12: Programs: Adult Education

Chapter Contents

Adult Ed Program Overview

The Adult Education (Adult Ed) program module supports the federal Adult Education and Family Literacy Act (AEFLA), Title II of the Workforce Innovation and Opportunity Act (WIOA), and provides states with funding for a variety of services to help adults age 16 and older to develop basic skills (reading, writing, math, and English language acquisition), transition to postsecondary education and training, and gain employment.

Staff can use the module to assist in application and enrollment, track classes and attendance, manage certificates and high school equivalency vouchers, as well as produce the necessary federal reports required by the Participant Individual Record Layout (PIRL).

The Adult Ed program enables staff to perform the following activities for program participants:

- Create an Adult Ed program application and determine an individual’s eligibility
- Create a Participation record
- Enroll a participant in activities and services

- Create Adult Ed classes
- Manage their class registrations and attendance hours
- Transfer students between classes
- Conduct assessments
- Assist with High School Equivalency (HSE) vouchers and practice tests
- Manage other forms for tracking an individual's credentials and outcomes

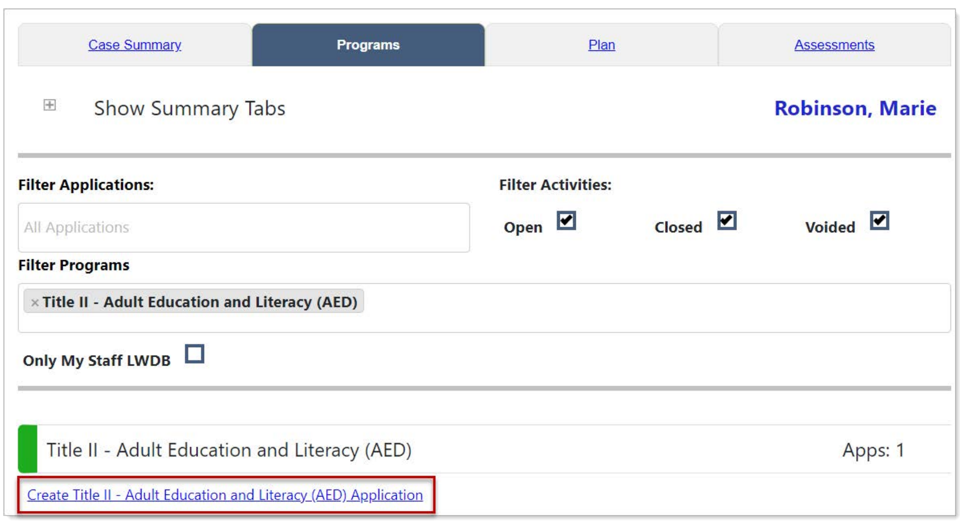
Completing an Adult Ed Application

The Adult Ed application process uses a multi-page wizard to gather all the necessary information to determine an applicant's eligibility. Many of the fields will be prefilled with data gathered during account registration, much of which is used in federal reporting.

▶ To complete an Adult Ed program application:

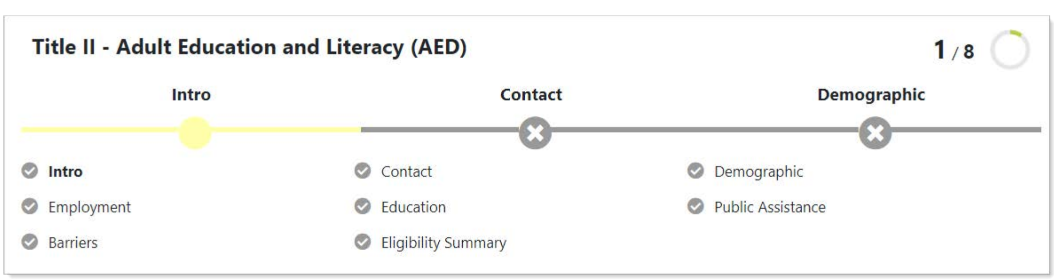
1 Find and assist the desired individual, then navigate to their Programs tab (see figure below).

Note: *See the topic "Assisting an Individual" in Chapter 3 - Manage Individuals for details on how to search for and assist clients, and the topic "Staff Profiles - Case Management Profile" in Chapter 4 - Individuals - Case Management to learn how to navigate to the Programs tab.*



Programs Tab – Create Adult Ed Application Link

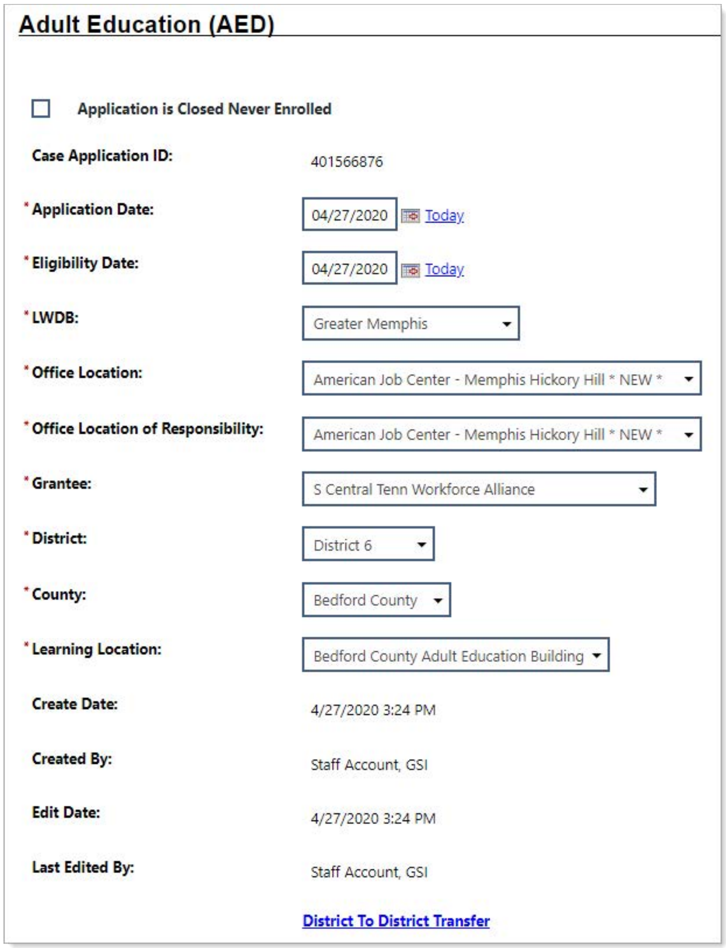
2 In the Title II – Adult Education and Literacy (AED) panel, click the Create Title II - Adult Education and Literacy (AED) Application link (see figure above). The Intro page of the application wizard displays with a progress bar at the top (see figure below).



Adult Education Application Wizard Progress Bar

3 In the Adult Education (AED) section, enter both the **Application Date** and the **Eligibility Date** (see figure below).

Note: *The Application Date cannot be greater than X days ago (the lockdown date), nor can it be greater than today's date. The Eligibility Date cannot precede the Application Date, nor can it be greater than today's date.*



Adult Education Application – Intro Page

4 Confirm or select the correct location information for:

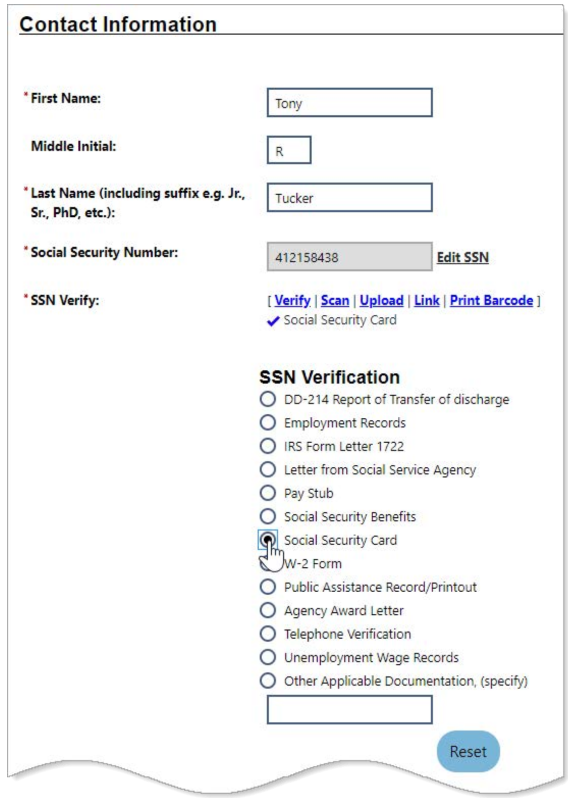
- **LWDB**
- **Office Location**
- **Office Location of Responsibility**

5 Select a **Grantee**, **District**, **County**, and **Learning Location**. Typically, Grantee and District will default from your staff profile.

6 To transfer an in-progress applicant to another district, staff with the proper privileges can click the **District to District Transfer** link, which opens a page where they can submit a request for transfer.

7 Click **Next** to continue to the Contact Information page (see figure below).

Note: *As you click **Next** to move off each page, that page's data is saved, which is a benefit if you can't complete the application wizard in one sitting.*



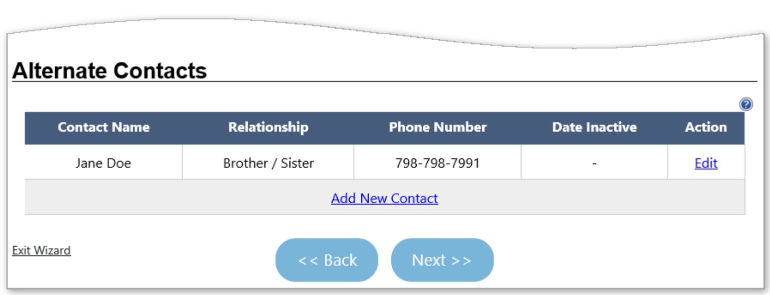
Adult Education Application – Contact Information Page

Contact Information Page

1. Ensure that all required fields have correct data in each section. Changes can be made to any data in non-grayed out fields. Required fields are marked with a red asterisk (*).
2. If not already done, verify the **Social Security Number** by clicking the Verify link under the field to display a list of documents, then click to select one. Click the Verify link again to collapse the list. A checkmark shows it has been verified (see figure above).

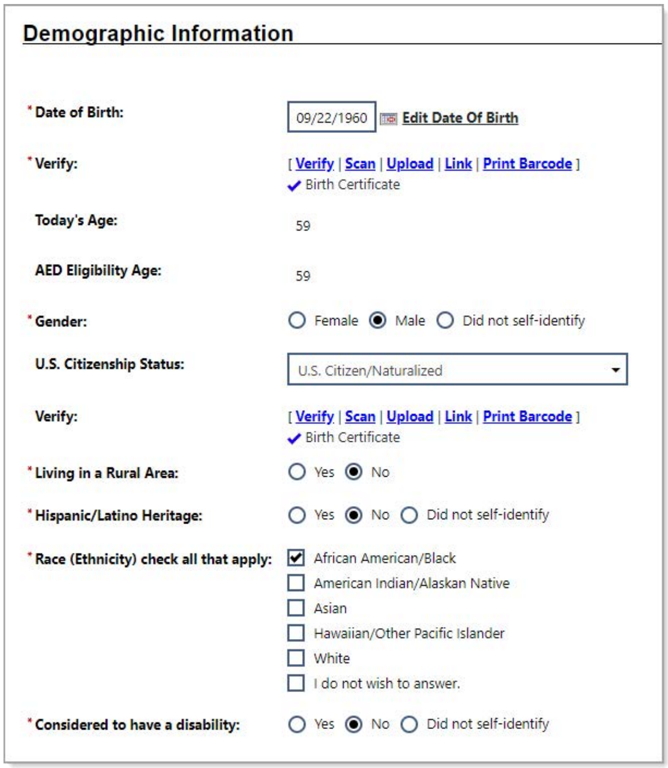
   Note: *Some systems may have the capability of scanning documents used for verification of information. With the Document Management module, staff can upload the documents, or if a scanner is set up, they can scan images of the verification documents and attach them to the application. Uploading a document adds a link below the checkmark that staff can click to view it. For details about acquiring document images, see the topic "In-Context Scanning, Linking, and Viewing" in Chapter 30 - Manage Documents.*

3. To make additions or changes to the individual's contacts, in the Alternate Contacts section, click the Add New Contact link or the Edit link (see figure below) and add or change entries as needed.



Alternate Contacts Section

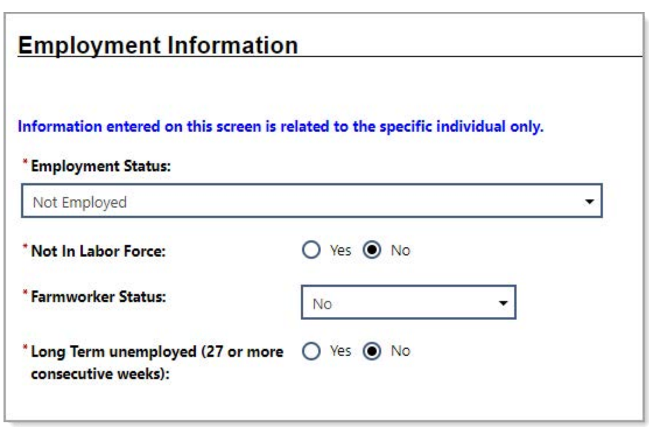
4 Click **Next** to continue to the Demographic Information page (see figure below).



Adult Education Application – Demographic Information Page

Demographic Information Page

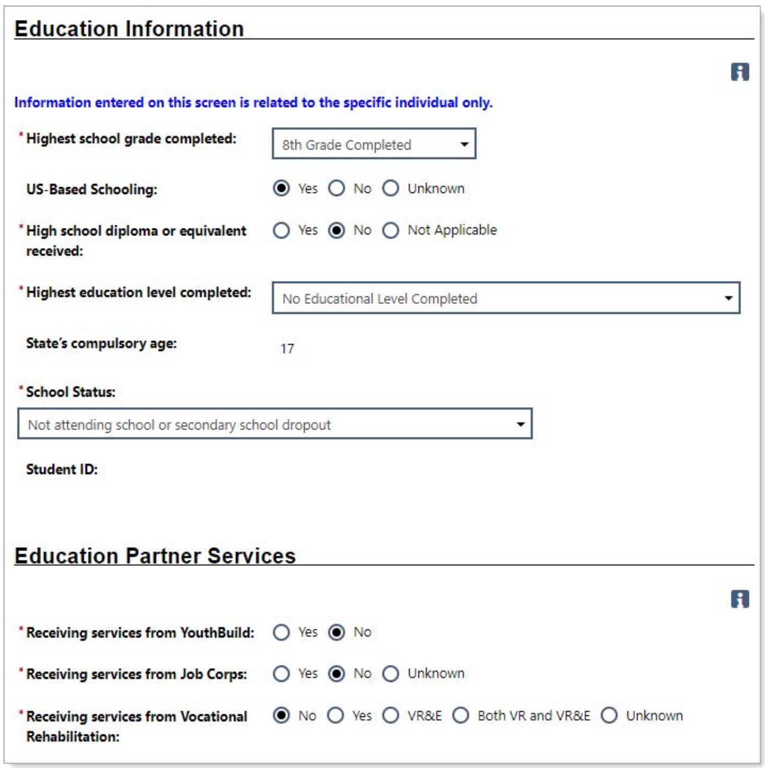
1. Ensure that all required fields have correct data.
2. If not already done, verify the **Date of Birth** and **U.S. Citizenship Status** by clicking the Verify link under each field to display a list of documents, then click to select one. Click the Verify link again to collapse the list. A checkmark shows it has been verified (see figure above).
   a. If Citizenship Status is *Permanent Resident*, two additional fields must be completed.
3. If you select *Yes* for the Disability question, you must specify the disability category using the checkboxes that display.
4. Click **Next** to continue to the Employment Information page (see figure below).



Adult Education Application – Employment Information Page

Employment Information Page

1. Select the applicant's **Employment Status**. If *Not Employed* is selected, specify if they are considered **Not in Labor Force** (by the Bureau of Labor Statistics).
    a. If the client is retired, a student, a stay-at-home parent, or anyone else who is not seeking work, select *Yes*.
    b. If they are not employed, but actively seeking work, select *No*.
2. Select their **Farmworker Status**.
    a. If any status other than *No* is selected, specify their **Farmworker Type**.
3. Specify if they are considered **Long Term unemployed (27 or more consecutive weeks)**.
4. Click **Next** to continue to the Education Information page (see figure below).



