a few minutes.

MS. MARTIN: OK. Great. Thank you, Kristen and Scott. And really appreciate those scenario-based things. Scott, by the way, does know the answers to those questions; he was just acting. (Chuckles.)

So yes, let's bring up the first poll question that we have, which is, "Which performance-related topics would you like to see a short presentation on in a future monthly webinar?" And – OK, actually, let's go to that one. Knowledge check number one, John. Thank you.

I'm going to jump to some questions. We thought it's only fair to ask you guys questions. And I thought we were not going to present the rules, John, while people were answering, because that would make it easier for people to copy other people. OK. OK. I can see them; they can't.

Anyway, we thought it would be only fair to ask you guys some questions while we're answering some here, of your questions. So this first one, as you can tell – and many of you are already responding – is, "When should you count a participant as a completer?"

A, when he or she completes their first course in a program of study; B, when all of the credit hours required for the first credential are completed; or C, when he or she completes their first program of study and exits the institution; or D, when he or she completes all the programs of study at the institution they intended to complete; or E, a participant is a completer for TAACCCT reporting purposes according to a policy set by your own institution.

Well, I am glad to see – I think we can give you one more – three more seconds. One, two, three. OK, John. You can display the answers now.

So I'm glad to see that nobody answered yes for D or E, because those are not the correct answers. The correct answer here is actually B, and that is the one that most people said.

I think maybe people answered A – maybe when you said that, you answered a little bit quickly. So when he or she completes the first course in the program of study – say this is a program of study that has three courses. And so they haven't completed the program of study when they've taken just one course; they have to take all the credit hours or all the courses required for that program of study that gets them that first certificate, which is what B represents here.

But they don't have to have exited to be a completer, so that's the distinction there. So the answer is, when all of the credit hours required for the first credential are completed. Not just the first course and they don't have to have exited.

OK. Let's go to knowledge check number two. (Pause.) OK. "Which of the following is not true about exit?" A, completion and exit can occur either at the same time or at different times. Is that not true? In other words, is that false? B, the reasons a participant is considered an exiter are formal withdrawal, expulsion, graduation, or other reasons; or C, if a participant exits the institution and re-enrolls, he or she can count again as a participant; or D, exit policies should be applied equally to all participants.

So which of the following is false about exit? Is it A, B, C, or D? And my screen just froze. OK. I'm back. So let me give you three more seconds. One, two, three. And then you can display these. Thank you.

And most people got this one correct. The correct answer is C, the false – C is false. So if a participant exits the institution and re-enrolls, he or she can count again as a participant? No, they cannot. So that makes the other things here true. Completion and exit can occur either at the same time or at different times. And the other two everybody else got. So maybe it was just sort of like the wording there, "Which of the following is not true?" But great. Looks like people are catching those.

We're going to skip knowledge check number three for now. We'll save that one for later if we need it. And I'm going to go back to Scott and Kristen and we're going to take your questions that you had.

So let me just clarify here, Scott and Kristen. Should I go through all of them? Or should I only answer – should I only use the ones that have a name in front of them?

MR. ESTRADA: No, go ahead and just read them all out.

MS. MARTIN: OK. All right. So we'll start with the question that came up – it actually came up during the very first question that has question and response – question number one and response number one.

So we're in a situation where a participant ends a TAACCCT grant-funded program in year two and then enrolls in a non-grant funded program in that same year. Do we stop reporting the status after year two? And the answer was yes, except that – with the exception of B.10, of course.

And so the follow-up question was, once that incumbent worker – so that incumbent worker, they've attended a TAACCCT grant-funded program and then they've finished – then they've got into a non-TAACCCT grant funded program, and then they exited. Once that – if they're an incumbent worker, once they get a wage increase can you then basically report that wage increase and essentially quick tracking them after that? And the answer is? (Pause.) Are you guys on mute?

MS. MILSTEAD: OK. Hello?

MS. MARTIN: Hi. Now I hear you.

MS. MILSTEAD: OK. All right. So yes, once the incumbent worker gets a wage increase, they can only be counted the first time they get it. So if you've been tracking them and they've received a wage increase, then go ahead and count them and then you don't need to track them anymore for that purpose. Or if that's the only reason you've been tracking them, you don't have to track them anymore at all.

MS. MARTIN: OK. Great. Thank you. Another question. "I thought all participants are force exited on March 31st, 2018?" Scott, can you address that?

