Recovery Act Data (RAD) System
User Guide

U.S. Department of Labor
Employment & Training Administration

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Getting Started

Introduction

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

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

Frequently Asked Questions

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13. Who can upload attachments, enter remarks, certify, and submit the QPR?

1. ***How do I request technical assistance?***
As of November 22, 2010, all email regarding RAD technical assistance questions or RAD action items should be sent to the Applications Support Help Desk at appsupport.ebss@dol.gov. Previously, RAD email messages were sent to the Green Jobs mailbox. Please be sure to send all of your RAD questions to the Applications Support Help Desk at the email address listed above, as this will help us ensure questions are received and responded to in a timely manner. Be sure to include your grant number, grant name, and specific details regarding your request. For program related questions, grantees should contact their respective Federal Project Officer (FPO).

2. ***How do I edit a participant name or SSN?***
Due to DOL/ETA security procedures, some information in RAD becomes encrypted after it is saved. This information includes: participant first and last name and social security number (SSN).

- An enhancement to the RAD System provides for updating a participant's name - to do so, the Authorized Grantee Representative, Administrator, Area Case Manager, or Case Manager should log in to RAD, choose to Edit the participant's record and make the desired first or last name updates.

- The SSN cannot be edited after it is saved to the participant's record. The only way to change the SSN is to have the Authorized Grantee Representative or Administrator log in to RAD, choose to **Delete** the participant's record, and then re-enter the participant's record.

3. ***How do I delete a participant?***
An enhancement to the RAD System allows Authorized Grantee Representatives or Administrators the functionality for deleting **active** participants. The appropriate Authorized Grantee or Administrator for a participant can log in to RAD, navigate to the participant's **Summary** page and select the **Delete Participant** process. Caution should be exercised since the **deleted** participant cannot be recovered. Please ensure that any impacted Quarterly Progress Reports are resubmitted.

4. ***Why are participants being Auto-Exited?***
In accordance with the OMB-approved reporting requirements and definitions, an exiter is a participant that has gone 90 consecutive days without receiving a grant-funded service. Therefore, participants are auto-exited in RAD after 90 days have passed from the end date of their latest service, regardless of whether or not they have successfully completed the program.

For example, if a participant has a grant-funded service with a start date of 6/10/2010 and an end date of 8/15/2010, and no other Education/Job Training or Other Grant-Funded Services are added to the participant's file, the participant would be exited automatically by RAD 90 days after 8/15/2010 - which would be 11/13/2010. Once exited, a participant's status changes from "Active" to "Exited." The RAD Auto-Exit process runs daily at 2:00am EST – it identifies and exits any participants that qualify as exiters.

5. ***How do I prevent an exit in RAD?***
To prevent a participant from being exited by RAD, users can create one of the following:

- Add an Education/Job Training Activity or Other Grant-Funded Service to a participant's file before 90 days has elapsed since the end date of the participant's latest activity or service.

- Add a Gap-in-Service, which puts a hold for up to 180 days on a participant's status and prevents exit. The participant must intend to return to grant-funded activities once the Gap in Service ends and must meet one of the following criteria: 1) delay before beginning of training (e.g., a summer break), 2) health/medical reasons or family care, or 3) temporary move from the area.

6. ***How do I reactivate a participant?***
   If a participant was auto-exited in RAD, but needs to be reactivated for activity/service updates or eligible Gap in Service, the participant's status can be reactivated and updated.

   An enhancement to the RAD System allows Authorized Grantee Representatives or Administrators the functionality for reactivating an exited participant. The Authorized Grantee Representative or Administrator can log in to the RAD System, navigate to the participant's Summary page and select the **Reactivate** process. The reactivated participant's files should be updated the same day of reactivation; otherwise, the participant may be re-exited during the auto-exit process that runs nightly. Please ensure that any impacted Quarterly Progress Reports are resubmitted.

7. **Can I Manual Exit a Participant?**
   If a participant was auto-exited in RAD, but meets one of the criteria for a "Manual Exit," (e.g., Health or Medical, Deceased, Family Care, Military, Institutionalized, Transferred or Relocated), how do I manually exit them?

   This function is no longer available in RAD. However, you may send the participant's ID number in an email to the Applications Support Help Desk at appsupport.ebss@dol.gov with the participant's ID number and request that the participant's status be changed to "Manual Exit." **Note:** participants that meet the criteria for a manual exit are still auto-exited in RAD after 90 days have passed from the end date of their latest service, regardless of whether they have successful program completion. The purpose of requesting a manual exit is to identify that the participant meets one of the criteria for a "Manual Exit" and should not be tracked by ETA for the purposes of reporting Common Performance Measure Results.

8. ***Can I edit participant grant-funded services?***
   All users (except Read-Only) have the ability to change a start date and end/completion date for active participants for their Education/Job Training Activities, Other Grant-Funded Services and Program Information. A Grantee, Administrator, Area Case Manager, and Case Manager may change an activity start or end date by opening the activity and updating the "Date Began" or "Date Ended" field.

9. ***How do I delete an activity or change the "Date of Intake?"***
   - An enhancement to the RAD System allows the Authorized Grantee Representative, Administrator, Area Case Manager, and Case Manager to log in to RAD, navigate to the participant's Summary page, select an existing activity or grant-funded service and select the delete activity or delete service process for an assigned participant.

- The new release that was applied to the RAD System on December 22, 2010 included a change from “Date of Participation” to “Date of Intake.” This change occurred because there was a disconnect between the “Date of Participation” in the RAD System and the “Date of Participation” as described in the ARRA HGEI Reporting Glossary and Guide. This disconnect has been the cause of a lot of confusion when doing data entry in RAD.