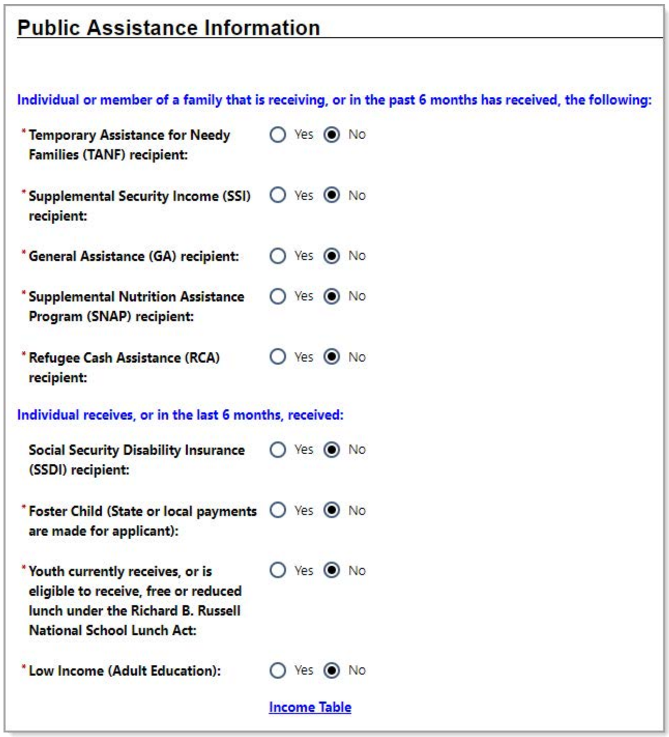
Adult Education Application – Education Information Page

Education Information Page

1. In the Education Information section, select the **Highest school grade completed**.
2. Indicate if this was at a **US-based School**.
3. Indicate if a **High school diploma or equivalent was received**.
4. Select the **Highest education level completed**.
5. If applicable, indicate if this was at a **US-based School**.
6. Indicate the individual's current **School Status**.
7. In the Education Partner Services section, specify if the individual is receiving services from:

- YouthBuild (if so, enter the **Grant Number** in the field that displays)
- Job Corps
- Vocational Rehabilitation

8 Click **Next** to continue to the Public Assistance page (see figure below).


Public Assistance Information

Individual or member of a family that is receiving, or in the past 6 months has received, the following:

*Temporary Assistance for Needy Families (TANF) recipient:	Yes No
*Supplemental Security Income (SSI) recipient:	Yes No
*General Assistance (GA) recipient:	Yes No
*Supplemental Nutrition Assistance Program (SNAP) recipient:	Yes No
*Refugee Cash Assistance (RCA) recipient:	Yes No

Individual receives, or in the last 6 months, received:

Social Security Disability Insurance (SSDI) recipient:	Yes No
*Foster Child (State or local payments are made for applicant):	Yes No
*Youth currently receives, or is eligible to receive, free or reduced lunch under the Richard B. Russell National School Lunch Act:	Yes No
*Low Income (Adult Education):	Yes No
	Income Table

Adult Education Application – Public Assistance Page

Public Assistance Page

1 Specify if the individual *or a member of their family* receives or has received in the last 6 months, any of the following assistance sources:

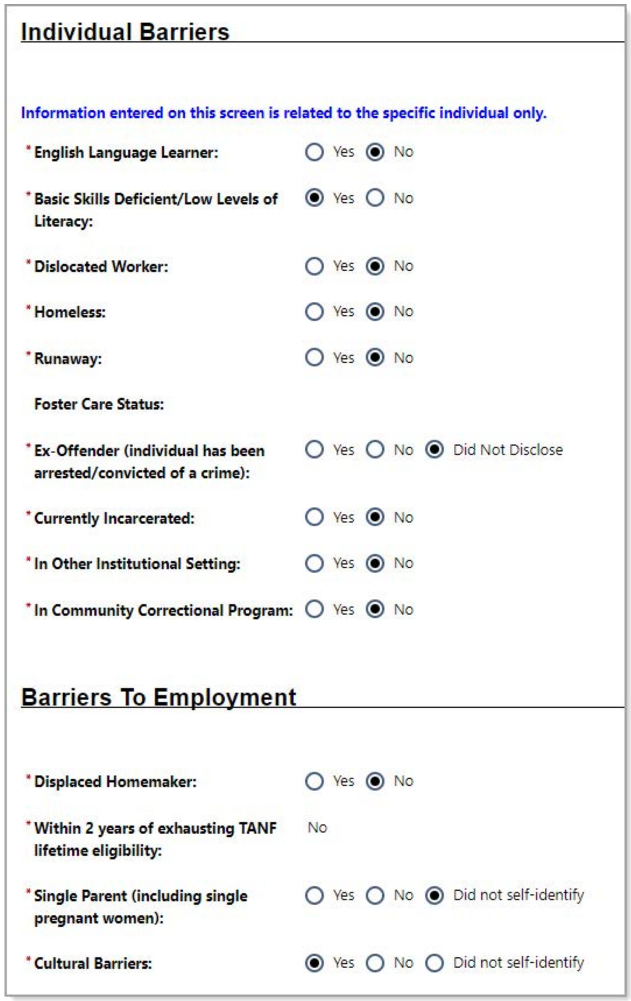
- Temporary Assistance for Needy Families (TANF)
- Supplemental Security Income (SSI)
- General Assistance (GA)
- Supplemental Nutrition Assistance Program (SNAP)
- Refugee Cash Assistance (RCA)

2 Specify if the individual receives or has received in the last 6 months, any of the following assistance sources:

- Social Security Disability Insurance (SSDI)
- Foster Child (State or local payments are made for applicant)
- Youth currently receives, or is eligible to receive, free or reduced lunch under the Richard B. Russell National School Lunch Act

3 Specify if the applicant meets **Low Income (Adult Education)** status. You can click the **Income Table** link to see the guidelines per family size.

4 Click **Next** to continue to the Barriers page (see figure below).



Individual Barriers

Information entered on this screen is related to the specific individual only.

* English Language Learner:	Yes / No (selected)
* Basic Skills Deficient/Low Levels of Literacy:	Yes (selected) / No
* Dislocated Worker:	Yes / No (selected)
* Homeless:	Yes / No (selected)
* Runaway:	Yes / No (selected)
Foster Care Status:	
* Ex-Offender (individual has been arrested/convicted of a crime):	Yes / No / Did Not Disclose (selected)
* Currently Incarcerated:	Yes / No (selected)
* In Other Institutional Setting:	Yes / No (selected)
* In Community Correctional Program:	Yes / No (selected)

Barriers To Employment

* Displaced Homemaker:	Yes / No (selected)
* Within 2 years of exhausting TANF lifetime eligibility:	No
* Single Parent (including single pregnant women):	Yes / No / Did not self-identify (selected)
* Cultural Barriers:	Yes (selected) / No / Did not self-identify

Adult Education Application – Barriers Page

Barriers Page

Note: *Based on the applicant's age and responses supplied on previous pages, the questions that appear on this page may vary from what is presented. Refer to the online help for specific definitions by clicking the information icon in the upper right corner of each section.*

1 Indicate if any of the listed barriers apply. Following are items to note about some of these categories:

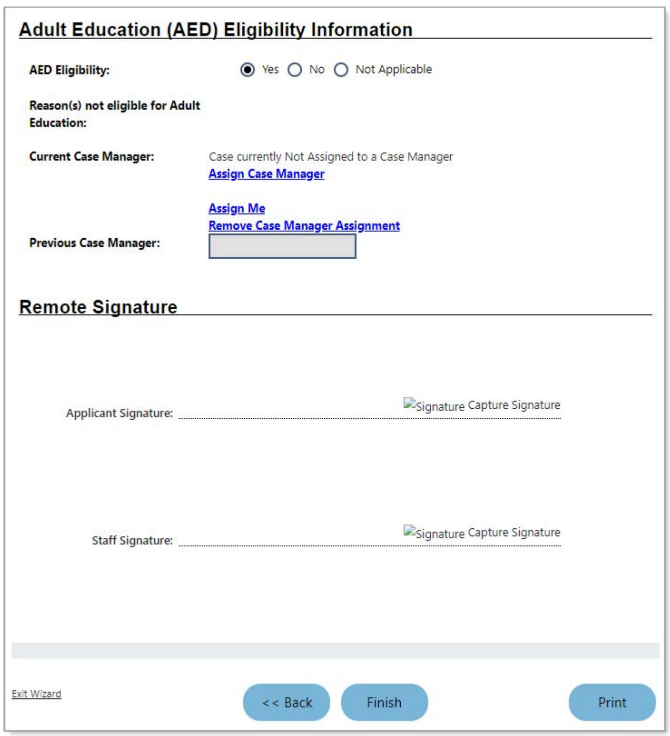
Individual Barriers section

- **English Language Learner** - This is an adult or out of school youth "who has limited ability in speaking, reading, writing, or understanding of the English language, and whose native language is a language other than English; or who lives in a family or community environment where a language other than English is the dominant language."
- **Basic Skills Deficient/Low Levels of Literacy** - An individual meeting the following criteria:
    - Individual's assessment date is no more than six months prior to the youth eligibility date
    - The scores are in Grade level equivalent format, and
    - Any score (reading, math, or language) is below 9.0

Barriers To Employment section

- **Displaced Homemaker** - An individual who has been providing unpaid services to family members in the home and who:
  - has been dependent on the income of another family member but is no longer supported by that income; or
  - is the dependent spouse of a member of the Armed Forces on active duty and whose family income is significantly reduced because of a deployment, a call or order to active duty, a permanent change of station, or the service-connected death or disability of the member; and
  - is unemployed or underemployed and is experiencing difficulty in obtaining or upgrading employment.
- **Cultural Barriers** - If the participant perceives themself as possessing attitudes, beliefs, customs, or practices that influence a way of thinking, acting, or working that may serve as a hindrance to employment.

2 Click **Next** to continue to the Eligibility Summary page (see figure below).



Adult Education Application – Eligibility Summary Page

Eligibility Summary Page

Since Adult Education funds can be used for most activities assisting eligible adults to obtain post-primary education, training, or employment, the AED Eligibility field will normally default to *Yes.* The primary driver of eligibility is age, then low literacy levels or an English language learner. A common reason you may see a *No* is because the applicant is under 16. In most cases, staff will simply review this page, assign a case manager, provide remote signatures, and continue.

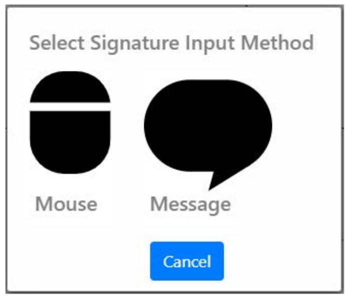
1 Ensure that the **AED Eligibility** field indicates *Yes.*

Note: *If it indicates No, review the Reasons(s) not eligible for Adult Education field. It will normally indicate that the individual is too young for Adult Ed participation.*

2 If case management groups have been set up for Adult Ed in your site, and you wish to assign a case manager, click the **Assign Case Manager** link. Or you can click the **Assign Me** link to assign yourself if you are assigned to a case management group.

3 To capture signatures for the application, there are two options for the Applicant and Staff in the Remote Signature section (see figure above); click **Capture Signature**, then click the preferred method from the pop-up window that displays (see figure below):

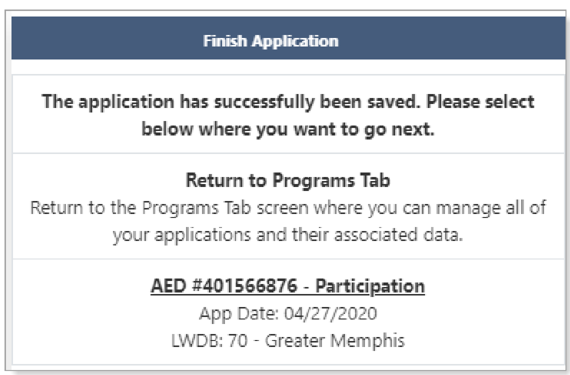
- **On Screen Electronic Signature** – for staff to sign on screen using a mouse, click the **Mouse** icon.
- **Remote Electronic Signature** – to send an internal message with a signable document link to the applicant, click the **Message** icon.



Remote Signature Method Pop-up Window

4 To print a copy of the application, which can be manually signed by both parties, click the **Print** button. You'll have the option to print with or without disability information included.

5 Click **Finish** to complete the application wizard. The Finish Application pop-up confirmation box displays (see figure below).



Finish Application Pop-up Confirmation Box

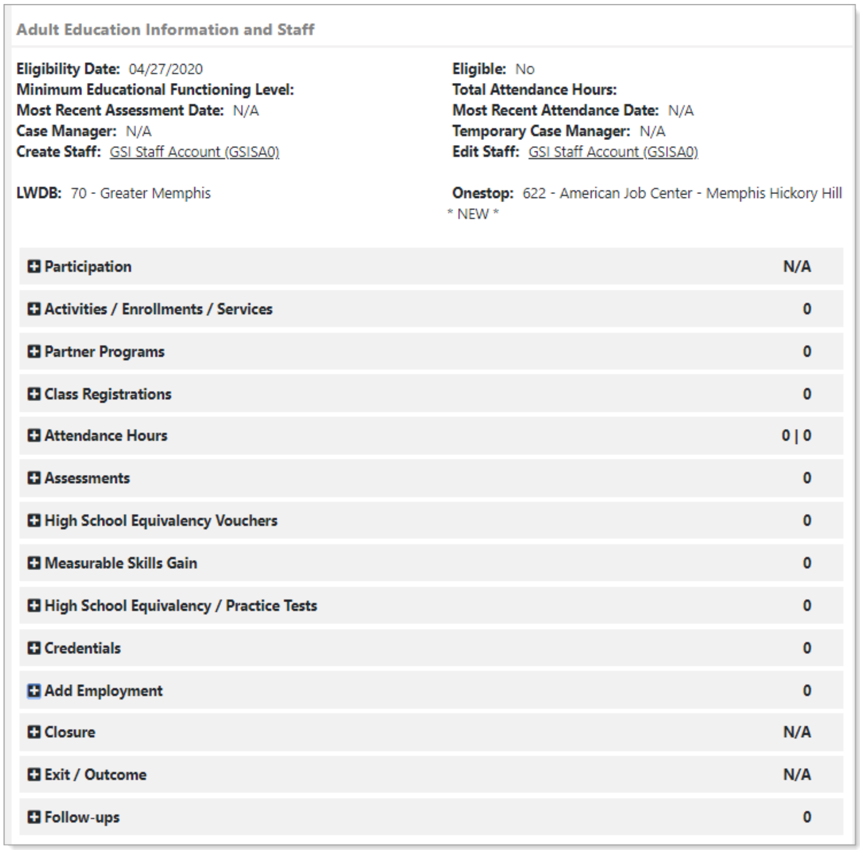
6 To continue with creating the Participation record and then an activity enrollment, click the **AED #xxxxxxx - Participation** link. This saves the application and displays the Participation form. See the topic "Completing the Participation Form" below to continue the workflow.

Note: *You must compete the Participation form and create a first activity enrollment before the individual is considered an Adult Ed participant. If you skip these steps, you will need to return to the Participation form later, before starting an enrollment.*

Completing Adult Ed Forms

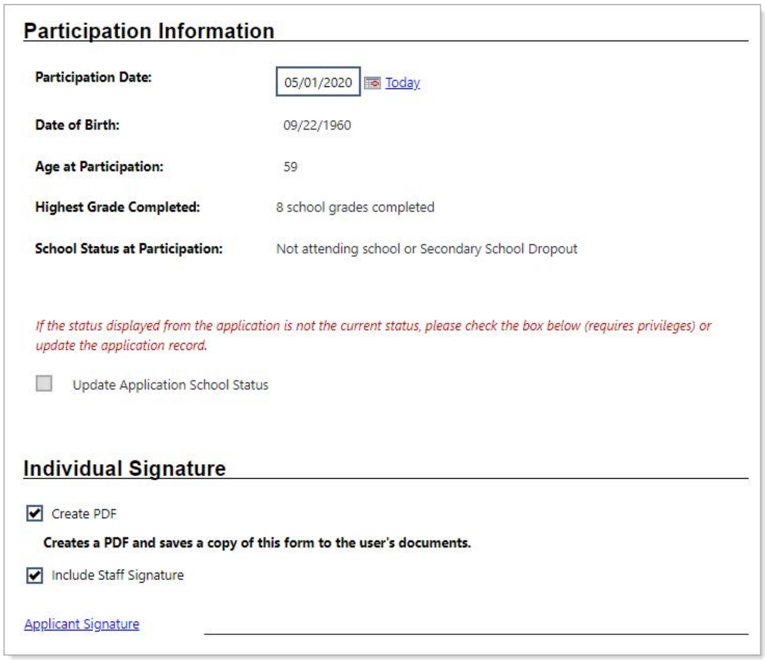
Once the Adult Ed application and Participation form have been completed, all other forms become available on the Programs tab (see figure below). Each area expands, allowing staff to manage the individual's activities, services, class registrations, assessments, outcomes, and many other components of the Adult Ed program.

Note: *Your system's configuration may not include all forms presented in this chapter. The forms are listed in a suggested sequence. Your state's internal policies or business rules may require using the forms in a different sequence than what is presented here.*



Adult Ed Forms on the Programs Tab

Completing the Participation Form



Participation Form

▶ **To complete the Participation form:**

1 From the Finish Application pop-up confirmation, click the **AED #xxxxxxx - Participation** link,

OR…

From the individual's Programs tab:

a. Click the plus sign icon to expand their Adult Ed Application section.

b. Click the plus sign icon to expand the Participation panel.

c. Click the Create Participation link. The Participation Information form displays.

2 Enter the **Participation Date**, normally today's date.

3 To create and sign a printable Participation form, in the Individual Signature section:

a. To create a PDF file of the Participation form, check the **Create PDF** checkbox. This is available for sites with the Document Management module.

b. To include your previously saved staff signature, check the **Include Staff Signature** checkbox.

c. If your site has an electronic signature pad connected, and you want to capture the participant's signature, click the Applicant Signature link to launch the signature pad function, then **Save** it.

d. To print and/or download a PDF copy of the form, click the **Print** button.

4 Click **Next** to continue. The Activity Enrollment wizard opens to the General Information tab. See the topic "Adding a New Activity, Enrollment or Service" below to continue the workflow.

⚠ *If you do not complete a first enrollment (i.e., if you exit the wizard before saving the last page), the Participation record will not be saved.*

Adding a New Activity, Enrollment or Service

Once a Participation record has been created, staff can add an Activity/Enrollment record. The first activity must be a service for the Adult Education program.