MR. ESTRADA: Yeah, so I can – I think I understand the confusion here. So remember, I think the important part of this is a capacity building grant. So you're still going to have students, presumably, enrolled in your institution from the program that you've created. The difference, though, in the last year is you can't use TAACCCT funds for certain activities after March 30th. So – or March 31st. Really, what you're using a lot of TAACCCT fund for is data folks to track and collect student outcomes.

So a student isn't – there's no forced exit of a student. They're still going to be moving through the program in the last year, in the same way that any other student is moving through the program. The difference is what's considered an allowable outcome that you can track them for.

So really, for the most part – I'm generalizing here – it's a lot of the follow-up outcomes because, hey, if they completed in December, by the end of the first quarter they're eligible for – you can still have a data person track their movement through the college and then exit. And then if they get a job, there's no reason for you not to be able to capture that because they're going to do it naturally. It's just – it's the actual using of funds to do other activity that isn't allowable.

So I hope that clarifies things. The exit – there's really no forced exit, in a sense.

MS. MARTIN: OK. And if on any of these answers you don't feel like you got enough of an answer and you still have more follow-up, please do follow up, as always, with the TAACCCT mailbox.

So let's go to the next question, though, which is on question number three, the one that Kristen was answering at the beginning. "If they have completed a credential before March 31st, then we can count them in B.8 after they exit in May 2018? But if they have not earned a previous credential, then we don't count them?"

MS. MILSTEAD: That's correct. A good way to think about this is imagine if March 31st was the end of your period of performance. That would be the student's status on that last day. Whatever everybody else had before that, those are the people you would continue to track. And then maybe through your closeout you might get some people who got jobs and you would know about it and you'd be able to put them in as – (inaudible). You'd be getting some last-minute data in, collecting that wage data.

But originally this SGA was designed to give you a full year for all that. And then six months was given to allow people to capture that full semester. But if you have people who are caught there who haven't completed, imagine that to be the end of a reporting year. And so those people who are still there who haven't completed, they're retainers. They're still there; it's not – they didn't go off into the ether. They're still retained in a TAACCCT program; that's how you would report them.

But they haven't completed under the auspices of the six months activity program extension in terms of what the funds are supposed to be spent on during that time period. So you would not be able to track their follow-up outcome once they get to that – if they get to that point.

MS. MARTIN: OK. Thank you. We have a few more, so I want to keep us going and see if we can get them answered in our last few minutes here.

MS. MILSTEAD: Cheryl, can I say one thing? I was just going to say, we had a couple of other questions that essentially asked to clarify the same thing. And so I think we don't need to read them through again.

MS. MARTIN: OK.

MS. MILSTEAD: But if somebody has a variation on that, please feel free to ask a follow-up.

MS. MARTIN: OK. Great. All right. So the next question, as I understand it, is a quick recap on B.8. "My understanding is that an exiter cannot be counted here until the quarter after they exit. Can you confirm?"

MR. ESTRADA: Yeah, I can confirm that. That is correct. If you need more – it's actually – that's a pretty simple follow-up. And if you're just looking for confirmation, then I'm happy to say that that is correct. So if you need a little more detail, I'm happy to follow up with that. But yeah, once someone's employed, you can't count them until the quarter after they've exited the institution.

MS. MARTIN: OK. TAACCCT nuances, right? I have come to really appreciate that there are a lot of nuances in TAACCCT and a lot of reason why it takes Kristen and Scott time to answer specific questions sometimes. It's just the way it needs to be.

OK. Another question. "What if we are considered separate from our institution? So they enroll in our program – our grant-funded program – and then they go to attend the campus instead and we are considered a separate now cost-recovery program? Are they then considered exited?"

MR. ESTRADA: Yeah. This is a very good question. I think we got this on the last one too. And I could be wrong. But whoever asked that question, I would strongly encourage you to send that in to the TAACCCT mailbox because it sounds very specific to your – it sounds very unique. So I think it's going to take a little bit of a deeper dive to see what the policy is around that. So I'm sorry I can't address it here, but I think we would both benefit if we can talk about it in more depth.

So thank you. That's a great question. And hopefully – I'm looking forward to discussing it with you in the near future.

MS. MARTIN: OK. And if anybody else looked at that one and said, yeah, that's me too; then please also send your question to the TAACCCT mailbox and we'll deal with that on a – take a deeper dive with you on that.

OK. Anthony, you have patiently waited for the question about you have a chart in front of you that says that still enrolled in non-TAACCCT B.4 is an exit point. And I am looking forward to Scott's answer on this one.

MR. ESTRADA: Yeah. So I think – this is actually – I think, if I understand the question, it's a very good question because I've been confused about this before. It's really a question – it's kind of an issue with the wording or the language.