  This issue has been resolved by changing the “Date of Participation” to “Date of Intake.” The “Date of Intake” now is simply the date that the participant file is created in RAD and has no ties to any of the other dates in the system. So, if the participant has activity dates that pre-date the “Date of Intake,” you will still be able to input these activities (this previously was not the case). Although, now, there is no field to record the original date that the participant was actually seen for intake into the program, you would be able to make note of this date in the Notes tab.

10. ***How do I select “Yes” for Program Information field, “Has the participant successfully completed the program?”***
In accordance with OMB-approved reporting requirements and definitions, a “successful completer” is a participant that has successfully completed an Education/Job Training program. The “Yes” option for successful completion will not become available for a participant until an Education/Job Training Activity has been added to their file and that activity has been completed (this is accomplished by entering an end date for the Education/Job Training Activity).

If you are trying to report that a participant has successfully completed and the "Yes" option is not available, verify that an Education/Job Training Activity has been reported for the participant and that an end date has been entered for that Education/Job Training Activity. **Please Note:** after you save a "Yes" in the successfully completed? field, the RAD System does not allow you to change the indicator back to "No" or null.

11. ***What if I am having trouble logging in to the RAD System? I have my RAD System ID and password.***
If you are experiencing issues logging in to RAD with your password, please ensure you are logging in on the correct login page. Authorized Grantee Representatives (also known as Grant Signatories) have a unique login page specific for their account access type: https://www.etareports.doleta.gov.

Administrators, Area Case Managers, Case Managers, and Read-Only access users will log in using this link: https://www.etareports.doleta.gov/ cfdocs/grantee_prod/ reporting/ BRG_Green_RAD.

12. What if I lose or forget my RAD System password?

ETA is only able to reissue RAD pins and passwords to the Authorized Grantee Representative (Grant Signatory). All other RAD user accounts are set up by either the Authorized Grantee Representative or Administrators. ETA does not have access to these accounts. Complete instructions for requesting your RAD System password are provided under the section, Log in to RAD System**.** If, after reading that section, you are still unable to log in, please contact your grant's Administrator or Grant Signatory.

13. Who can upload attachments, enter remarks, certify, and submit the QPR?

Only the Authorized Grantee Representative can perform these tasks. These QPR functions are only displayed when the Authorized Grantee Representative logs in to the RAD System. The uploaded attachments and remarks are only saved to the Quarterly Progress Report when the Authorized Grantee Representative enters the PIN and clicks Submit.

User Roles

The RAD System has five types of user roles:

- **Authorized Grantee Representative** (aka Official Grant Recipient or Grant Signatory)
  This user has the ability to create and modify users, make a user inactive or active, create and modify participants, view all users and participants, upload narrative reports, generate the ETA-9153 Form from data entered in the RAD System, and submit and certify the Quarterly Progress Reports. They have access to all RAD reports, and may include the participant caseload for all Administrators, Area Case Managers and Case Managers. Authorized Grantee Representatives can transfer participants to other Administrators, Area Case Managers, or Case Managers. They can also transfer Case Managers to Area Case Managers.

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

- **Area Case Manager**
  An Area Case Manager manages a subset of Case Managers that are assigned by an Authorized Grantee Representative or Administrator. The Area Case Manager has the same rights as an Administrator except 1) they are only able to create, view, modify, or transfer participants for themselves and Case Managers in their own domain, 2) they are unable to create, view or edit the user profiles of any other RAD System user, and 3) they have access to all RAD report types - but may only select criteria for their Case Manager domain.

- **Case Manager**
  A Case Manager is a user who can create, view and modify participants. Case Managers will only be able to access their own participants. They cannot see other Case Managers' participants. Case Managers can access all RAD report types - but may only select criteria for their participant caseload.

- **Read-Only**
  Read-Only users have the ability to view all participants and reports; however these users are not able to modify any information.

Log in to RAD System

This section provides instructions for logging in to the RAD System by the following users:

- Log in to RAD by Authorized Grantee Representative
- Forgot Password for Authorized Grantee Representative
- Log in to RAD by Administrators, Area Case Managers, Case Managers, and Read-only Users
- Forgot Password for Administrators, Area Case Managers, Case Managers, and Read-only Users

Log in to RAD by Authorized Grantee Representatives

Authorized Grantee Representatives may use these steps to log in to the RAD System:

1. Open the **ETA Program Reporting** email to obtain the RAD System website, Grantee password and PIN. This email was generated when the DOL/National Office Program Officer created your grant account in the RAD System.

2. Click the link to the RAD System that is provided in the email (https://www.etareports.doleta.gov). The Grantee Reporting System login screen is displayed.

3. Type your password and click **Login**. The RAD System Home page is displayed.

Forgot Password for Authorized Grantee Representative Users

1. If you are a RAD Authorized Grantee Representative and have lost or forgotten your password, you can access the Grantee Reporting System login screen and click **Contact** at the bottom of the screen for the Applications Support Help Desk phone (202-693-2682) and email (appsupport.ebss@dol.gov).

2. When you contact the Applications Support Help Desk, they will send you an email with your password.

Log in to RAD by Administrators, Area Case Managers, Case Managers, and Read-Only Users

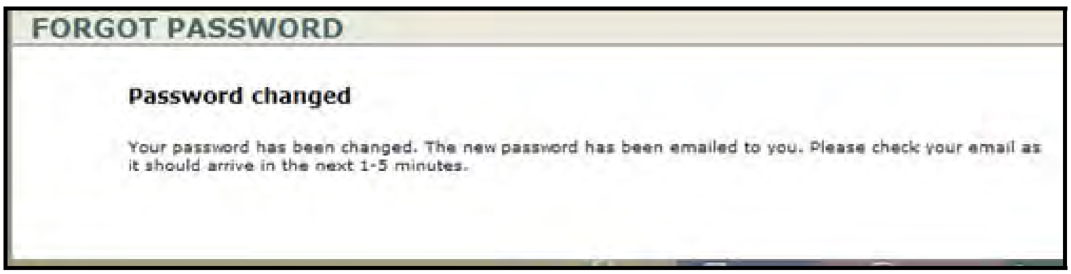
1. Open the email from **etareporting.auto-email@dol.gov** that was generated by the Authorized Grantee Representative (or Administrator) to obtain the RAD System website link, login ID and password: https://www.etareports.doleta.gov/cfdocs/grantee_prod/reporting/BRG_Green_RAD.
2. When the link to the RAD System is clicked, the RAD System login screen is displayed.
3. Type your login ID and password and click **Login**. The RAD System Home page is displayed.