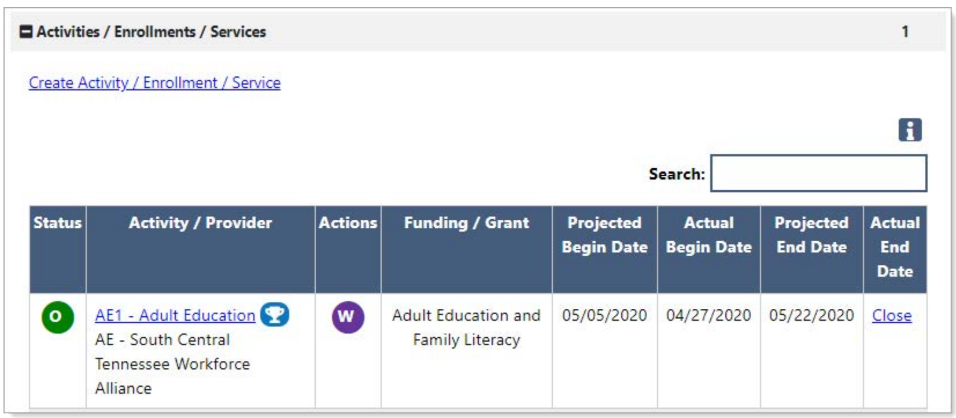
To add a new activity, enrollment or service:

1. Find and assist the desired individual, then navigate to their Programs tab.

   Note: *See the topic "Assisting an Individual" in Chapter 3 - Manage Individuals for details on how to search for and assist clients, and the topic "Staff Profiles - Case Management Profile" in Chapter 4 - Individuals - Case Management to learn how to navigate to the Programs tab.*

2. On the individual's Programs tab, click the plus sign icon to expand their Adult Ed Application section.

3. Click the plus sign icon to expand the Activities/Enrollments/Services panel. Any activities added previously will display in a table from which staff can view and modify the activities (see figure below).

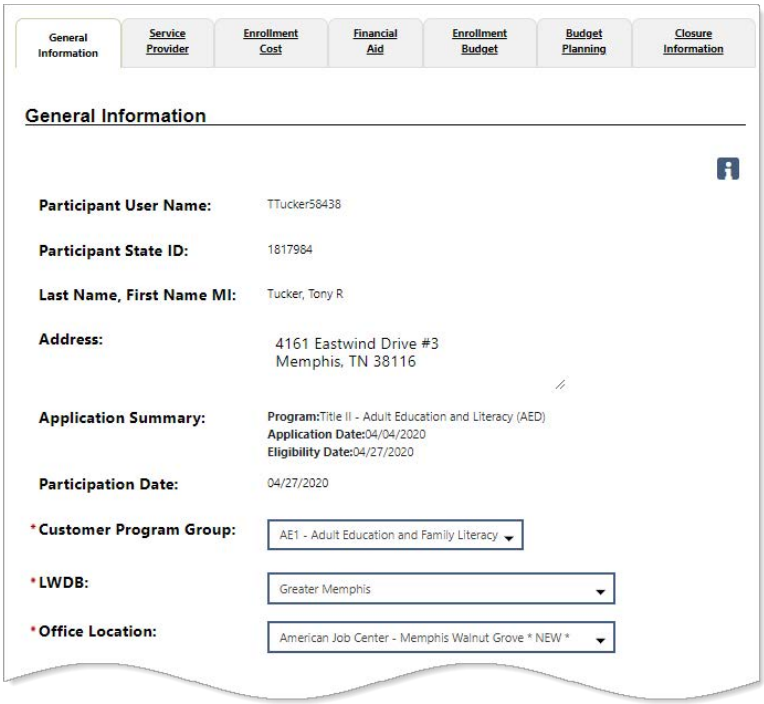


Activities/Enrollments/Services Panel with Existing Activity

4. Click the Create Activity / Enrollment / Service link to create an activity or click the wizard icon to update an existing one (see figure above). The Activity Enrollment form displays on the General Information tab (see figure below).

General Information Tab

The General Information tab records basic information about the individual, staff member, and service the client is seeking.



Activity Enrollment Form - General Information Tab

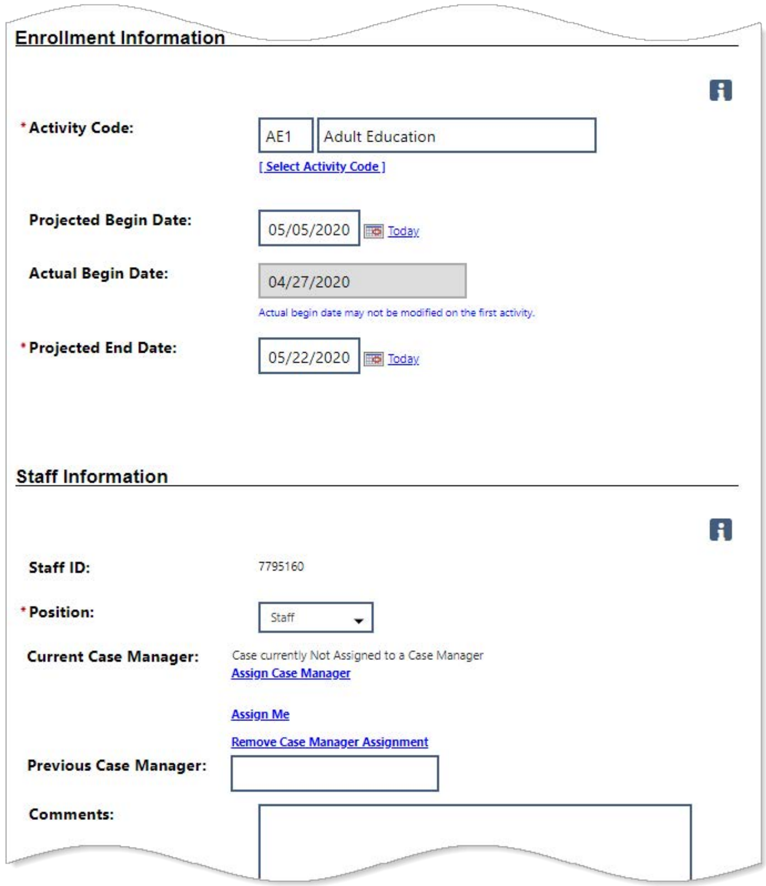
1 In the General Information section, select/confirm the desired **Customer Program Group**.

Note: *The selected Customer Program Group, along with LWDB and Office Location, determine the list of activities displayed in the next section. There is typically only one customer group for Adult Ed.*

2 Select/confirm **LWDB** and **Office Location**.

3 In the Enrollment Information section, click the Select Activity Code link to select from a pop-up list of codes (see figure below). The code and description are auto-filled. If this is the client's first activity, only *AE1 Adult Education* will be available for selection. Keep this activity open so the client can be enrolled in classes.

Note: *If a student needs to put their activities on hold, for example, for summer break from school, use code AE2 Planned Services Hold. Staff must make sure the AE2 projected end date is extended beyond 90 days to ensure the student won't be soft exited for no class attendance hours if over 90 days.*



Activity Enrollment Form – Activity Selection

4 If the activity will start on a future date, enter a **Projected Begin Date**.

5 Enter the **Actual Begin Date** (cannot be greater than today's date). If this is the client's first activity, this date is auto-filled and cannot be edited.

6 Enter a **Projected End Date**.

7 In the Staff Information section, confirm the staff's position. This is a system-set value based on staff's account profile.

8 To manage case assignment, click one of the following links:

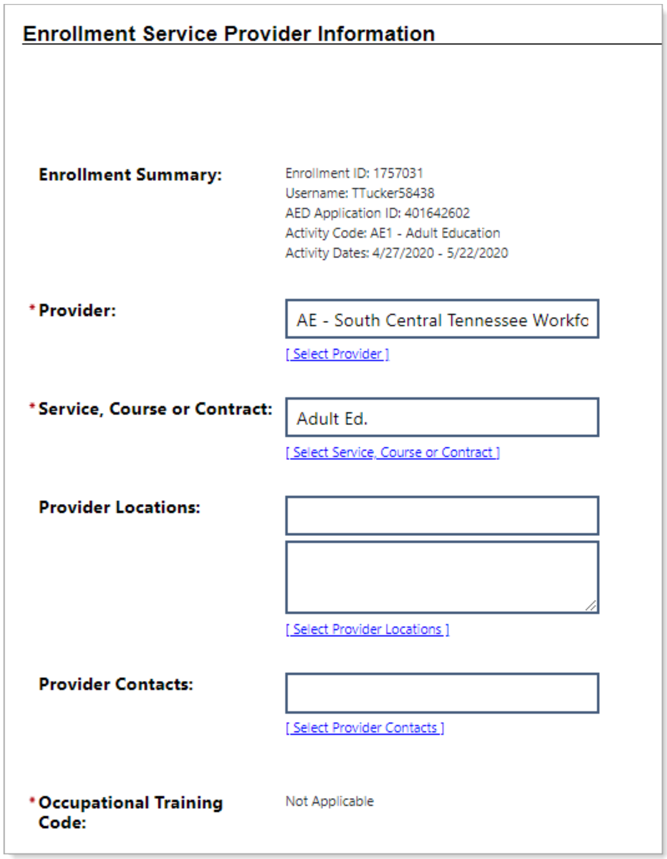
- To assign the client to a fellow case manager, click Assign Case Manager.
- To assign the client to yourself, click Assign Me.
- To unassign the current case manager, click Remove Case Manager Assignment.
- To record who the **Previous Case Manager** was, enter their name in the box provided.
- If desired, add any **Comments** in the space provided.

Note: *Case notes can only be added on this page after saving the information by clicking the Next button and then returning to the page.*

9 Click **Next** to continue to the Service Provider tab (see figure below).

Service Provider Tab

The Service Provider tab records information related to the provider and service or course, provider location and contact, as well as any applicable Occupational Training Code.



Activity Enrollment Form - Service Provider Tab

1. Click the Select Provider link, then click a desired Provider Name link. This will impact the list of services, courses or contracts displayed in the next step. If there is only one provider for the service selected, the provider fields may be pre-filled.
2. Click the Select Service, Course or Contract link, then click the desired Service, Course or Contract Name link.
3. Click **Next** to advance to the Closure Information tab. (The four financial/budgetary tabs are skipped for Adult Ed.)
4. Click **Finish** without entering anything on the page. The Programs tab redisplays.
5. To add more services, repeat these steps.

Closing an Activity, Enrollment or Service

The Closure Information tab of the Activity Enrollment form defines the outcome at the conclusion of the service and is completed only when staff are making a final closure of the service/course enrollment.

▶ **To close an activity enrollment:**

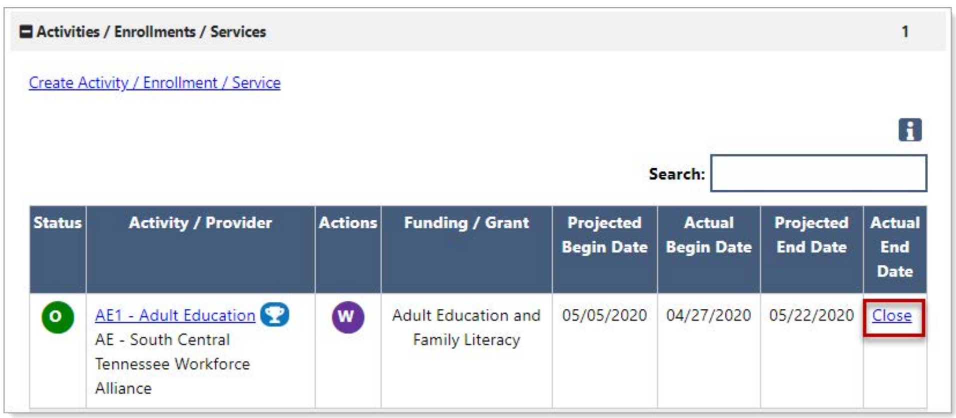
1 Find and assist the desired individual, then navigate to their Programs tab.

Note: *See the topic “Assisting an Individual” in Chapter 3 - Manage Individuals for details on how to search for and assist clients, and the topic “Staff Profiles - Case Management Profile” in Chapter 4 - Individuals - Case Management to learn how to navigate to the Programs tab.*

2 On the individual’s Programs tab, click the plus sign icon ➕ to expand their Adult Education Application section.

3 Click the plus sign icon ➕ to expand the Activities / Enrollments / Services panel. All added services will display in a table.

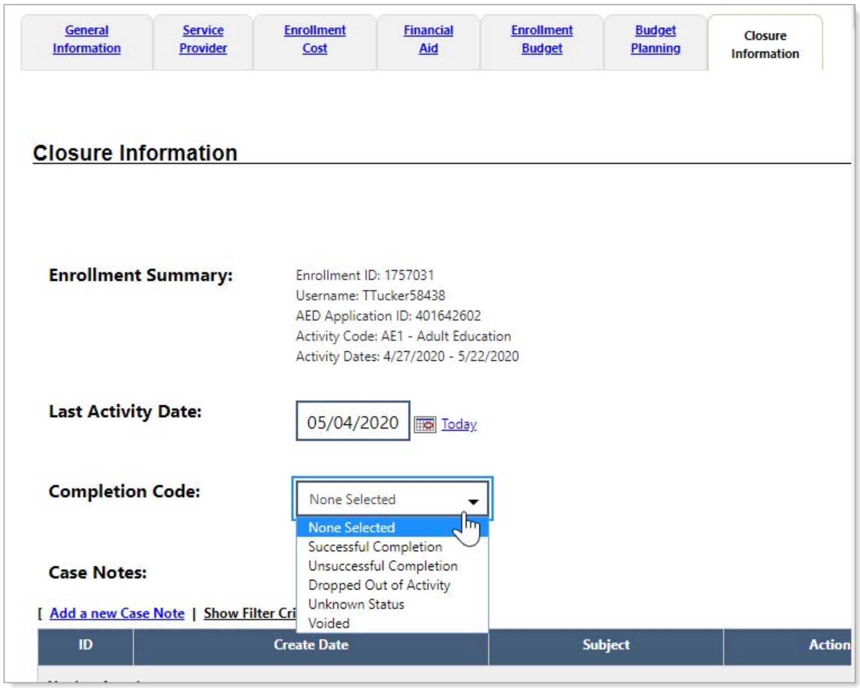
4 Click the Close link for the desired activity (as shown in the figure below).



Status	Activity / Provider	Actions	Funding / Grant	Projected Begin Date	Actual Begin Date	Projected End Date	Actual End Date
O	AE1 - Adult Education AE - South Central Tennessee Workforce Alliance	W	Adult Education and Family Literacy	05/05/2020	04/27/2020	05/22/2020	Close

Activities/Enrollments/Services Summary Table

The Closure Information page displays (see figure below).



Activity Enrollment Form - Closure Information Tab

5 Enter the **Last Activity Date**. This cannot be a future date.

6 Select the appropriate **Completion Code** for the activity.

7 To formally document the client's service enrollment record, click the Add a new Case Note link, complete the applicable fields, and click **Save** to return to the previous page.

8 Click **Finish**. The Programs tab redisplays with the activity closed in the Activities / Enrollments / Services panel of the Adult Ed program.

Recording Partner Program Information

Staff use this form to capture the numerous data entry requirements to meet federal guidelines, including the U.S. Dept. of Education. Most of these data elements differ from similar WIOA data elements. Questions related to Partner Program agencies help determine whether outside agencies can help fund various services provided to the client.

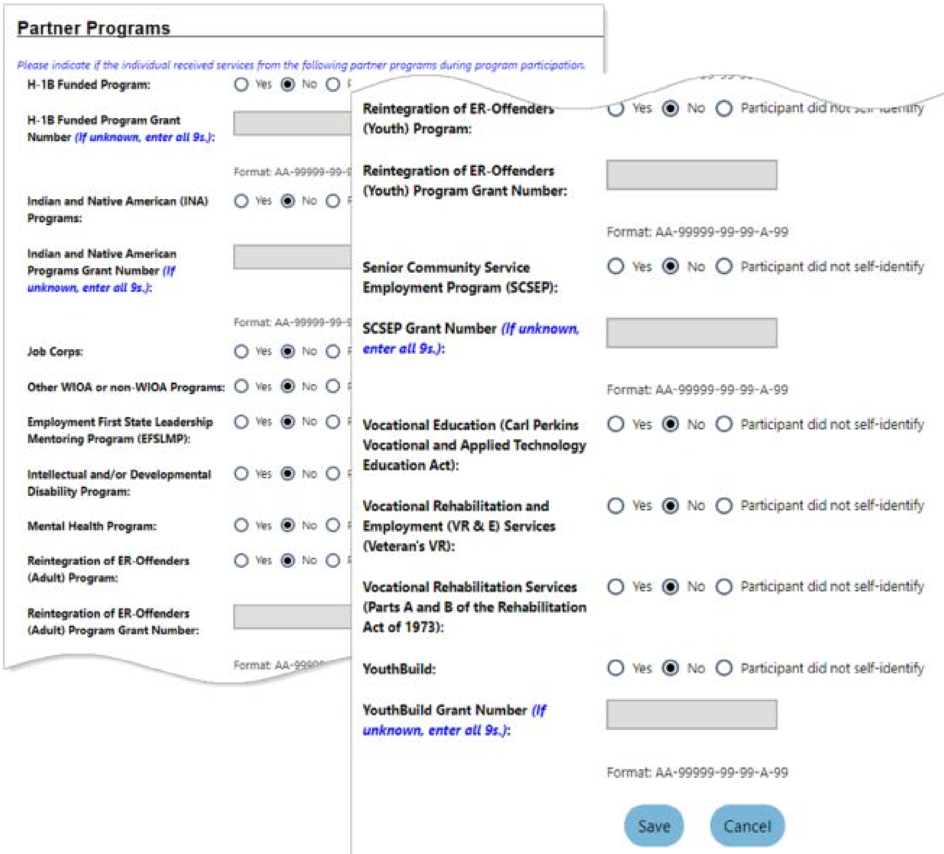
▶ **To record partner program information:**

1 Find and assist the desired individual, then navigate to their Programs tab.

Note: *See the topic "Assisting an Individual" in Chapter 3 - Manage Individuals for details on how to search for and assist clients, and the topic "Staff Profiles - Case Management Profile" in Chapter 4 - Individuals - Case Management to learn how to navigate to the Programs tab.*

2 On the individual's Programs tab, click the plus sign icon to expand their Adult Education Application section.

3 Click the plus sign icon to expand the Partner Programs panel and click the Add/Edit Partner Programs link. The Partner Programs page displays (see figure below).



Partner Programs Page

4. Indicate if the individual received services from the listed partner programs during program participation. Several *Yes* responses require entry of the associated Grant Number.
5. Click **Save** to complete the form. The Programs tab redisplays.

Registering a Participant for a Class

To register a participant for an Adult Ed class, they must have at least one open enrollment for an Adult Ed service.