B.4 is – we call it an exit point, and that's different from exiting the institution. So as you know by the definition of B.4, you don't have to exit the – actually, by definition, you can't have exited the institution because you've enrolled in a non-TAACCCT funded program but also haven't completed.

We call that an exit point because we want to illustrate the fact that you don't need to track them anymore. They have no follow-up outcomes. Since they're not a completer, they don't have a follow-up outcome like B.7 or B.8 because they don't qualify for that. Yeah, that's an exit point.

Exiting the institution is where you trigger the follow-up outcomes. So you're actually leave the college; and once that leaving the college happens, then you're going to start worrying about tracking someone in B.7 or B.8.

So I think that is where the confusion is. I could be wrong. It could be somewhere else. And it might be worth us maybe adjusting the language. But yeah, I understand that confusion because it's got – they both use the word "exit" but it's to say two different things.

And if Kristen has – and feel free to cut in if you have anything else you want to add to that.

MS. MILSTEAD: No, I think – I mean, that's accurate.

MR. ESTRADA: OK.

MS. MILSTEAD: Exit point is – the chart itself is describing how to report – how to – basically how to trace somebody through all of these different outcomes in a flow. So at some point, there's an exit out of the flow. So it's an exit point out of reporting – tracking and reporting. So that's separate from talking about a specific event of exiting an institution.

MS. MARTIN: Yeah. I can see how that would be very confusing. Sorry about that.

Yeah. And of course, you do continue to follow them up for B.10, right? If they were in an incumbent worker.

All right. Let's go to the question that says, "So where do we count people if they complete a TAACCCT-funded program and then go into chemistry at our college?" Which I assume is a non-TAACCCT funded program in this case. "Where do we report them on the APR?"

MR. ESTRADA: Yeah, that's – you actually said what I was going to say, Cheryl. I'm assuming the question is geared towards whether or not chemistry is a TAACCCT-funded program. If they – you can count – if they've completed their certificate, they've earned their first certificate or completed the program, but you have other TAACCCT courses or programs that they can still enroll in, you can count those classes while you're waiting for them to exit.

They're kind of in a holding pattern. And the only place they would be accounted for in the APR is if they're completing TAACCCT-funded courses or earning other TAACCCT-funded certificates. Which is good.

If they're in – but if they enrolled in chemistry and it has absolutely nothing to do with what your TAACCCT program was and it's not – the TAACCCT funds did not affect the chemistry at all that they're enrolled in, then you don't really – you don't record them anywhere. You're keeping track of them because you've got to wait until they exit, but you're not going to be – you don't necessarily have anywhere to record them. Which is fine. That's okay because eventually they will exit and then you'll have to put them in a follow-up outcome.

MS. MARTIN: OK.

MR. ESTRADA: Yeah. And I'm having a lot of fun here, but it is 4:03, unfortunately. So I don't want to take anyone else's time.

MS. MARTIN: Yeah. So I think that what we'll have to do is take the rest of the questions that were here and please send them to the TAACCCT mailbox. Is that what you guys want, Kristen and Scott?

MS. MILSTEAD: Yeah. We will take these questions and if you will send them to us, because we can't – I'm not sure we can tell exactly always who sent them. But either way, we will do both. We will address them if you send them to us; and we will address them on the next webinar, so that way everybody can also hear the answer.

MS. MARTIN: OK. Great. Thank you. And I think you can tell, it just takes us a couple days to get the transcript back –

MS. MILSTEAD: OK. Yeah.

MR. ESTRADA: Yeah.

MS. MARTIN: – (inaudible) – question and so on. So if you want your answer sooner than that, send it to the TAACCCT mailbox and we'll get back to you individually, as well as answer them in the next webinar. Which will be when? Do we have a date on that one, Scott?

MR. ESTRADA: I don't have the date off the top of my head, but it's every last Thursday.

MS. MILSTEAD: June. Because it's right here. (Inaudible, cross talk.) June 29th.

MS. MARTIN: OK. Summer is a-coming. Again, thank you all for joining us here. It's a sign of your dedication to the cause of getting TAACCCT reporting right and we know that is not an easy thing to do. So we really appreciate your coming and showing up and patiently listening and letting us know your questions. And we will take more questions for the June 21 (sic) webinar.

And meanwhile, we're always here. You know where to find us, TAACCCT@dol.gov. Thank you so much, Kristen and Scott. Thank you to all of you for joining us. And I'll turn it back to you, John.

(END)