Forgot Password for Administrator, Area Case Manager, Case Manager, and Read-Only User

1. If the RAD Administrator, Area Case Manager, Case Manager, or Read-Only user has lost or forgotten their password, they can access the RAD login screen and click **Forgot Password**. The Forgot your Password? screen is displayed with the following message: "To reset your password, please enter your login ID. A new password will be generated and sent to your email address."

   If the user does not have his login ID, an Administrator may obtain the login ID by viewing the User Management Overview page.

2. Enter your login ID and click **Reset Password**. The Password Changed screen is displayed with the following message: "Your password has been changed. The new password has been emailed to you. Please check your email as it should arrive in the next 1-5 minutes."

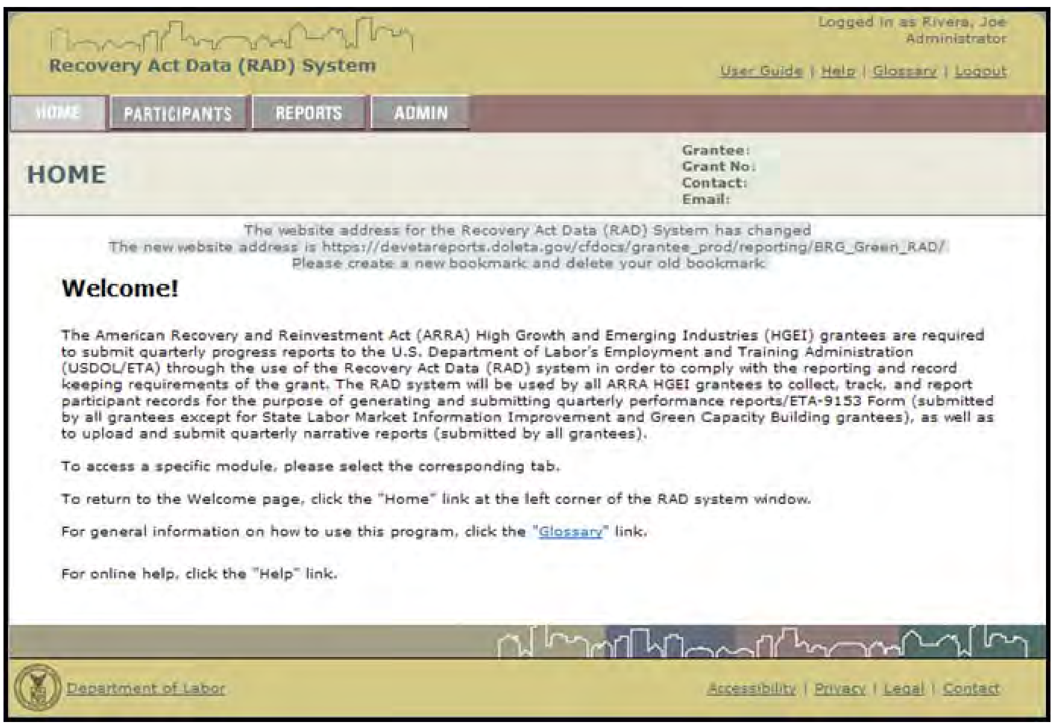


3. An email with your new password is sent to the email address in your user profile. **Note:** Administrators, Area Case Managers and Case Managers may access their Admin/user profile and enter a new password (change from the automated password that was originally sent to one they choose). Read-Only users may **not** change their automated password.

RAD System Home Page and Header

The RAD System Home page is the first page of the System that users will see once they are logged in to the System. The Home page contains a brief introduction to the System and the following features:

- Header Information
- Grantee Information
- Function Tabs



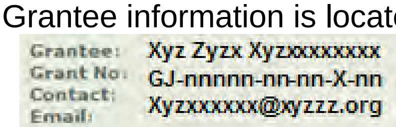
Header Information

The header, located at the top of the page, contains several key pieces of information:

- **User Identification** - The top right corner displays the user’s name and title.
- **User Guide -** Click the User Guide link to print a hard-copy document of the online help instructions.
- **Help Link** - Below the user's name, you can click the Help link to access this online help tool with a Table of Contents for RAD user instructions. The Help tool also includes Frequently Asked Questions (FAQs) that cover the most commonly asked questions from users.
- **Glossary Link**
  The Glossary link is next to the Help link. Click it to access the ARRA HGEI Performance Reporting Glossary and Guide. This guide provides assistance with terminology used throughout the RAD System, and outlines the performance reporting process step-by-step.
- **Logout Link**
  The Logout link is located next to the Glossary link. Click the Logout link from any RAD screen to log out of the System.

Grantee Information

Grantee information is located below the top right corner of the screen.



It consists of the grantee name, grant number, contact name, phone, and email address.

Check the user identification and grantee information frequently for accuracy. Any changes or discrepancies in this information should be reported to the grantee’s Federal Project Officer (FPO).

Function Tabs

Located directly below the header information are the four RAD System tabs. These tabs are also located on every page within the RAD System. The tabs direct users to all functions within the RAD System. The tabs include: Home, Participants, Reports, and Admin.