Note: *Adult Ed staff must create classes first using the Create/Edit Class option on the Manage Adult Education menu in the left navigation pane. See the topic “Creating and Editing Classes” later in the chapter for details. These will populate the list of classes that can be selected for registration.*

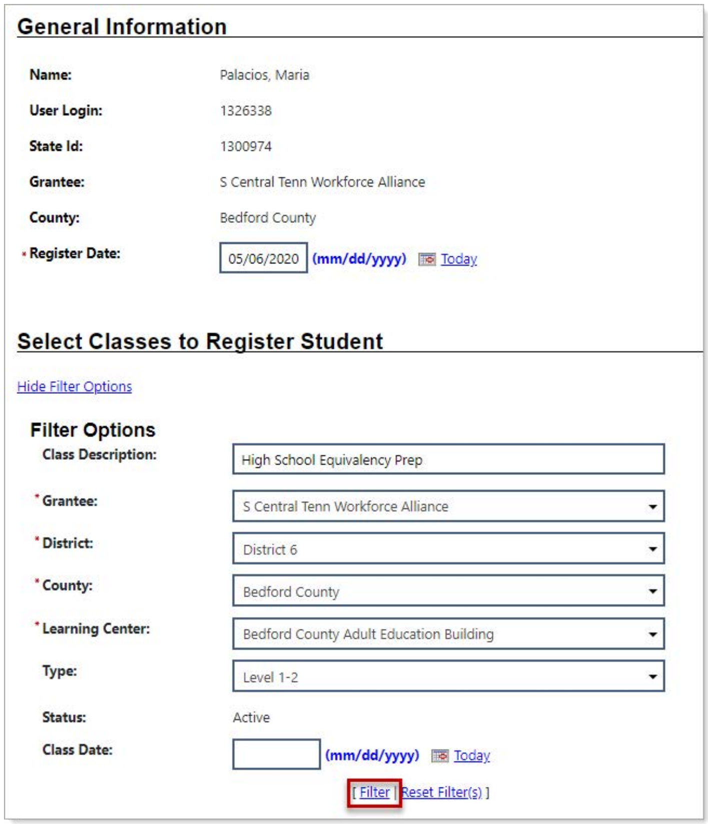
▶ **To register a participant for a class:**

1. Find and assist the desired individual, then navigate to their Programs tab.

   Note: *See the topic “Assisting an Individual” in Chapter 3 - Manage Individuals for details on how to search for and assist clients, and the topic “Staff Profiles - Case Management Profile” in Chapter 4 - Individuals - Case Management to learn how to navigate to the Programs tab.*

2. On the individual’s Programs tab, click the plus sign icon to expand their Adult Education Application section.

3 Click the plus sign icon to expand the Class Registrations section and click the Create Single or Multiple Class Registration(s) link. The Adult Education Registration page displays, where you will use filters to display available classes to enroll in (see figure below).



Class Registrations – Filtering for a List of Classes

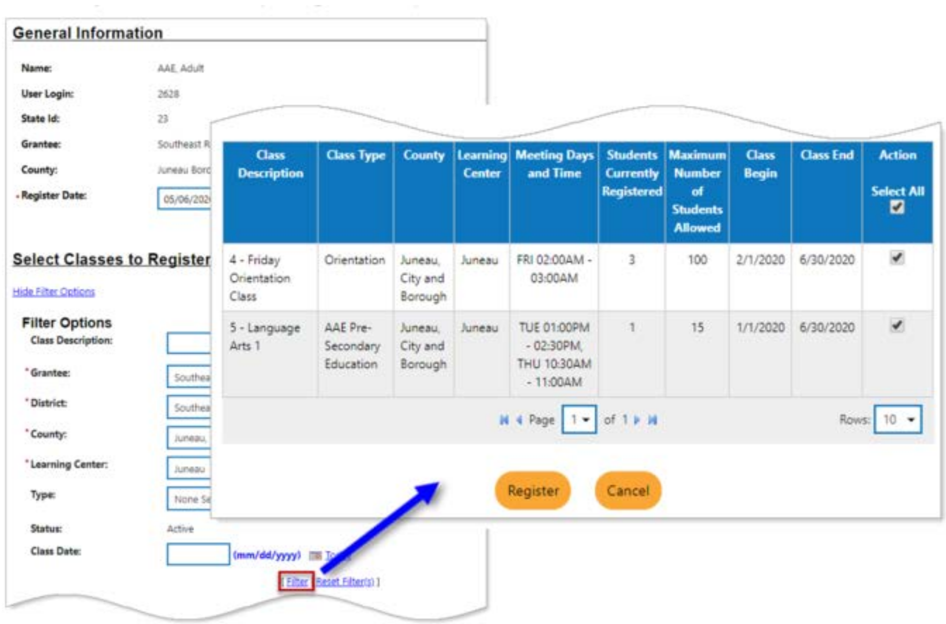
4 In the General Information section, enter the **Register Date** for the day the individual will be registered in a selected class. It is possible to enter a future date for “early registration.”

5 In the Select Classes to Register Student section, select filter options to limit displayed classes to the desired locations and type. Only Grantee, District, County, and Learning Center are required. Typically, Grantee or District is the class provider.

6 Only enter a **Class Description** if you are sure that term is used in the Class Description title; otherwise, it may limit any matching classes.

7 If desired, enter a **Class Date** to limit classes to those whose date range includes this date.

8 Click the Filter link (see figure above). The system searches for matching classes and displays any found in a table (see figure below).



Class Registrations – Selecting Classes to Register For

Note: *You can use the Search field above the search results table to find classes with the same Class Description or Type to narrow the list.*

9 Review the list to identify one or more desired classes, then click the checkbox in the Action column to select each one. You may select and register for multiple classes at a time, and can click the **Select All** checkbox to choose all listed classes.

10 Click the **Register** button. The Programs tab is redisplayed with the selected class showing in the Registered Classes table. No system notifications are sent.

From this table, you can access pages to delete or complete a registration, transfer the student to another class, or enter attendance hours for them. See the topic “

11 Managing a Student’s Class Registration” below.

12 To add another class for as long as the application remains active, repeat these steps.

Managing a Student's Class Registration

Once staff registers an individual in one or more classes, they are listed in the Registered Classes table on the Programs tab (see figure below). This table shows the date they were registered, class begin and end date, brief description, class type, status, location, and instructor.

You can delete or complete a registration, transfer the student to another class, or enter attendance hours for them. Classes, transfers, and attendance can also be managed at a higher level than the individual being assisted. See the topic "Managing Adult Education" at the end of this chapter.

Class Registrations 10

Create Single or Multiple Class Registration(s)

Class Schedule

Search:

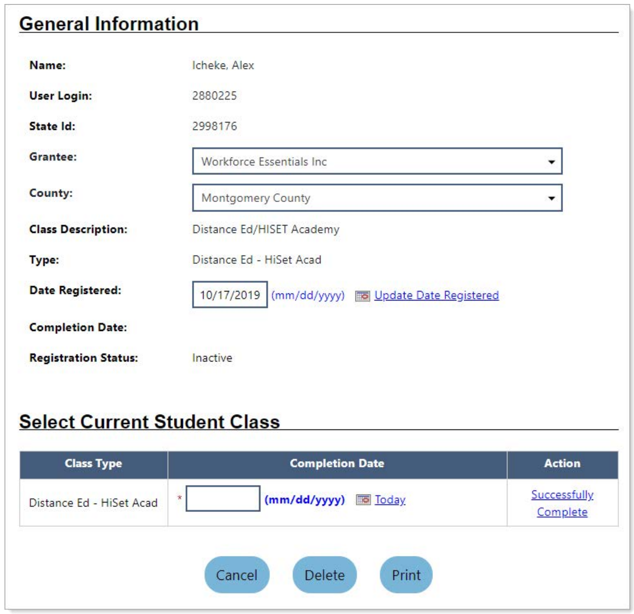
Date Registered	Class Begin Date - Class End Date	Class Description	Class Type	Status	Class Location	Instructor	Action
07/01/2019	07/01/2019 - 06/30/2020	14232 - Multi-Level AE Evening Class	Other	Active	Bedford County Adult Education Building	Atkinson, Danny	Edit Transfer Attendance
07/01/2018	07/01/2018 - 06/30/2019	13329 - PM Evening IELC class	Other	Successful completion	Bedford County Adult Education Building	Kipker, Charalin	Edit Transfer Attendance
07/01/2018	07/01/2018 - 06/30/2019	13327 - Multi Level AE Evening Class	Other	Inactive	Bedford County Adult Education Building	Atkinson, Danny	Edit Transfer Attendance
07/01/2017	07/01/2017 - 06/30/2018	1216 - AE0202017002 - MAN - Managed	Other	Successful completion	Bedford County Adult Education Building	Riddell, Scott	Edit Transfer Attendance
08/01/2016	07/01/2016 - 02/02/2018	1213 - AE0202016006 - MAN - Managed	Other	Successful completion		,	Edit Transfer Attendance

Managing Class Registrations from the Registered Classes Table

Completing, Deleting or Printing a Class Registration

▶ To complete or delete a class registration:

1 In the Registered Classes table, click the <u>Edit</u> link in the Action column for the desired class. The Manage Class Registration page displays (see figure below).



Manage a Class Registration

- To mark the class as complete:
  - Enter a date in the **Completion Date** field in the Select Current Student Class section. The Completion Date cannot be earlier than the Registration Date or later than the Class End Date.
  - Click the <u>Successfully Complete</u> link in the Action column.

    The Registered Classes table redisplays with the updated Status, *Successful completion*.
- To delete the class:
  - Click the **Delete** button in the Select Current Student Class section, then click **OK** to confirm in the pop-up window.

    This removes the registered class, regardless of any recorded attendance. The Registered Classes table redisplays with the class removed.
- To print the class registration:
  - Click the **Print** button in the Select Current Student Class section.

    This displays a printable and downloadable PDF document in a separate window. It includes detailed information on the selected class registration, signature lines for the student and staff, and includes attendance hours, if previously entered. The transcript also includes summary information for any other class registrations for the student.
- To change the registration date for the class:
  - In the General Information section, enter the new date in the **Date Registered** field.

- Click the Update Date Registered link (see figure below).

Changing the Registration Date

The Registered Classes table redisplays with the new date.

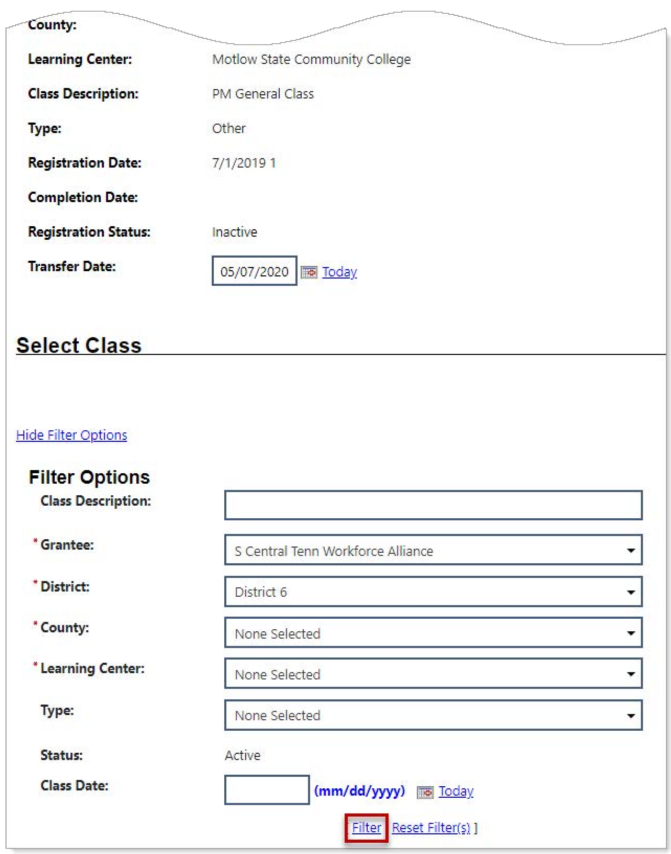
Transferring a Student from One Class to Another

Staff can transfer a student from one class to another class (for example, if a student has had a level gain and is ready to move on to a more challenging class, they can transfer). The registration date that you select for the transfer determines when the existing class is closed and when entry of attendance hours is no longer available for that class.

Note: *To bulk transfer multiple students between classes, use the Manage Class Transfers option on the Manage Adult Education menu in the left navigation pane. See the topic "Transferring Multiple Students from One Class to Another" later in this chapter for details.*

To transfer a student from one class to another:

1. In the Registered Classes table, click the Transfer link in the Action column for the desired Active class. The Transfer Class page displays, where you will use filters to display available classes to transfer to (see figure below).



Class Transfers – Filtering for a List of Classes

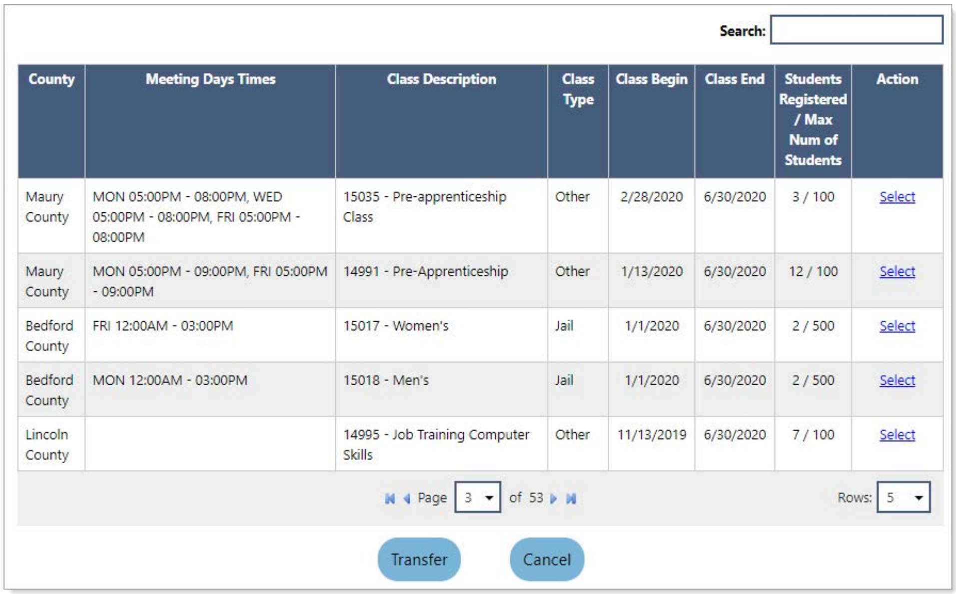
2 In the General Information section, enter a **Transfer Date** for the day to register the student into the class.

3 In the Select Class section, select filter options to limit displayed classes to the desired locations and type. Only Grantee, District, County, and Learning Center are required.

4 Only enter a **Class Description** if you are sure that term is used in the Class Description title; otherwise, it may limit any matching classes.

5 If desired, enter a **Class Date** to limit classes to those whose date range includes this date.

6 Click the Filter link to display a table of all the class search results (as shown below).



Search:

County	Meeting Days Times	Class Description	Class Type	Class Begin	Class End	Students Registered / Max Num of Students	Action
Maury County	MON 05:00PM - 08:00PM, WED 05:00PM - 08:00PM, FRI 05:00PM - 08:00PM	15035 - Pre-apprenticeship Class	Other	2/28/2020	6/30/2020	3 / 100	Select
Maury County	MON 05:00PM - 09:00PM, FRI 05:00PM - 09:00PM	14991 - Pre-Apprenticeship	Other	1/13/2020	6/30/2020	12 / 100	Select
Bedford County	FRI 12:00AM - 03:00PM	15017 - Women's	Jail	1/1/2020	6/30/2020	2 / 500	Select
Bedford County	MON 12:00AM - 03:00PM	15018 - Men's	Jail	1/1/2020	6/30/2020	2 / 500	Select
Lincoln County		14995 - Job Training Computer Skills	Other	11/13/2019	6/30/2020	7 / 100	Select

Page 3 of 53 Rows: 5

Transfer Cancel

Class Transfers – Selecting a Class to Transfer to

Note: *You can use the Search field above the search results table to find classes with the same Class Description or Type as the original class from which you are transferring the student.*

7 Review the displayed list of classes to identify a desired class for transfer, then click the Select link in the Action column to select the desired class. That row will turn bold to indicate your selection.

8 Click the **Transfer** button, then click **OK** on the transfer confirmation pop-up window. The Programs tab is redisplayed with the changes to registered classes showing in the Registered Classes table.

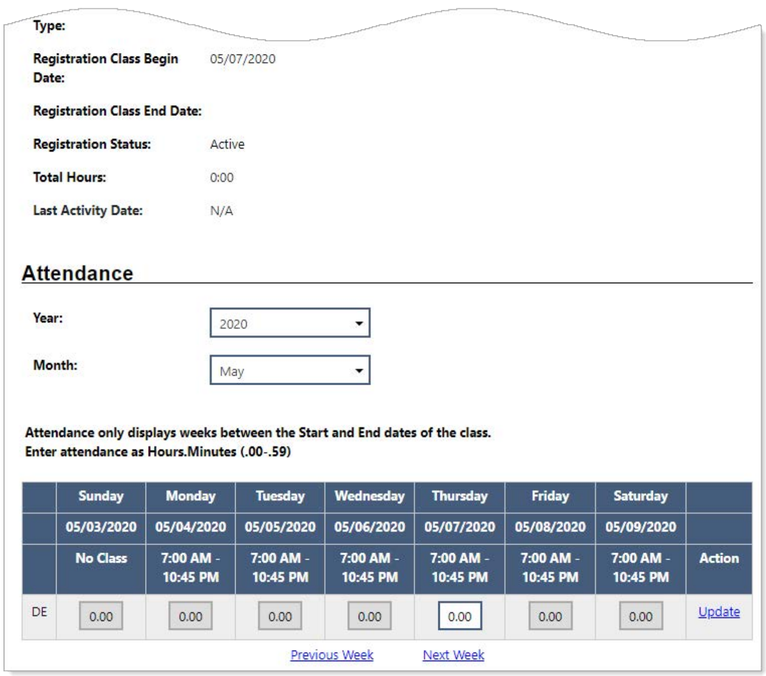
Entering a Student's Attendance Hours for a Class

Staff can enter or change the amount of time a student attended a class per day for classes of any status, including completed. Enterable days are from the class start date to end date. A minimum of 12 contact hours is required in order for them to be reported federally.