- **Home**
  Select the Home tab from any location in RAD to access the Home page

- **Participants**
  Select the Participants tab from any location in RAD to access the Participants Overview page. Here, users are able to create, view, and edit a participant's information.

- **Reports**
  Select the Reports tab from any location in RAD to access the Quarterly Progress Report and other RAD reports. Here, users will be able to run, view and print the reports.

- **Admin**
  Select the Admin(istration) tab from any location in RAD to access the User Management page. Here, users can perform several administrative functions, such as creating users, modifying users, and making a user inactive or active.

RAD System Features

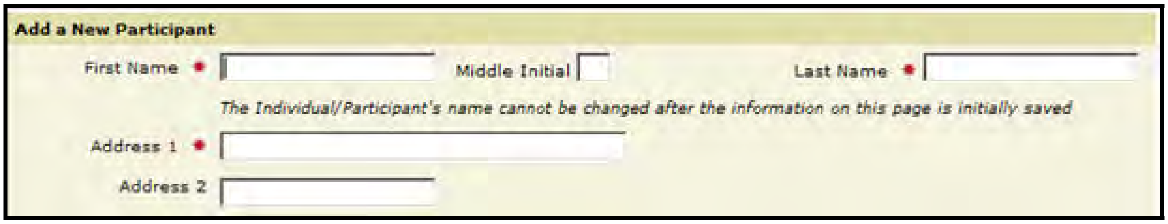
Informational Links - The RAD System footer, located at the bottom of every page, contains useful links:

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

Data Entry Screens
All entry screens provide the options to **Save**, **Reset**, and **Cancel**.

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

Required Fields are indicated by a red asterisk (*).



Administration

Administration (ADMIN) Introduction

Authorized Grantee Representatives may perform the following actions in this module:

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

Administrators have access to the same actions performed by the Authorized Grantee Representative except the following**:** Administrators cannot update their own status to active or inactive. Administrators can, however, change their own password in their user profile.

Area Case Managers and Case Managers may perform the following actions in this module:

- View/update their own user profile that includes their name, phone and email
- Update their password in the user profile

Read-Only users do not have access to this module.

View All Users in Overview List

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

1. Click **Admin** on the RAD System menu bar. The **User Management Overview** screen is displayed.

User Management Overview Add New User

User	Login ID	Role	Area Case Manager	Status
Basie, Count	CBasie	Area Case Manager		Active
Cremini, Genevieve	GCremini	Case Manager		Active
Fox, Jamie	JFox	Administrator		Active
Jones, Test	TName Change	Case Manager	Basie, Count ...More	Active
Jones, Rhonda	RJones	Case Manager	Basie, Count ...More	Active
Rice, Fried	FRice	Case Manager	Toast, Shrimp	Active
Rivera, Joe	JRivera	Administrator		Active
Toast, Shrimp	SToast	Area Case Manager		Active

2. All RAD users that have been added to the RAD System under the grant number are displayed with their name, login ID, role, assigned Area Case Manager (if applicable) and status. **Note:** Area Case Managers and Case Managers will only see a listing for themselves.

3. If a Case Manager is assigned to more than one Area Case Manager, you can click **...More** under the Area Case Manager column and the Case Manager's row is expanded to display all of the Area Case Managers that the Case Manager is assigned to (shown below). Click **Hide** to close the expanded view.

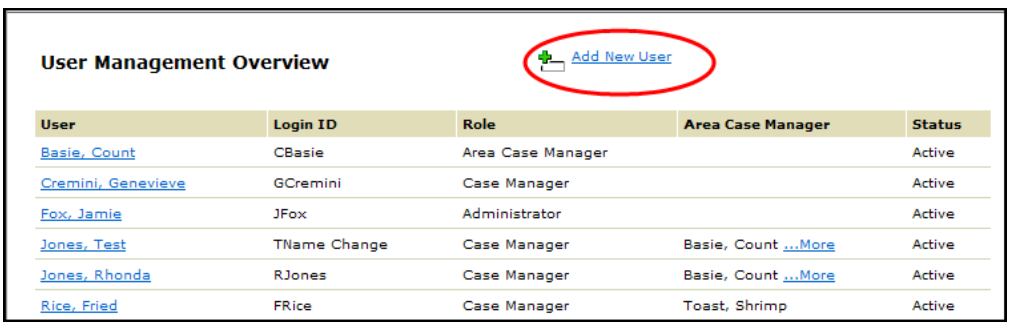
User	Login ID	Role	Area Case Manager	Status
Basie, Count	CBasie	Area Case Manager		Active
Cremini, Genevieve	GCremini	Read Only		Active
Jones, Test	TName Change	Case Manager	Basie, Count Toast, Shrimp Hide	Active

Add New User

The **Authorized Grantee Representative** and **Administrator** may use these steps to create a new user in the RAD System. The Add New User function also provides for assigning existing Case Manager(s) to a new Area Case Manager and, the reverse; assigning existing Area Case Manager(s) to a new Case Manager (a Case Manager may have more than one Area Case Manager assigned to him).

Area Case Managers and Case Managers do not have access to this function.

1. Click **Admin** on the RAD System menu bar. The **User Management Overview** screen is displayed.



User Management Overview

Add New User

User	Login ID	Role	Area Case Manager	Status
Basie, Count	CBasie	Area Case Manager		Active
Cremini, Genevieve	GCremini	Case Manager		Active
Fox, Jamie	JFox	Administrator		Active
Jones, Test	TName Change	Case Manager	Basie, Count ...More	Active
Jones, Rhonda	RJones	Case Manager	Basie, Count ...More	Active
Rice, Fried	FRice	Case Manager	Toast, Shrimp	Active

2. Click **Add New User**. The **Add New User** screen is displayed.

Add New User

First Name *

Middle Initial

Last Name *

Phone Number * Phone Ext

Email *

Roles * Administrator

Area Case Manager

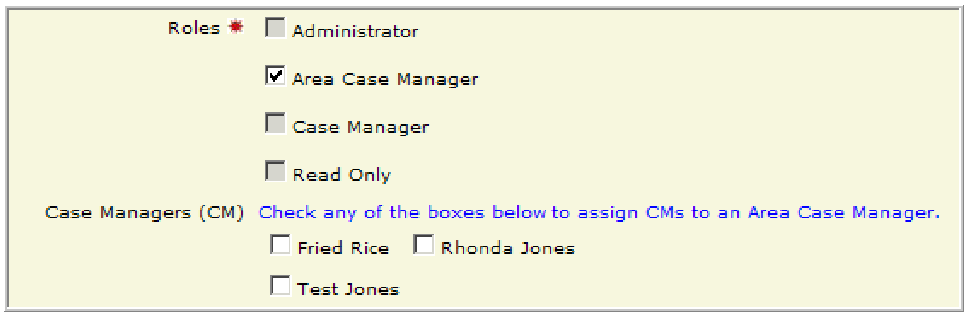
Case Manager

Read Only

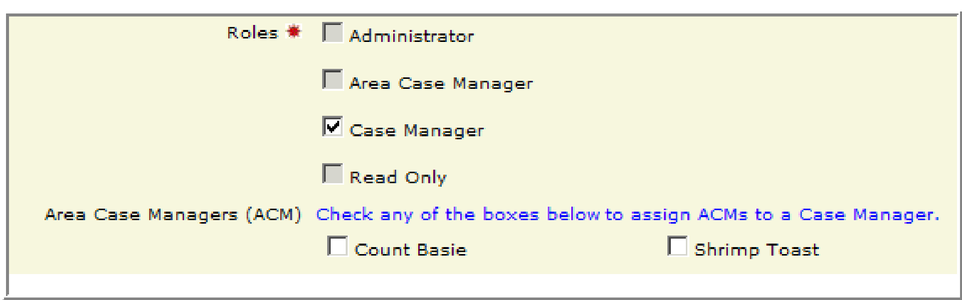
Save Reset Cancel

3. Fill in the new user's information. Select the user's role (Administrator, Area Case Manager, Case Manager or Read-Only). To change the role selection, click the checked box to clear it and, then, check the desired role.

- Area Case Manager Role - If you select Area Case Manager as the role, the System allows you to select existing Case Manager(s) to be assigned to the Area Case Manager user.



- Case Manager Role – If you select Case Manager as the role, the System allows you to select existing Area Case Manager(s) to be assigned to the Case Manager user.



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

Update User's Profile

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

Area Case Managers and Case Managers may only update their own profile (including their own password, but not their active status).

The Authorized Grantee Representative and Administrator may perform the following tasks for all users. They will not be able to update other user's passwords. The Authorized Grantee Representative can only have his own profile updated by the National Office Administrator:

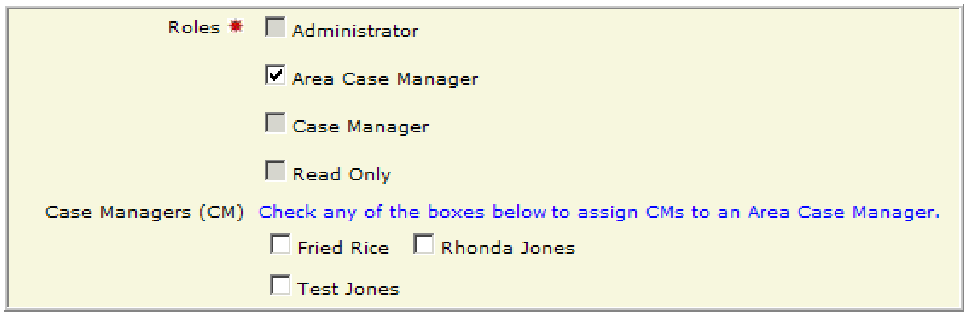
- Update the RAD System user's profile
- Update the Area Case Manager and Case Manager assignments
- Update the user's status to active or inactive

1. Click **Admin** on the RAD System menu bar. The User Management Overview screen is displayed.

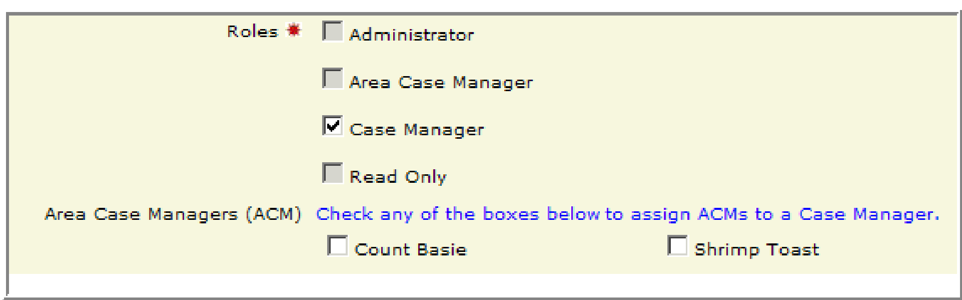
2. Click the user's name in the overview list. The Update User screen is displayed.

3. Update the desired fields. To change the role selection, click the checked box to clear it and, then, check the desired role. If the user's role is changed to a CM or ACM, the following actions are provided:

   - Area Case Manager Role - If you change the user's role to Area Case Manager, the System allows you to select existing Case Manager(s) to be assigned to the Area Case Manager user.



   - Case Manager Role – If you change the user's role to Case Manager, the System allows you to select existing Area Case Manager(s) to be assigned to the Case Manager user.



4. **Change Password:** A user may change his own password after his profile is created. The exceptions are for the Authorized Grantee Representative's password (it may only be changed by the National Office) and the Read-Only user's password (it may only be recreated when the Read-Only user clicks **Forgot Password** on the RAD login screen).