Note: *To bulk enter attendance hours for multiple students in a class, use the Manage Class Attendance option on the Manage Adult Education menu in the left navigation pane. See the topic "Managing Class Attendance for Multiple Students" later in the chapter for details.*

▶ To enter attendance hours:

1 In the Registered Classes table, click the Attendance link in the Action column for the desired class. The Attendance page displays (see figure below).



Entering Attendance Hours

2 To change the date grid at the bottom of the page, select from the **Year** or **Month** drop-down lists in the Attendance section.

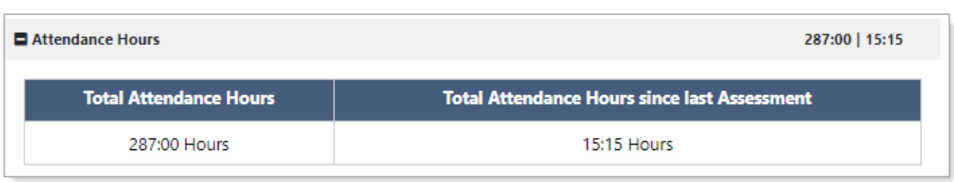
3 Enter attendance as *hours.minutes* (.00-.59) for the applicable days.

Note: *The leftmost column shows the class format code, FF for Face to face or DE for Distance Ed. FF and DE hours must be reported separately, and so for a blended class of both FF and DE hours, there will be two rows in which to enter applicable time.*

4 Click the Update link in the Action column. As you update the times, the Total Hours in the General Information section will adjust automatically.

5 Use the Previous Week and Next Week links to move backward and forward in time.

6 To see cumulative total attendance hours and total hours since last assessment, expand the Attendance Hours panel of the Adult Education program (see figure below).



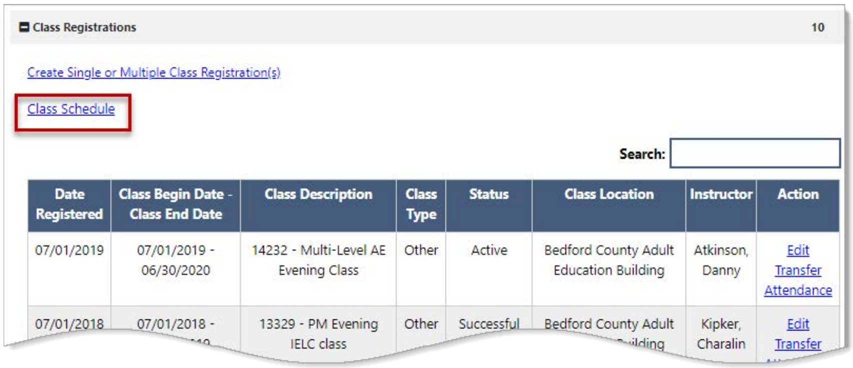
Attendance Hours Panel

Viewing and Printing a Student's Class Schedule

Once a student is registered in one or more classes, staff can view and print their schedule of active classes. This can help the student to stay on track and work other educational or employment-related activities into their daily schedule.

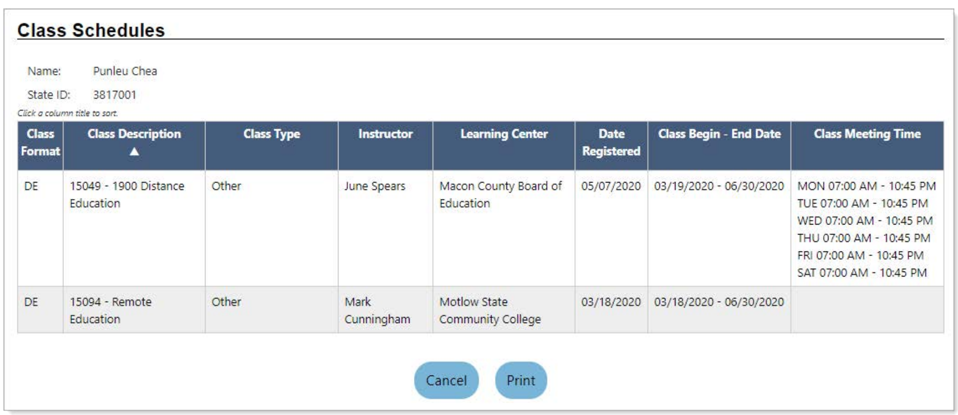
▶ **To view or print a class schedule:**

1 In the Class Registrations panel, click the Class Schedule link (see figure below).



Class Schedule Link

The Class Schedules page displays (see figure below).



Reviewing Class Schedules

2 To print or download a PDF version of the class schedule, click the **Print** button, then use the controls in the pop-up display window to print or save to your local computer.

Creating Assessment Records

The Assessments feature for Adult Ed is an abbreviated version of the Literacy & Numeracy records for WIOA (Workforce Innovation and Opportunity Act). Sites are required to document participant functional areas of deficiency, to provide services to improve areas of deficiency, and to track progress toward improving functional area deficiencies through post testing for all participants who are determined Basic Skills Deficient.

The system allows assessment information to be entered for students in the program by functional area. The system will automatically calculate the Educational Functioning Level (EFL) based on National Reporting System guidelines.

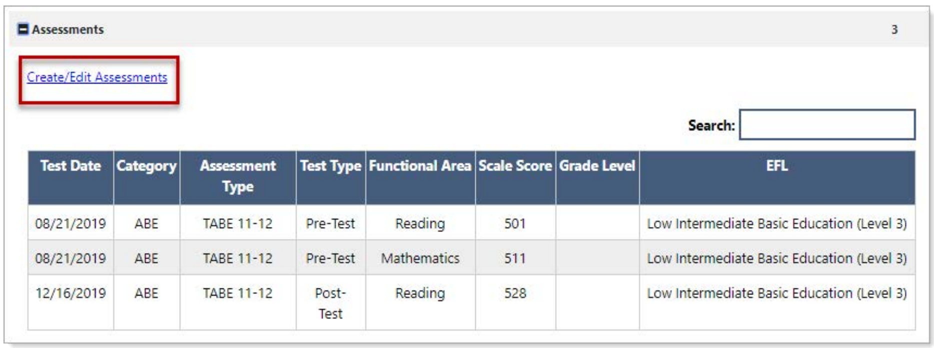
▶ To create or edit an assessment record:

1 Find and assist the desired individual, then navigate to their Programs tab.

Note: *See the topic "Assisting an Individual" in Chapter 3 - Manage Individuals for details on how to search for and assist clients, and the topic "Staff Profiles - Case Management Profile" in Chapter 4 - Individuals - Case Management to learn how to navigate to the Programs tab.*

2 On the individual's Programs tab, click the plus sign icon ⊞ to expand their Adult Education Application section.

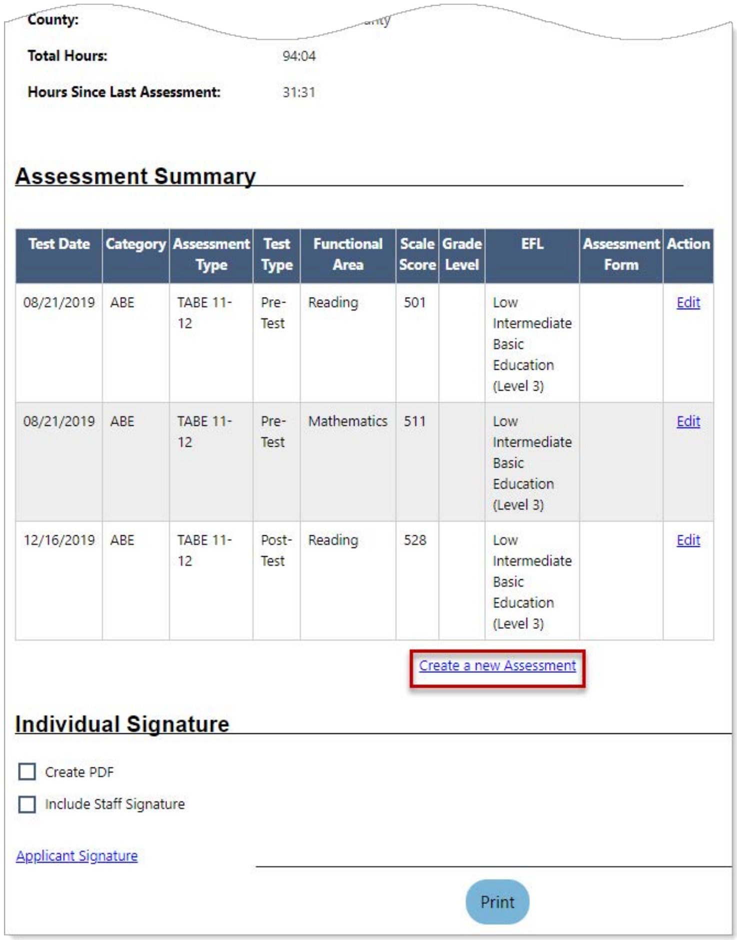
3 Click the plus sign icon ⊞ to expand the Assessments section and click the Create/Edit Assessments link (see figure below).



Test Date	Category	Assessment Type	Test Type	Functional Area	Scale Score	Grade Level	EFL
08/21/2019	ABE	TABE 11-12	Pre-Test	Reading	501		Low Intermediate Basic Education (Level 3)
08/21/2019	ABE	TABE 11-12	Pre-Test	Mathematics	511		Low Intermediate Basic Education (Level 3)
12/16/2019	ABE	TABE 11-12	Post-Test	Reading	528		Low Intermediate Basic Education (Level 3)

Completed Assessments Table

4 The Assessment Summary page displays (see figure below), where you can edit existing assessment records or create a new one.



Assessment Summary Page with Existing Assessments

5 To create a new assessment record:

a. Click the Create a new Assessment link in the Assessment Summary section. Entry fields display below the Assessment Summary table in the Assessment Information section (see figure above).

b. Enter the **Test Date**.

c. Select the assessment **Category**, *ABE* or *ESL*. This selection will determine the options for **Assessment Type**, which you select next.

d. Select the **Test Type**, *Pre-Test* or *Post-Test*.

e. Select a **Functional Area**, which are determined by the assessment Category and Type previously chosen.

f. Enter the **Scale Score**.

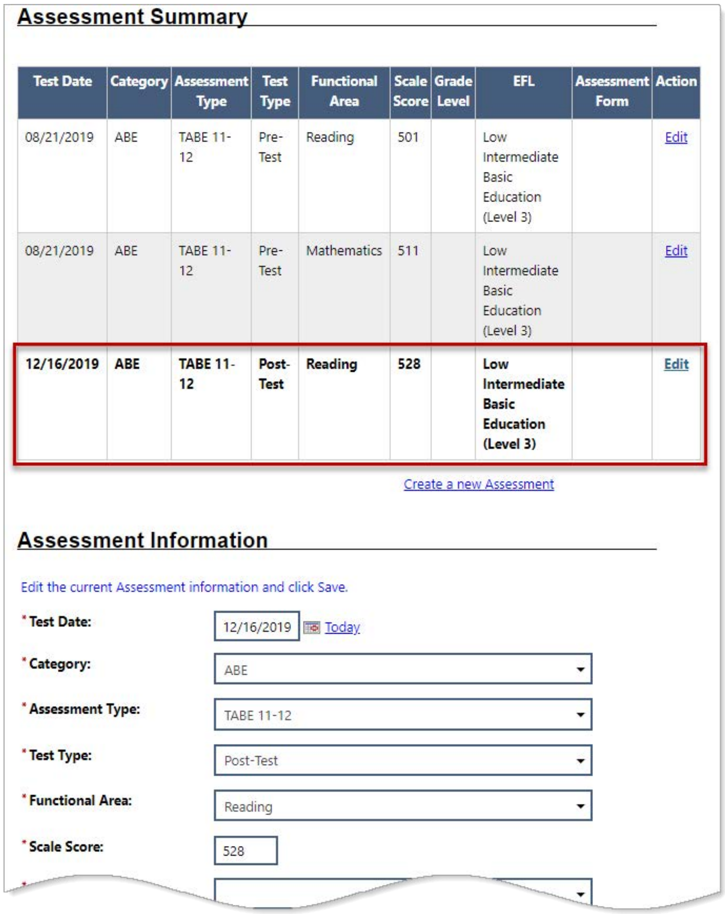
g. If available, you can enter the **Assessment Form** and **Level**.

h. Optionally, you can enter the **Grade Level** and **Comments**.

i. Click the **Save** button. The record is saved and added to the Assessment Summary table.

6 To edit an assessment record:

a. Click its Edit link in the Action column of the Assessment Summary table. That row will become bolded (see figure below) and the editable fields display under the table.


Assessment Summary

Test Date	Category	Assessment Type	Test Type	Functional Area	Scale Score	Grade Level	EFL	Assessment Form	Action
08/21/2019	ABE	TABE 11-12	Pre-Test	Reading	501		Low Intermediate Basic Education (Level 3)		Edit
08/21/2019	ABE	TABE 11-12	Pre-Test	Mathematics	511		Low Intermediate Basic Education (Level 3)		Edit
12/16/2019	**ABE**	**TABE 11-12**	**Post-Test**	**Reading**	**528**		**Low Intermediate Basic Education (Level 3)**		**Edit**

Create a new Assessment

Assessment Information

Edit the current Assessment information and click Save.

*Test Date: 12/16/2019 Today
*Category: ABE
*Assessment Type: TABE 11-12
*Test Type: Post-Test
*Functional Area: Reading
*Scale Score: 528

Editing an Assessment Record

b. Make any desired changes and click the **Save** button. The changes are saved.

7 To create and sign a printable Assessments form, in the Individual Signature section:

a. To create a PDF file of the Assessments form, check the **Create PDF** checkbox. This is available for sites with the Document Management module.

b. To include your staff signature, check the **Include Staff Signature** checkbox.

c. If your site has an electronic signature pad connected, and you want to capture the participant's signature, click the Applicant Signature link to launch the signature pad function, then **Save** it.

d. To print and/or download a PDF copy of the form, click the **Print** button.

8 To add more assessment results, repeat these steps.

Issuing High School Equivalency Vouchers

Staff can issue and monitor state-supplied High School Equivalency (HSE) Vouchers to fund a student's classes.

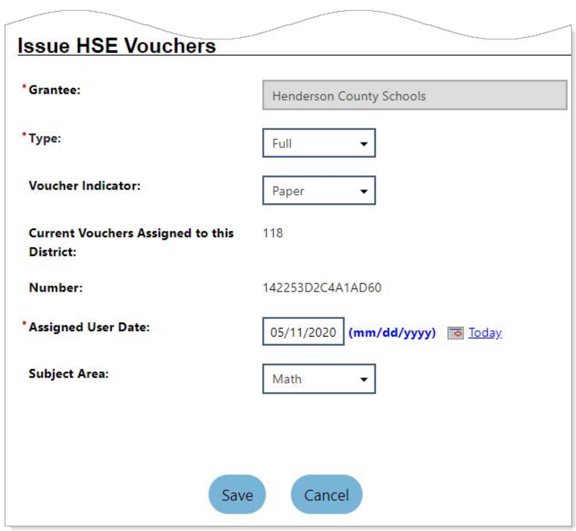
To issue an HSE voucher:

1. Find and assist the desired individual, then navigate to their Programs tab.

   Note: *See the topic "Assisting an Individual" in Chapter 3 - Manage Individuals for details on how to search for and assist clients, and the topic "Staff Profiles - Case Management Profile" in Chapter 4 - Individuals - Case Management to learn how to navigate to the Programs tab.*

2. On the individual's Programs tab, click the plus sign icon to expand their Adult Education Application section.

3. Click the plus sign icon to expand the High School Equivalency Vouchers panel and click the HSE Voucher link. The Issue HSE Vouchers page displays (see figure below).



Issue HSE Vouchers Page

4. Select the **Type** of voucher, *Full*, *Partial,* or *Site Fee*.

5. Select the **Voucher Indicator**, *Paper* or *Online*.

   As you make these selections, the **Current Vouchers Assigned to this District** and the vouchers tracking **Number** change dynamically.

6. Enter the **Assigned User Date** (defaults to current date).

7. Select the **Subject Area**.

8. Click the **Save** button. The Programs tab redisplays. The voucher is assigned to the student, who then uses it to take the High School Equivalency Exam.

9. To add another voucher, repeat these steps.

Recording Measurable Skills Gains

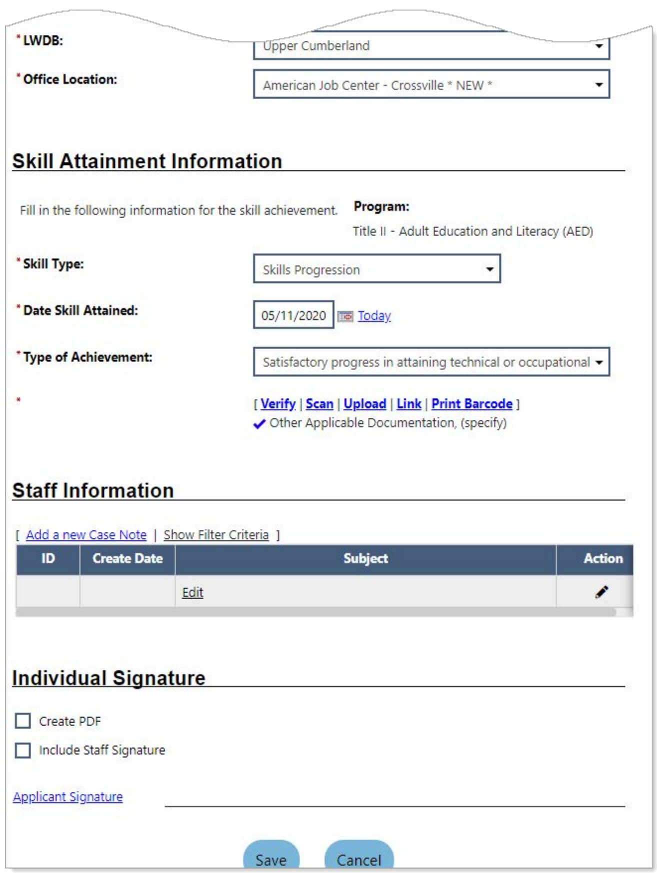
The Skill Achievement form is designed for use in programs where Measurable Skill Gains performance measures apply, including Title I WIOA, Title II Adult Education, Title III Wagner-Peyser, and Title IV Vocational Rehabilitation.