5. **Change Active Status -** An Authorized Grantee Representative or Administrator may update a user's **status** in the user's profile. Uncheck the box next to "Is user active?" to **de-activate** the user. When a user's profile is created, the RAD System automatically assigns the user's status as active (default value). An Administrator may not update his own status from active or inactive - only the Authorized Grantee Representative is able to update an Administrator's status.

6. Click **Save** to enter the updates.

Participants

Participant Introduction

This module allows RAD System users to perform the following actions. (Read-only users will have limited functionality. Area Case Managers and Case Managers will only have access to participants assigned to them.)

Note: This section only applies to the following SGAs:

- SGA/DFA PY-08-18 (Energy Training Partnership Grantees)
- SGA/DFA PY-08-20 (State Energy Sector Partnership and Training Grantees)
- SGA/DFA PY-08-19 (Pathways Out of Poverty Grantees)
- SGA/DFA PY-09-01 (Health Care Sector and Other High Growth and Emerging Industries Grantees)

In this section, you will learn to:

- View Participants in an Overview List (Area Case Managers and Case Managers will see only their domain or participants respectively)
- View Participant Summary
- Add New Participant
- Update Participant
- Delete Participant
- Reactivate Participant
- Add/Update Program Information
- Add/Update Education or Job Training Activities
- Delete Education or Job Training Activities

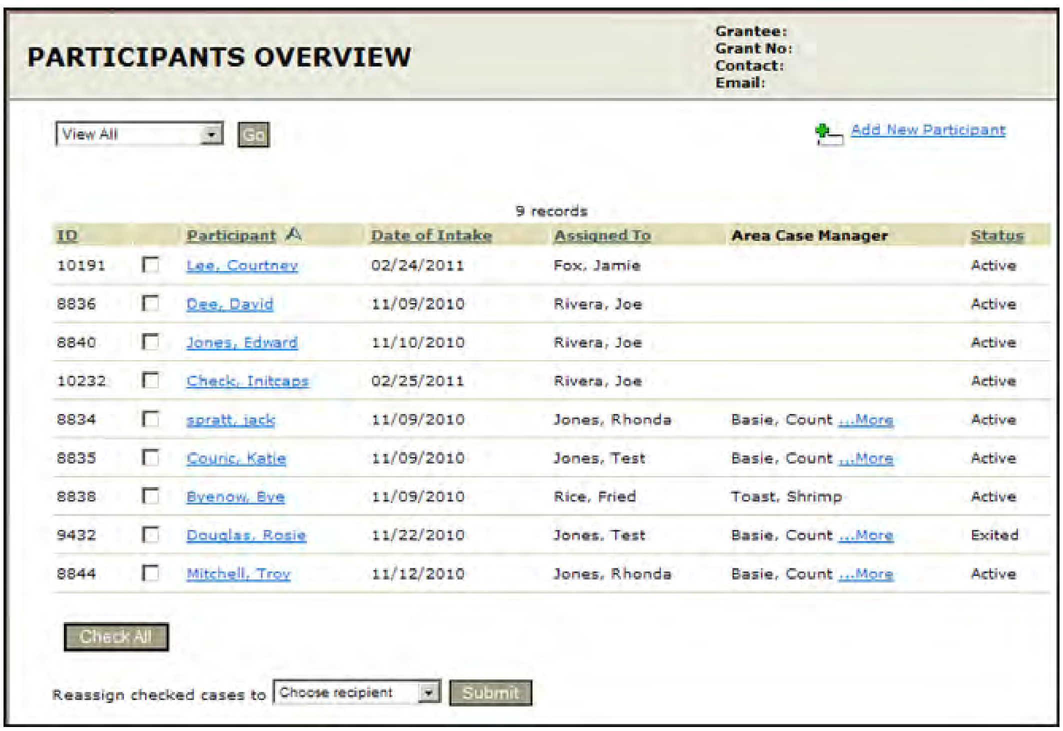
- Add/Update Other Grant-Funded Services
- Delete Other Grant-Funded Services
- Add/Update Employment and Follow-up Information
- Add/Update Gap in Service)
- Reassign Participants (Authorized Grantee Representatives, Administrators, and Area Case Managers)

View Participants in Overview List

Use these steps to view a list of participants with overview data. Authorized Grantee Representatives, Administrators, and Read-only users will be able to view all participants for the grant. Area Case Managers will only be able to view the Case Managers/participants in their domain, and Case Managers will only be able to view their participants.

1. Click **Participants** on the RAD System menu bar. The Participants Overview screen is displayed.

2. All grant participants for the Authorized Grantee Representative, Administrator, Area Case Manager, or Case Manager that have been added to the RAD System are displayed along with their summary information.


PARTICIPANTS OVERVIEW

Grantee:
Grant No:
Contact:
Email:

View All | Go | Add New Participant

9 records

ID		Participant	Date of Intake	Assigned To	Area Case Manager	Status
10191	☐	Lee, Courtney	02/24/2011	Fox, Jamie		Active
8836	☐	Dee, David	11/09/2010	Rivera, Joe		Active
8840	☐	Jones, Edward	11/10/2010	Rivera, Joe		Active
10232	☐	Check, Initcaps	02/25/2011	Rivera, Joe		Active
8834	☐	spratt, jack	11/09/2010	Jones, Rhonda	Basie, Count ...More	Active
8835	☐	Couric, Katie	11/09/2010	Jones, Test	Basie, Count ...More	Active
8838	☐	Byenow, Bye	11/09/2010	Rice, Fried	Toast, Shrimp	Active
9432	☐	Douglas, Rosie	11/22/2010	Jones, Test	Basie, Count ...More	Exited
8844	☐	Mitchell, Troy	11/12/2010	Jones, Rhonda	Basie, Count ...More	Active

Check All

Reassign checked cases to | Choose recipient | Submit

3. If a participant's Case Manager is assigned to more than one Area Case Manager, you can click **...More** under the Area Case Manager column and the participant's row is expanded to display all of the Area Case Managers

that the Case Manager is assigned to (shown below). Click **Hide** to close the expanded view.

ID		Participant	Date of Intake	Assigned To	Area Case Manager	Status
8836	☐	Dee, David	11/09/2010	Rivera, Joe		Active
8840	☐	Jones, Edward	11/10/2010	Rivera, Joe		Active
8834	☐	spratt, jack	11/09/2010	Rivera, Joe		Active
8835	☐	Couric, Katie	11/09/2010	Rivera, Joe		Active
8838	☐	Byenow, Bye	11/09/2010	Jones, Rhonda	Basie, Count Toast, Shrimp Hide	Exited

Participant Summary

Use these steps to access the Participant Summary screen.

1. Click **Participants** on the RAD System menu bar. The Participants Overview screen is displayed.

2. Click the name of the participant to be displayed. The Summary screen for the participant is displayed.

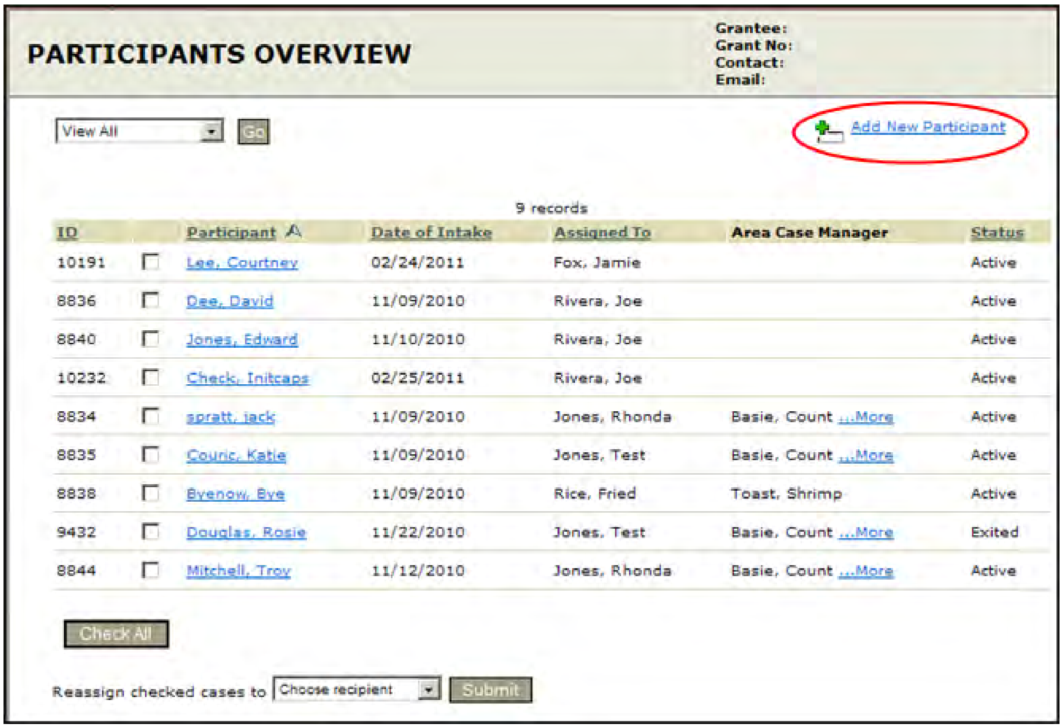
3. From the Participant Summary screen, you can choose to perform the following tasks for the participant:

   a. Update Participant Information **-** Click the **Edit** link next to the participant's name.
   b. Delete Participant - Click the **Delete this Participant** link.
   c. Reactivate Participant - Click the **Reactivate this Participant** link (only displayed if participant has **"exited"** status).
   d. Add/Update Program Information **-** Click the **Program** tab or the **Edit Program Information** link.
   e. Add an Education or Job Training Activity - Click the **Add New Activity** link.

f. Update an Education or Job Training Activity **-** Click the **Education or Job Training** tab or click the **Education or Job training** link (under Category in the lower left section of the screen).
g. Add an Other Grant-Funded Service - Click the **Add Other Grant-Funded Service** link.
h. Update an Other Grant-Funded Service **-** Click the **Other Grant-Funded Services** tab or **Other Grant-Funded Services** link (under Category in the lower left section of the screen).
i. Add Employment and Follow-up Information **-** Click the **Employment and Follow-Up** tab. Employment and Follow-Up information may be added even after the participant exits the System.
j. Add/Update Exit Information **-** Click the **Exit** tab to enter a gap-in-service (delay exit).
k. Add Notes on Participant **-** Click the **Add Note** link. Notes on the participant may be added even after the participant exits the System.
l. Update Notes on Participant **-** Click the **Notes** tab.

Add New Participant

1. Click **Participants** on the RAD System menu bar. The Participants Overview screen is displayed.


PARTICIPANTS OVERVIEW

Grantee:
Grant No:
Contact:
Email:

View All | Go | Add New Participant

9 records

ID		Participant	Date of Intake	Assigned To	Area Case Manager	Status
10191	☐	Lee, Courtney	02/24/2011	Fox, Jamie		Active
8836	☐	Dee, David	11/09/2010	Rivera, Joe		Active
8840	☐	Jones, Edward	11/10/2010	Rivera, Joe		Active
10232	☐	Check, Initcaps	02/25/2011	Rivera, Joe		Active
8834	☐	spratt, jack	11/09/2010	Jones, Rhonda	Basie, Count ...More	Active
8835	☐	Couric, Katie	11/09/2010	Jones, Test	Basie, Count ...More	Active
8838	☐	Byenow, Bye	11/09/2010	Rice, Fried	Toast, Shrimp	Active
9432	☐	Douglas, Rosie	11/22/2010	Jones, Test	Basie, Count ...More	Exited
8844	☐	Mitchell, Troy	11/12/2010	Jones, Rhonda	Basie, Count ...More	Active