To record a Measureable Skills Gain for a client:

1. Find and assist the desired individual, then navigate to their Programs tab.

   Note: *See the topic "Assisting an Individual" in Chapter 3 - Manage Individuals for details on how to search for and assist clients, and the topic "Staff Profiles - Case Management Profile" in Chapter 4 - Individuals - Case Management to learn how to navigate to the Programs tab.*

2. On the individual's Programs tab, click the plus sign icon to expand their Adult Education Application section.
3. Click the plus sign icon to expand the Measureable Skills Gain panel and click the Create Measureable Skills Gain link. The Skill Achievement entry page displays (see figure below).



Skill Achievement Entry Page

4. Select/confirm the **LWDB** and **Office Location**.
5. In the Skill Attainment Information section, select the **Skill Type** attained.
6. Enter the **Date Skill Attained**.
7. Select the **Type of Achievement**. The following table displays the combination of skill types and achievement types available:

Skill Type	Achievement Type
Post-secondary Transcript/Report Card	• Completed minimum of 12 credit hours in semester and meets academic standards • Part-time student and completed at least 12 credit hours over the course of two completed consecutive semesters and meets academic standards
Secondary Transcript/Report Card	• Report card/transcript for one semester and meets academic standards
Training Milestone	• Achieved satisfactory or better progress reports towards an established OJT training milestone – not previously recorded • Completed 1 year of Registered Apprenticeship program and achieved satisfactory or better progress report • Other training milestone
Skills Progression	• Successfully completed a required exam for a particular occupation • Satisfactory progress in attaining technical or occupational skills as evidenced by trade-related benchmarks, such as knowledge-based exams • Other skills progression achievement
Credits Attained for EFL	• Secondary School Credits • Secondary School Carnegie Credits

8 Specify the achievement verification document by:

a. Clicking the Verify link.

b. Selecting the document type and entering the document title used for verification.

c. Clicking the Verify link again to collapse the list.

9 To add a case note, click the Add a new Case Note link in the Staff Information section, complete the applicable fields, and click **Save** to return to the previous page.

9 To create and sign a printable Skill Achievement form, in the Individual Signature section:

a. To create a PDF file of the form, check the **Create PDF** checkbox. This is available for sites with the Document Management module.

b. To include your staff signature, check the **Include Staff Signature** checkbox.

c. If your site has an electronic signature pad connected, and you want to capture the participant's signature, click the Applicant Signature link to launch the signature pad function, then **Save** it.

11 Click **Save** to complete the skills gain record. The Programs tab redisplays with a summary skills table.

12 To record another skill gain, repeat these steps.

Recording High School Equivalency/Practice Test Results

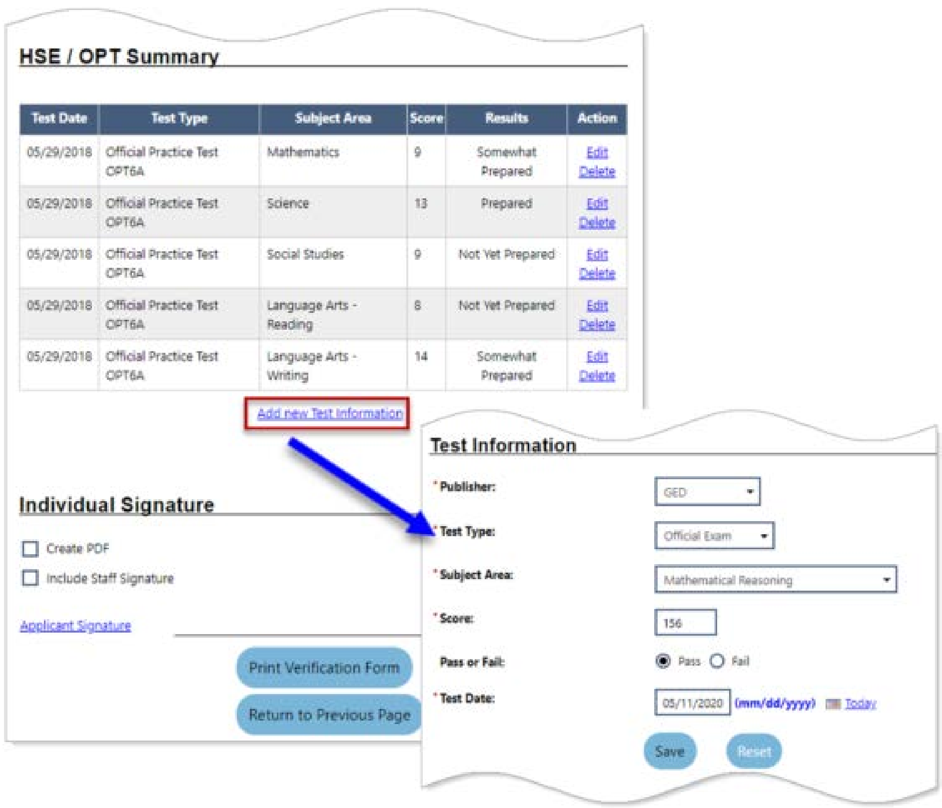
Staff can review or enter High School Equivalency/Oral Proficiency Test results, for both practice tests and official exams.

▶ **To record HSE/practice test results:**

1. Find and assist the desired individual, then navigate to their Programs tab.

   Note: *See the topic "Assisting an Individual" in Chapter 3 - Manage Individuals for details on how to search for and assist clients, and the topic "Staff Profiles - Case Management Profile" in Chapter 4 - Individuals - Case Management to learn how to navigate to the Programs tab.*

2. On the individual's Programs tab, click the plus sign icon ⊞ to expand their Adult Education Application section.
3. Click the plus sign icon ⊞ to expand the High School Equivalency/Practice Tests panel and click the View and Record HSE and OPT Results link. The Skill Achievement entry page displays (see figure below).



Practice Test Results Page

4. To enter new test results, click the Add new Test Information link. The Test Information section displays below the link (see figure above).
5. Select the test **Publisher**, **Test Type**, and **Subject Area**.
6. Enter the **Score** achieved.
7. Specify if the student was **Pass or Fail**.
8. Enter the **Test Date**.

9 Click **Save** to save the record. The results are added to the HSE / OPT Summary table and the entry section disappears.

10 To create and sign a printable verification form, in the Individual Signature section:

a. To create a PDF file of the form, check the **Create PDF** checkbox. This is available for sites with the Document Management module.

b. To include your staff signature, check the **Include Staff Signature** checkbox.

c. If your site has an electronic signature pad connected, and you want to capture the participant's signature, click the Applicant Signature link to launch the signature pad function, then **Save** it.

d. To print and/or download a PDF copy of the form, click the **Print Verification Form** button and use the controls in the display window.

11 To add more test results, repeat these steps.

Recording Credentials Earned

Staff can record information about the credentials a participant earns, for example, high school diploma or equivalency, college degrees, occupational licenses, and certificates.

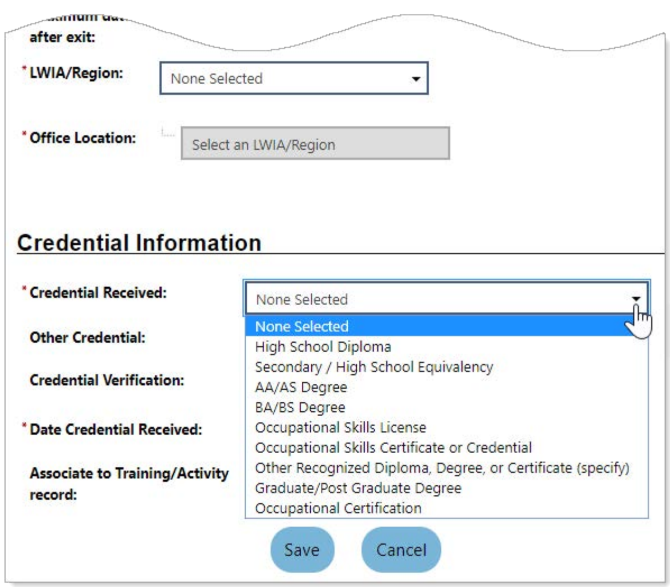
▶ **To record credentials earned:**

1 Find and assist the desired individual, then navigate to their Programs tab.

Note: *See the topic "Assisting an Individual" in Chapter 3 - Manage Individuals for details on how to search for and assist clients, and the topic "Staff Profiles - Case Management Profile" in Chapter 4 - Individuals - Case Management to learn how to navigate to the Programs tab.*

2 On the individual's Programs tab, click the plus sign icon to expand their Adult Education Application section.

3 Click the plus sign icon to expand the Credentials panel and click the Create Credential link. The Credential Information page displays (see figure below).



Credential Information Page

4 In the General Information section, select the applicable **LWIA/Region** and **Office Location**.

5 In the Credential Information section, select the **Credential Received** (see figure above for types).

6 If applicable, enter another credential or supporting information in the **Other Credential** field.

7 If desired, specify the credential verification document by:

   a. Clicking the Verify link.

   b. Selecting the document type used for verification.

   c. Clicking the Verify link again to collapse the list.

8 Enter the **Date Credential was Received**.

9 To associate the credential to any training/activity records the individual has recorded in their program record, click the **Search Activities/Services** link.

   a. From the Activities List in the pop-up window that displays, click the Select link to select the activity to associate. It is shown on the Credential Information page.

10 Click **Save** to save the record. The Programs tab redisplays with a credential summary table.

11 Once the record is saved, you can open the record by clicking on its link and add signatures, print or download a PDF version, or delete it.

12 To add another credential, repeat these steps.

Adding Employment

Staff can record detailed employer and job information for any employment the participant entered while active in the Adult Ed program.

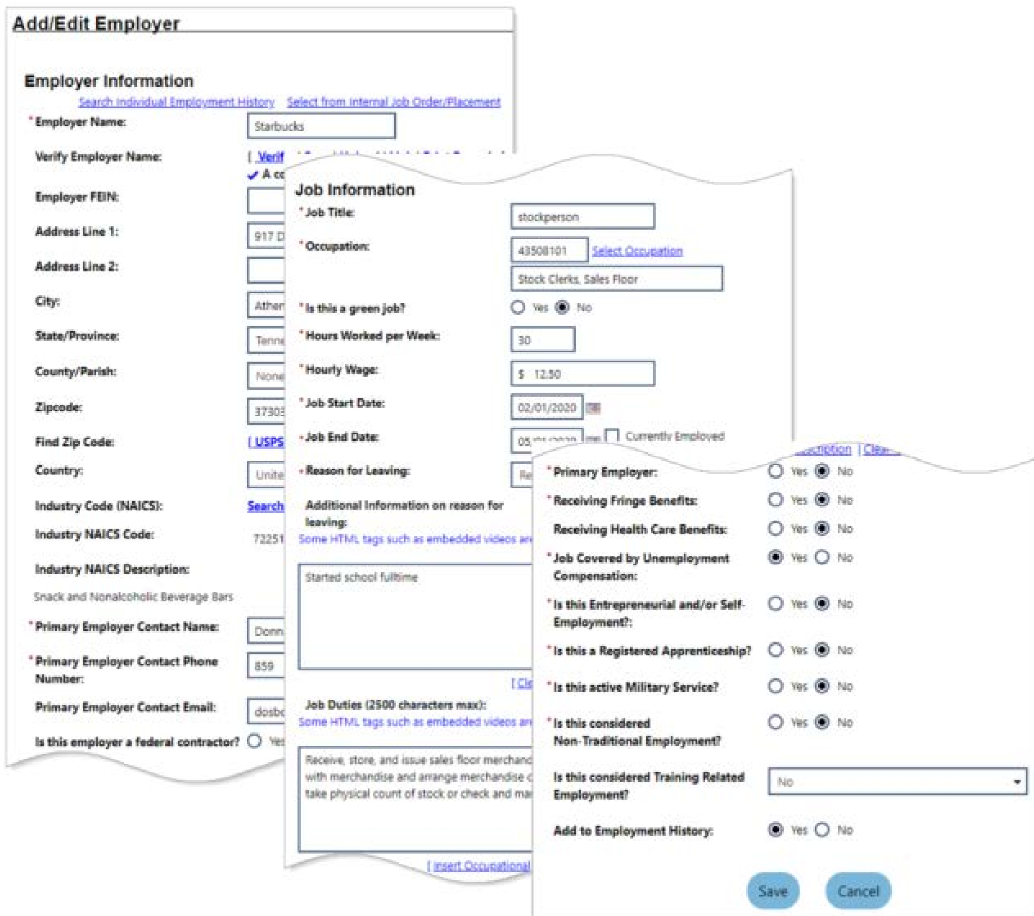
▶ **To add an employment record:**

1 Find and assist the desired individual, then navigate to their Programs tab.

Note: *See the topic "Assisting an Individual" in Chapter 3 - Manage Individuals for details on how to search for and assist clients, and the topic "Staff Profiles - Case Management Profile" in Chapter 4 - Individuals - Case Management to learn how to navigate to the Programs tab.*

2 On the individual's Programs tab, click the plus sign icon ⊞ to expand their Adult Education Application section.

3 Click the plus sign icon ⊞ to expand the Add Employment panel and click the Add Employment link. The Add/Edit Employer page displays (see figure below).



Add/Edit Employer Page

4 Enter the **Employer Name**. As you type, a list of matching employers will display; click on the matching employer to auto-fill the name, address, and contact information fields.

   a. Alternative ways to find an existing employer and auto-fill the field are by using either of the links above the field, Search Individual Employment History, which will display any employers previously entered as part of the individual's background, or Select from Internal Job Order/Placement, which will display any employers the individual was previously referred to for a job opening.

5 To **Verify Employer Name** with a verification document:

   a. Click the Verify link.

   b. Select the document type used for verification.

   c. Click the Verify link again to collapse the list.

6 Complete any other required fields, or those which you can complete, in the Employer Information section.

7 In the Job Information section, complete all required fields, and those which you can complete, pertaining to the position itself.

   a. To enter the **Occupation**, you must click the Select Occupation link, enter or search for a matching occupation, and its O*NET code will be auto-filled.

b. To add the employer to the individual's employment history as part of their profile, click *Yes* to **Add to Employment History**.

8 Click **Save** to save the employment record. The Programs tab redisplays with the employment entry listed in a summary table.

9 To add another employment record, repeat these steps.

Completing a Program Closure

Adult Ed has a separate "soft exit" process that runs nightly and auto-closes program enrollments after 90 days of no open services or class attendance hours. This accommodates open co-enrollment in the Workforce Innovation and Opportunity Act Title I and III and Trade Adjustment Assistance programs.

A student's Last Attended Date drives the soft exit process. After 45 days of no attendance, the student class registration status changes to *Inactive*; if student starts attending again any time between day 46 and 90, the status changes back to *Active*; if they do not attend for 90 days, soft exit begins.

Staff have the ability to close a case manually before the soft exit completes, as long as there are no open activities, for example, if the student receives a High School Equivalency credential. Staff can specify if the individual achieved any secondary outcome measures, as well, in accordance with the National Reporting Service guidelines.

▶ **To complete a program closure:**

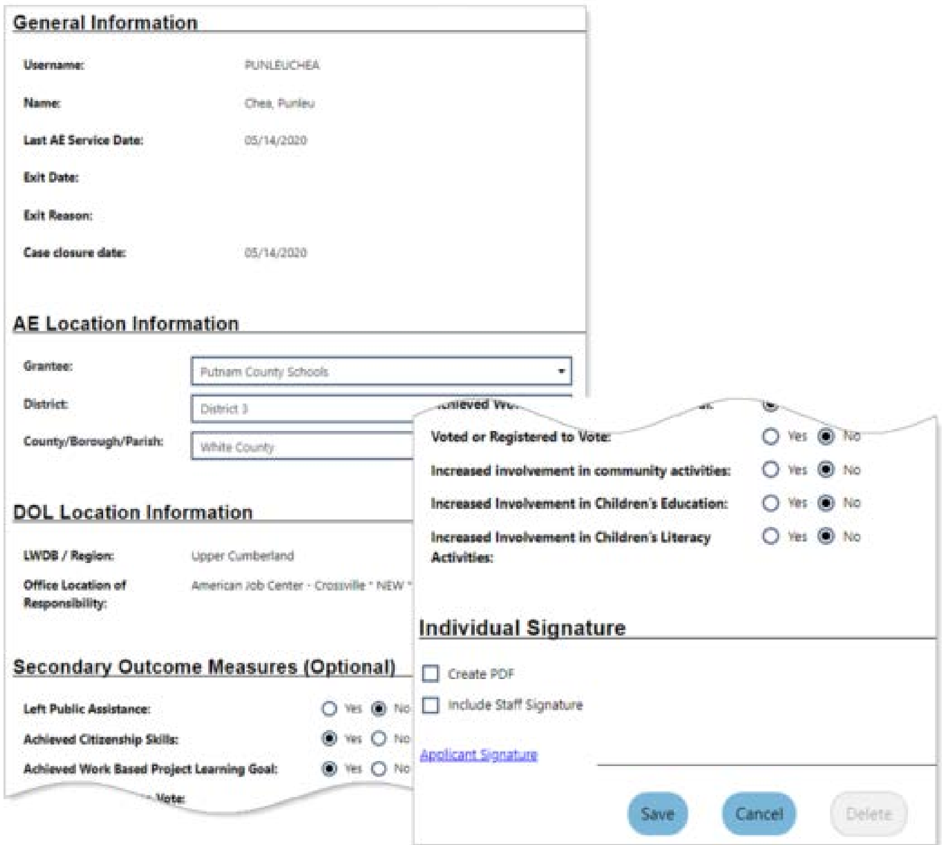
1 Find and assist the desired individual, then navigate to their Programs tab.

Note: *See the topic "Assisting an Individual" in Chapter 3 - Manage Individuals for details on how to search for and assist clients, and the topic "Staff Profiles - Case Management Profile" in Chapter 4 - Individuals - Case Management to learn how to navigate to the Programs tab.*

2 On the individual's Programs tab, click the plus sign icon ⊞ to expand their Adult Education Application section.

3 Close any open activities. See the topic "Closing an Activity, Enrollment or Service" earlier in the chapter for details.

4 Click the plus sign icon ⊞ to expand the Closure panel and click the Create Closure link. The Closure Information page displays (see figure below).



Closure Information Page

5 In the AE Location Information section, verify or change the **Grantee**, **District**, or **County/Borough/Parish** as needed.

6 In the Secondary Outcome Measures section, you can indicate if the participant achieved any of those reportable outcome measures, such as leaving public assistance, registering to vote or voting, achieving a work-based project learning goal, or increasing their involvement in various community or children's literacy activities.

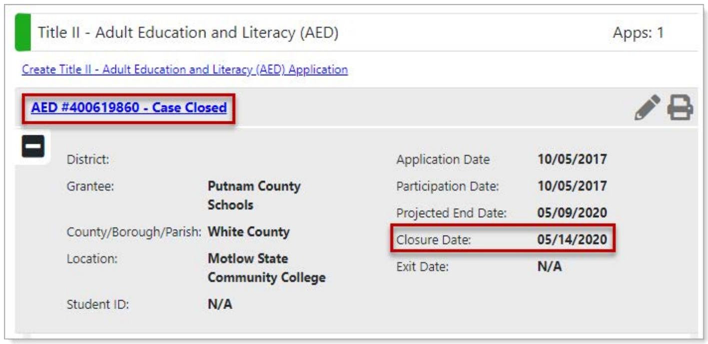
7 To create and sign a printable Case Closure form, in the Individual Signature section:

   a. To create a PDF file of the form, check the **Create PDF** checkbox. This is available for sites with the Document Management module.

   b. To include your staff signature, check the **Include Staff Signature** checkbox.

   c. If your site has an electronic signature pad connected, and you want to capture the participant's signature, click the Applicant Signature link to launch the signature pad function, then **Save** it.

8 Click **Save** to complete the closure. The Programs tab redisplays with the program status changed to *Case Closed* and the closure date recorded (see figure below).



Case Closed

Completing a Program Hard Exit/Outcome

Staff can officially terminate program participation at any time if an individual satisfies one of the federally established global exclusions, which will exclude a participant from being counted in Common Measures for performance tracking purposes. All open activities must be closed. No follow-ups are required for these exited individuals. See the figure below for the list of global exclusion exit reasons.

▶ **To complete a hard exit:**

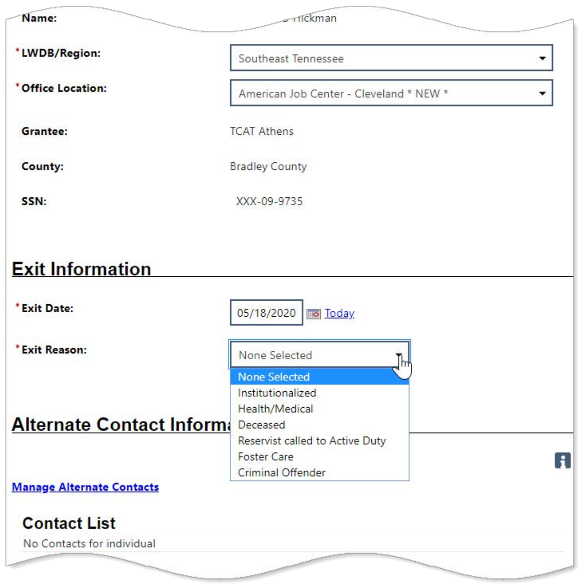
1 Find and assist the desired individual, then navigate to their Programs tab.

Note: *See the topic "Assisting an Individual" in Chapter 3 - Manage Individuals for details on how to search for and assist clients, and the topic "Staff Profiles - Case Management Profile" in Chapter 4 - Individuals - Case Management to learn how to navigate to the Programs tab.*

2 On the individual's Programs tab, click the plus sign icon to expand their Adult Education Application section.

3 Close any open activities. See the topic "Closing an Activity, Enrollment or Service" earlier in this chapter for details.

4 Click the plus sign icon to expand the Exit / Outcome panel and click the Create Exit/Outcome link. The Exit page displays (see figure below).



Exit Page with Global Exclusion Exit Reasons

5 In the General Information section, verify or change the client's **LWDB/Region** and **Office Location**.

6 In the Exit Information section, enter the **Exit Date**.

7 Select the **Exit Reason** (see examples in figure above).

8 To make additions or changes to the individual's contacts, in the Alternate Contact Information section, click the Manage Alternate Contacts link, or an Edit link, and add or change entries as needed.

9 To add a case note, in the Staff Information section, click the Add a new Case Note link, complete the applicable fields, and click **Save** to return to the previous page.

10 To manage case assignment, click one of the following links:

- To assign the client to a fellow case manager, click Assign Case Manager.
- To assign the client to yourself, click Assign Me.
- To unassign the current case manager, click Remove Case Manager Assignment.
- If desired, add any **Comments** in the space provided.

11 To create and sign a printable Exit form, in the Individual Signature section:

a. To create a PDF file of the form, check the **Create PDF** checkbox. This is available for sites with the Document Management module.

b. To include your staff signature, check the **Include Staff Signature** checkbox.

c. If your site has an electronic signature pad connected, and you want to capture the participant's signature, click the Applicant Signature link to launch the signature pad function, then **Save** it.

12 Click **Save** to complete the Exit record. The Programs tab redisplays with the program status changed to *Case Exited* and showing the exit date and reason.

Entering Quarterly Follow-up Information

Staff must enter follow-up information for a participant for the second and fourth quarters after the exit quarter. This can include employment and wage information and contact attempts with the participant, as well as specify if the individual achieved any secondary or family literacy outcome measures in accordance with the National Reporting Service guidelines.

Note: *There are no follow-up activity services codes for the Adult Education program.*

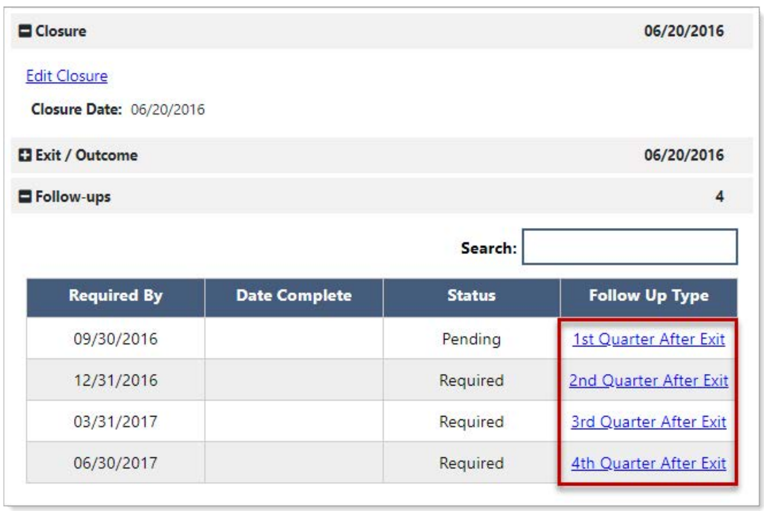
▶ To enter follow-up information :

1. Find and assist the desired individual, then navigate to their Programs tab.

   Note: *See the topic "Assisting an Individual" in Chapter 3 - Manage Individuals for details on how to search for and assist clients, and the topic "Staff Profiles - Case Management Profile" in Chapter 4 - Individuals - Case Management to learn how to navigate to the Programs tab.*

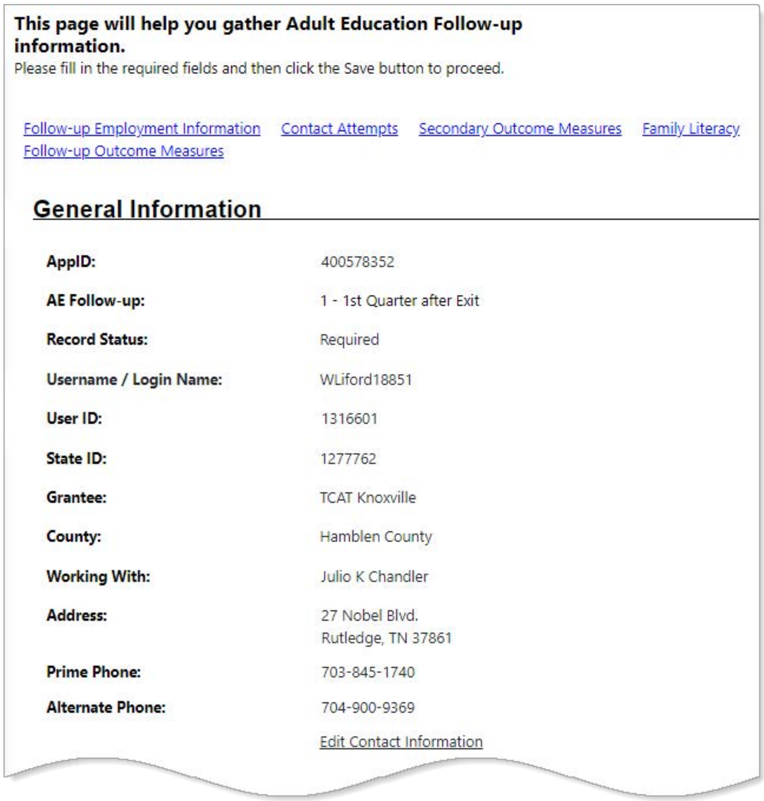
2. On the individual's Programs tab, click the plus sign icon to expand their Adult Education Application section.

3. Click the plus sign icon to expand the Follow-ups panel. A table displays with links to each quarter after exit (see figure below).



Follow-ups Panel

4. Click a Quarter After Exit link to enter data for it. The Adult Education Follow-up page displays, with jumps links at the top to move down to specific sections of the page (see figure below).



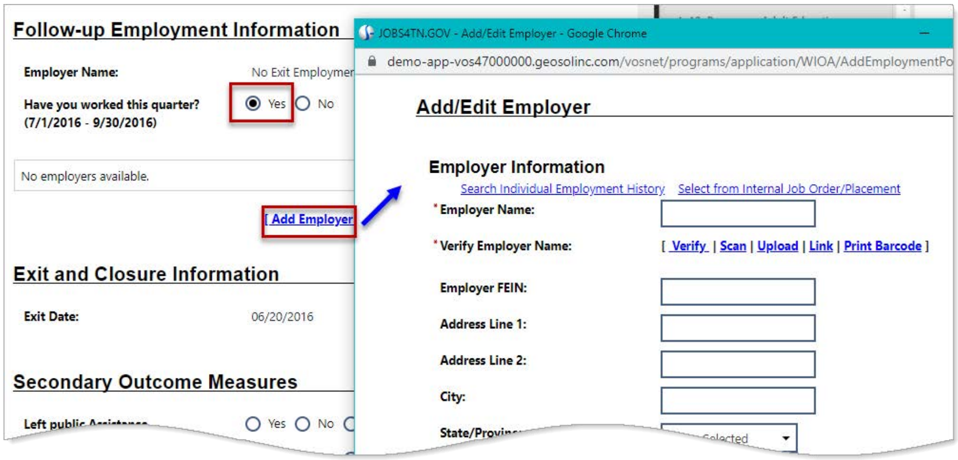
Adult Education Follow-up Page

5 To record failed attempts to contact the participant, in the Contact Attempts section, click the **Attempt Contact** link. Entry fields display below the table area (see figure below).

Contact Attempts Entry Fields

a. Complete the required fields, then click the **Add New Contact Attempt** button to add it to the listing table (see figure above).

6 To enter employment information for the quarter, in the Follow-up Employment Information section, click *Yes* for **Have you worked this quarter?** (see figure below).

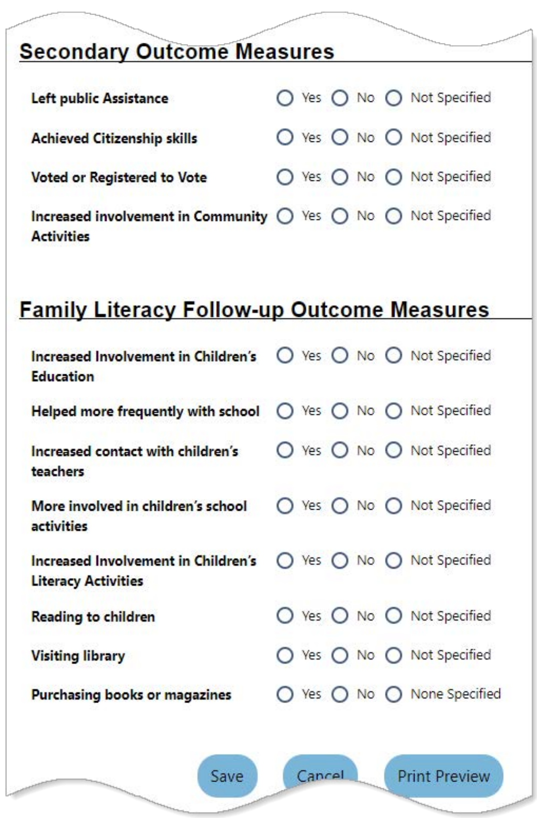


Adding Employment Information

a. If it is with the same employer from the previous quarter, check the box for **Use primary employer from previous quarter?**, then verify the employer's name as prompted.

b. Click the **Add Employer** link. The Add/Edit Employer page displays in a pop-up window (see figure above). This is the same page as covered in the topic "Adding Employment".

7 Indicate the status of the Secondary and Family Literacy Outcome Measures as desired (see figure below).

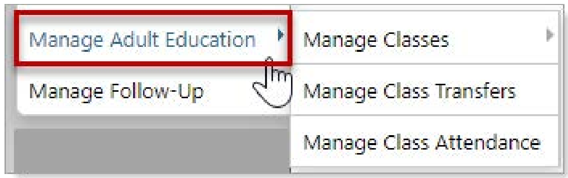


Secondary and Family Literacy Outcome Measures

8 Click **Save** to save the record. The Programs tab redisplays with that quarter's status changed from *Required* to *Completed* in the Follow-ups panel.

Managing Adult Education

Staff can manage classes, transfers, and class attendance at a higher level than when assisting an individual. These options are accessed from the Services for Workforce Staff menu group in the left navigation menu by clicking the Manage Adult Education option (see figure below).



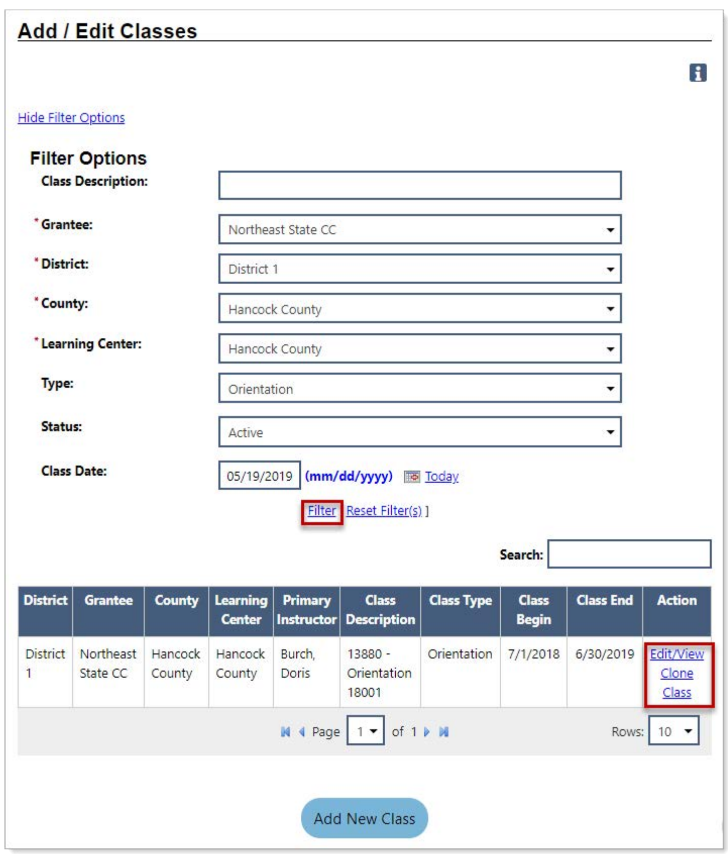
Manage Adult Education Menu Options

Creating and Editing Classes

Staff must create the classes first so that students can then be registered in them. Staff can add or clone new classes or edit existing ones.

▶ **To create a new class:**

1 From the Services for Workforce Staff menu group in the left navigation menu, click **Manage Adult Education ▸ Manage Classes ▸ Create/Edit Classes**. The Add/Edit Classes page displays (see figure below). You can filter existing classes to find one to edit or clone.



Add/Edit Classes Page

2 To search for classes to edit or clone:

a. In the Filter Options section, select filter options to limit displayed classes to select from.

b. Only enter a **Class Description** if you are sure that term is used in the Class Description title; otherwise, it may limit any matching classes.

c. If desired, enter a **Class Date** to limit classes to those whose date range includes this date.

d. Click the Filter link (see figure above). The system searches for matching classes and displays any found in a table (see figure above).

3 To edit (or view) a class:

a. Click its Edit/View link in the Action column. The Create/Edit Class page displays with the class details, including its system-assigned Class ID.

b. Make any desired changes and click **Save**. The Add/Edit Classes page redisplays.

4 To clone (copy) a class:

a. Click its Clone Class link in the Action column. The Create/Edit Class page displays with the class details.

b. Enter a **Class Description** for the new class.

c. Make any other desired changes, making sure all required fields are complete. For DE classes (Distance Ed), you don't need to enter Meeting Days and Times.

d. Click **Save**. The new class is created and the Add/Edit Classes page redisplays.

5 To create a new class from scratch:

a. Click the **Add New Class** button at the bottom of the Add/Edit Classes page. The Create/Edit Class page displays (see figure below).

Create/Edit Class Page

b. Complete all required fields. Some items to note:

- Typically, **Grantee** or **District** is the class provider.
- For *Distance Education* **Class Attendance Type**, you don't need to enter Meeting Days and Times.
- For *Face to Face* **Class Attendance Type**, you can select the days on which the class is to be held and enter the **Start** and **End** times for the meeting day, and remember to include AM or PM. You can also use the clock time picker tool to enter your times.

  Alternatively, for classes with uniform meeting times, you can enter in the times for one day first, and then check off additional meeting days. This will automatically populate the time entries into the fields for the additionally checked days.

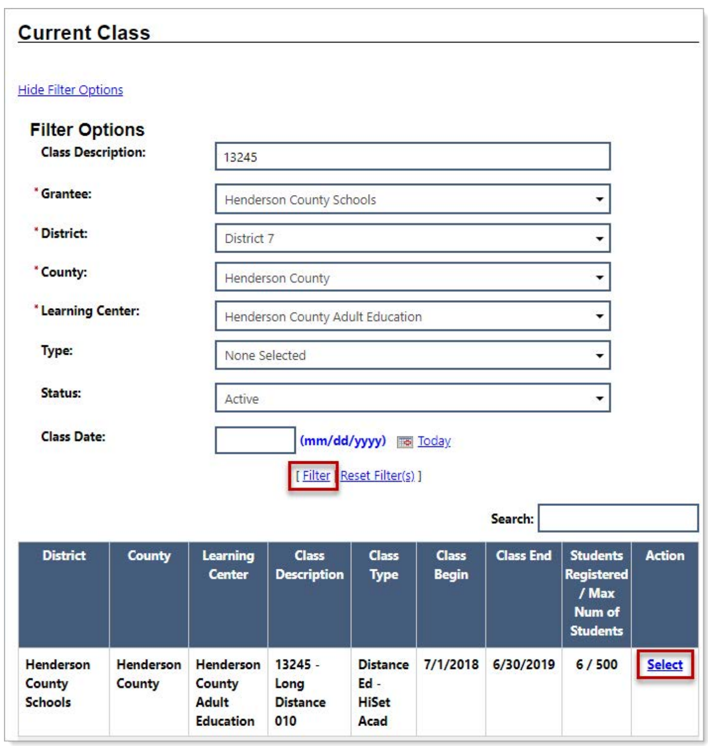
c. Click **Save**. The new class is created and the Add/Edit Classes page redisplays.

Transferring Multiple Students from One Class to Another

Staff can bulk transfer multiple students between two existing classes. An example of when this might be done is if the instructor, location, or grantee was no longer available for that class.

▶ **To transfer multiple students between two existing classes:**

1 From the Services for Workforce Staff menu group in the left navigation menu, click **Manage Adult Education ▸ Manage Class Transfers**. The Current Class page displays (see figure below).


Current Class

Hide Filter Options

Filter Options

Class Description: 13245

*Grantee: Henderson County Schools

*District: District 7

*County: Henderson County

*Learning Center: Henderson County Adult Education

Type: None Selected

Status: Active

Class Date: (mm/dd/yyyy) Today

[Filter Reset Filter(s)]

Search:

District	County	Learning Center	Class Description	Class Type	Class Begin	Class End	Students Registered / Max Num of Students	Action
Henderson County Schools	Henderson County	Henderson County Adult Education	13245 - Long Distance 010	Distance Ed - HiSet Acad	7/1/2018	6/30/2019	6 / 500	Select

Current Class Page

2 To search for the class to transfer *from*:

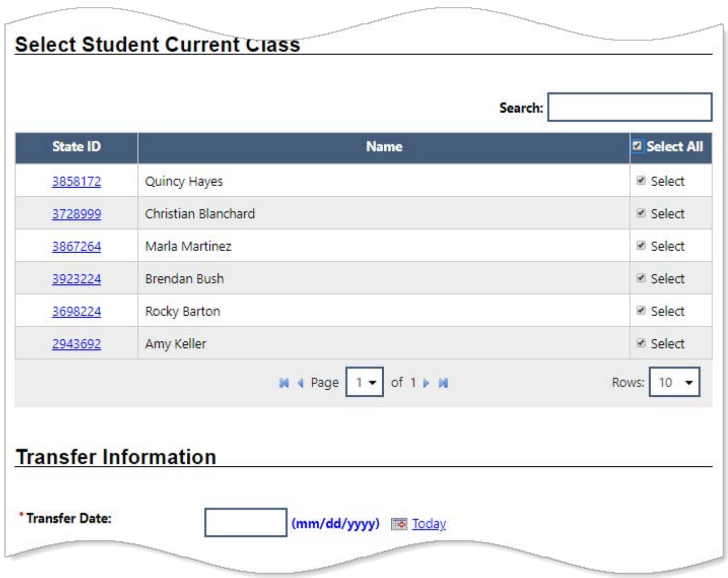
a. In the Filter Options section, select filter options to limit displayed classes to select from.

b. Only enter a **Class Description** if you are sure that term is used in the Class Description title; otherwise, it may limit any matching classes.

c. If desired, enter a **Class Date** to limit classes to those whose date range includes this date.

d. Click the Filter link (see figure above). The system searches for matching classes and displays any found in a table (see figure above).

3 Click the Select link in the Action column for the desired class to transfer from (see figure above). That row becomes bolded and the list of current students displays below the table (see figure below).



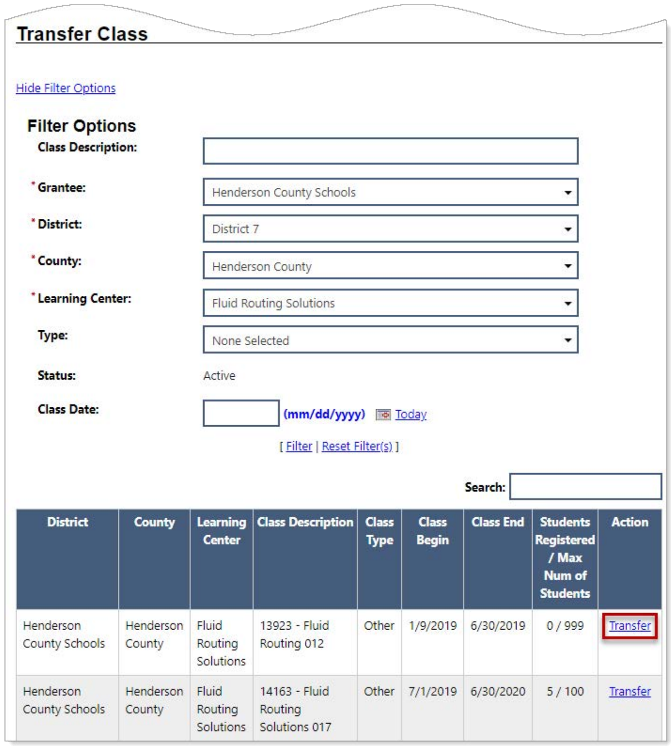
Selecting Students to Transfer

4 Check the **Select** checkboxes for the students transfer; click **Select All** to select all students at one time.

5 Enter the **Transfer Date**, which must fall within the start and end dates of the new class.

6 To search for the class to transfer *to*:

a. In the Transfer Class section, select filter options, then click the Filter link to display matching classes (see figure below).



Transfer Class

Hide Filter Options

Filter Options

Class Description:	
* Grantee:	Henderson County Schools
* District:	District 7
* County:	Henderson County
* Learning Center:	Fluid Routing Solutions
Type:	None Selected
Status:	Active
Class Date:	(mm/dd/yyyy) Today

[Filter | Reset Filter(s)]

Search:

District	County	Learning Center	Class Description	Class Type	Class Begin	Class End	Students Registered / Max Num of Students	Action
Henderson County Schools	Henderson County	Fluid Routing Solutions	13923 - Fluid Routing 012	Other	1/9/2019	6/30/2019	0 / 999	Transfer
Henderson County Schools	Henderson County	Fluid Routing Solutions	14163 - Fluid Routing Solutions 017	Other	7/1/2019	6/30/2020	5 / 100	Transfer

Transfer to Class Selection

7 Click the Transfer link for the desired class. A pop-up alert appears to let you know the transfer was successful.

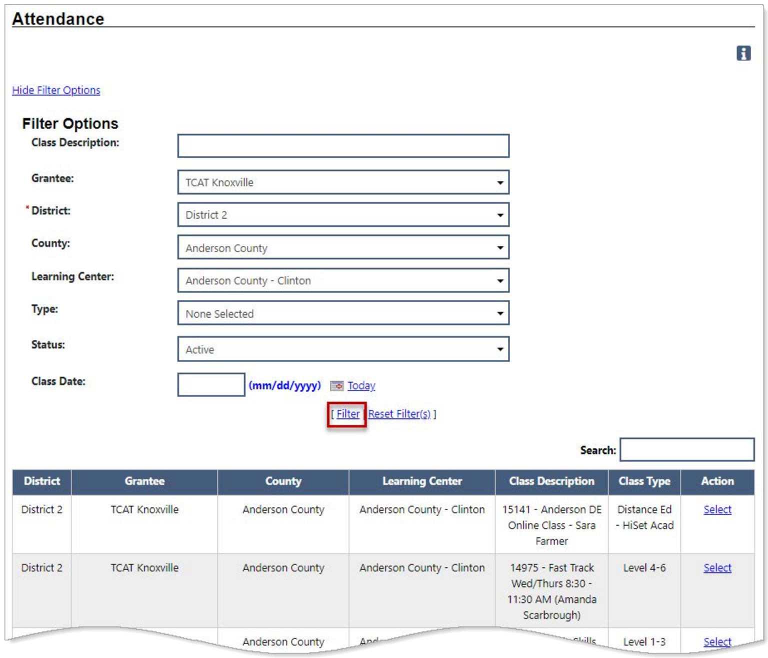
8 Click **OK** to confirm. The Current Class page redisplays.

Managing Class Attendance for Multiple Students

Staff can bulk enter attendance times for all students attending a class, as well as download and print a class roster.

▶ **To manage class attendance for multiple students:**

1 From the Services for Workforce Staff menu group in the left navigation menu, click **Manage Adult Education ▸ Manage Class Attendance**. The Class Attendance page displays (see figure below).



Class Attendance Page

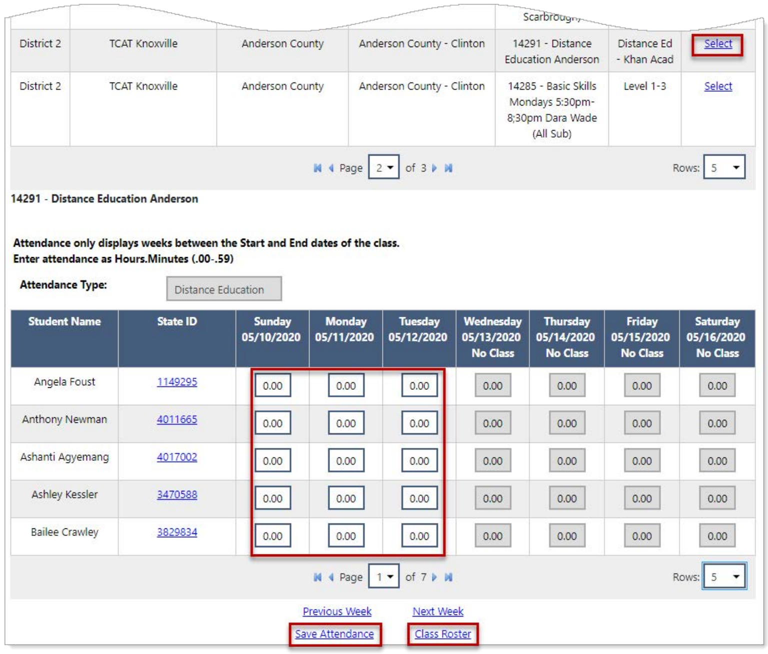
2 In the Attendance section, select filter options to limit displayed classes to the desired locations and type.

3 Only enter a **Class Description** if you are sure that term is used in the Class Description title; otherwise, it may limit any matching classes.

4 If desired, enter a **Class Date** to limit classes to those whose date range includes this date.

5 Click the Filter link to display a table of all the class search results (see figure above).

6 Find the class you wish to add attendance hours for and click its Select link in the Action column. A list of all students enrolled in that class displays (see figure below).



Manage Class Attendance Page

7 Enter each of the student's attendance time in *hours.minutes* (.00-.59) for the applicable dates.

a. If necessary, use the Previous Week and Next Week links below the table to move backward and forward in time.

b. Use the page forward and backward arrows to move through multiple pages of students.

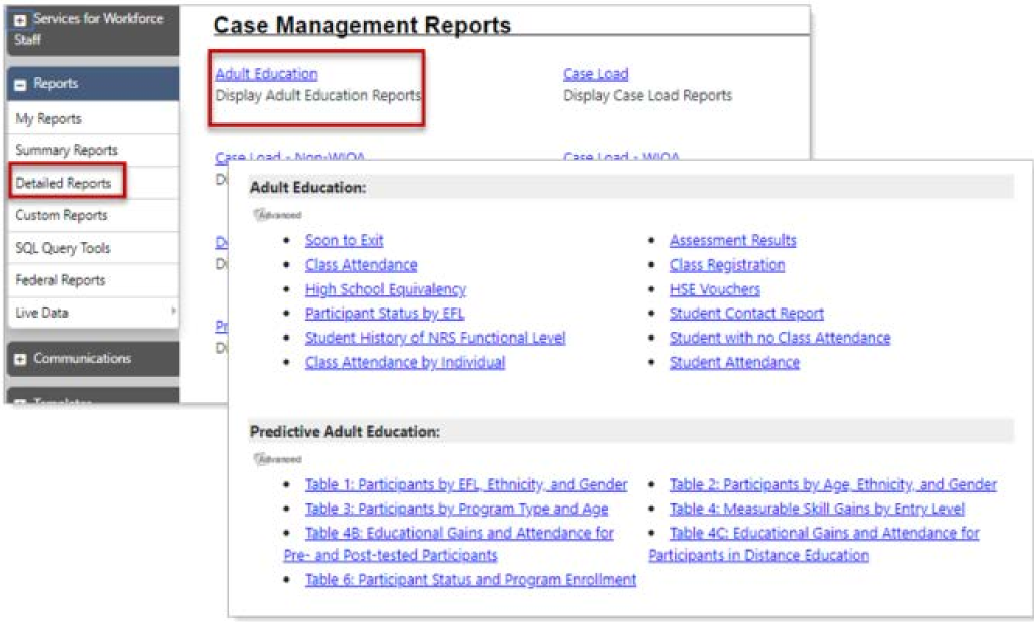
8 Click the Save Attendance link below the table to save the records.

9 To download or print a PDF version of the class roster, click the Class Roster link below the table.

Adult Education Reports

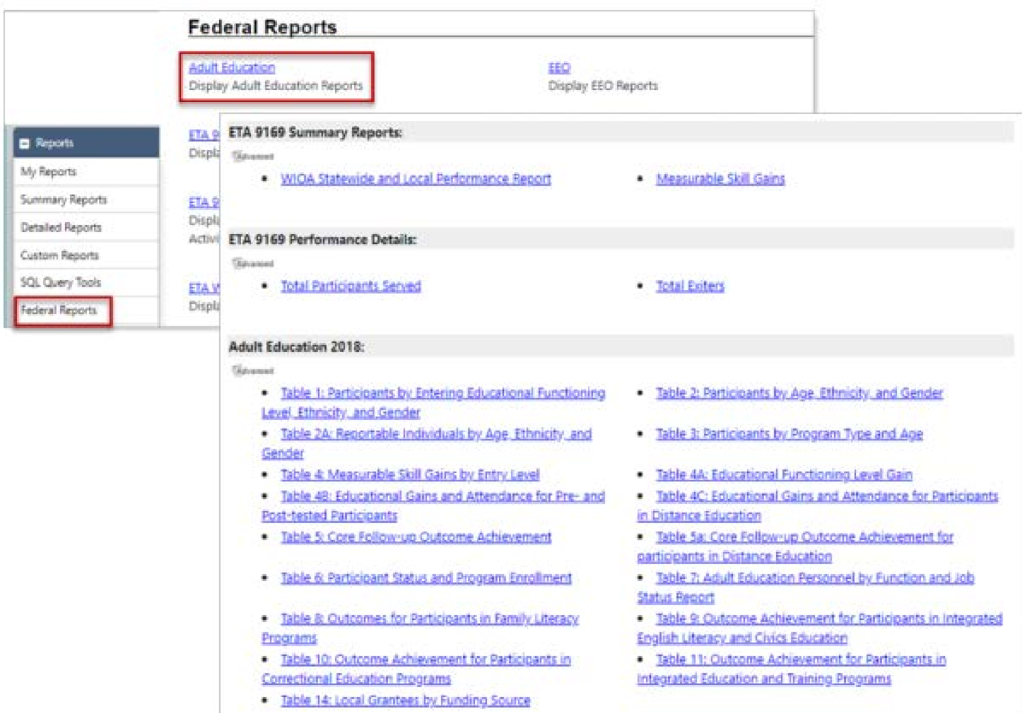
Adult Education Reports are located in the Case Management Reports section of Detailed Reports and under Federal Reports. There are almost 20 to choose from, offering data on class and student attendance, registrations, HSE tests and vouchers, Educational Functioning Levels and Measurable Skills Gains, and a wide variety of participant demographics-related tables.

Detailed Reports



Detailed Adult Education Reports

Federal Reports



Federal Adult Education Reports