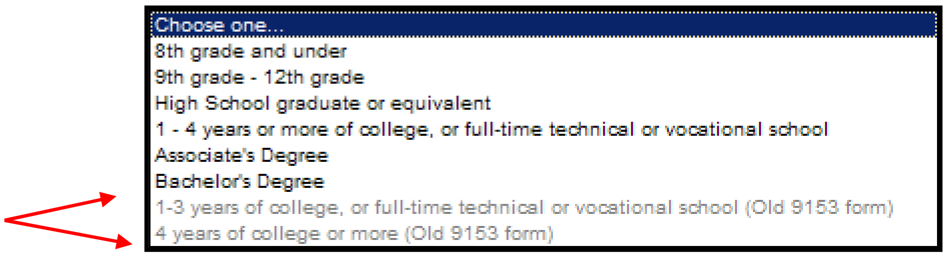
Check All

Reassign checked cases to Choose recipient Submit

2. Click the **Add New Participant** link. The Add New Participant screen is displayed below.

3. Fill in the participant's information. The red asterisk (*) indicates a **required** field. If a specific format is required for a field, it is displayed next to or below the field.
   Note: For details or definitions of a specific field (or data element), click the **Glossary** link at the top right corner of the RAD System window. The **Performance Reporting Glossary and Guide** for ARRA High Growth and Emerging Industries (HGEI) will be displayed.

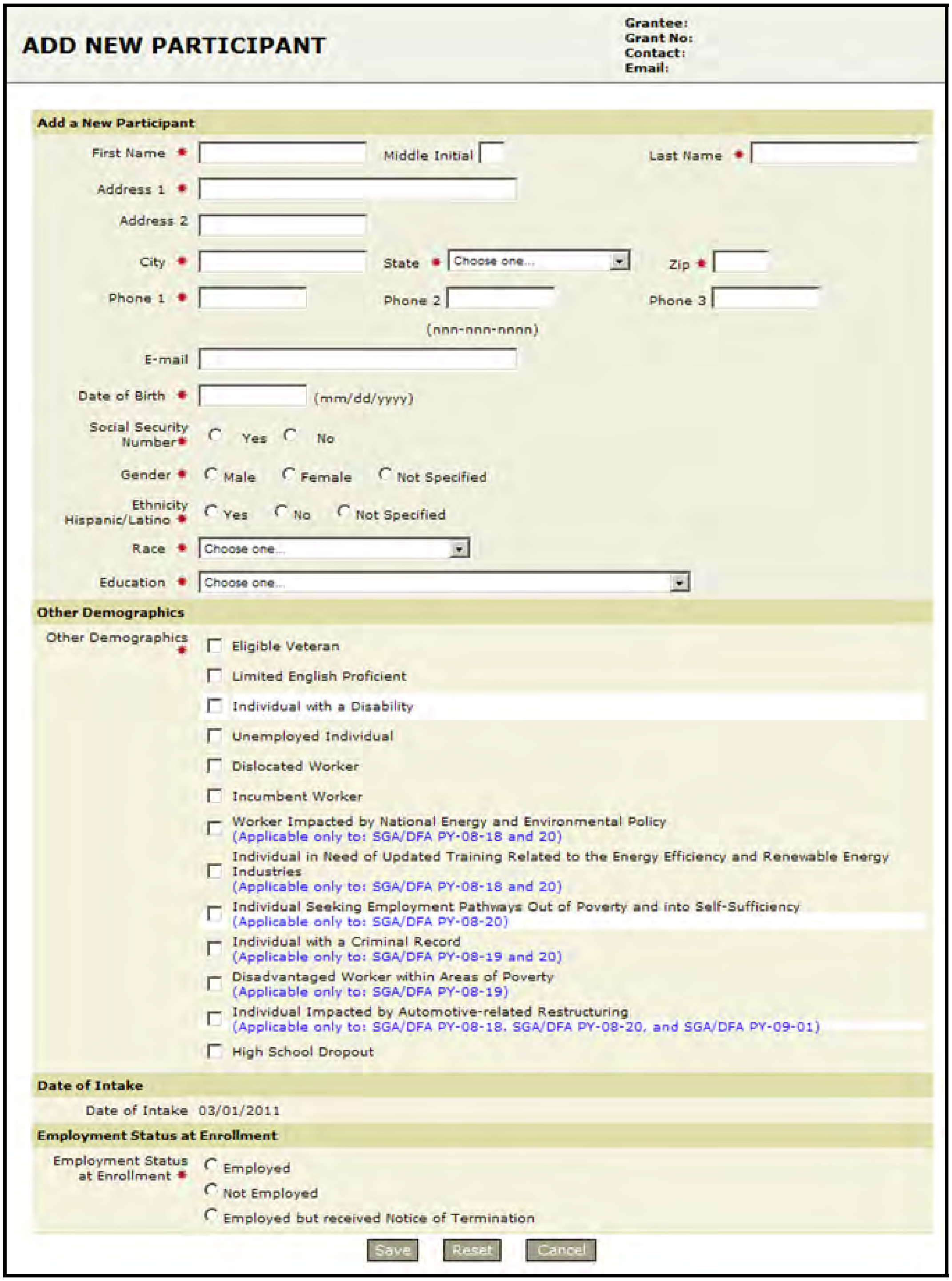
4. The Education field provides two options from an older version of the ETA-9153 Form (**1-3 years of college or full-time technical or vocational school** and **4 years of college or more**). They are **inactive** and cannot be selected for the Add Participant function (see figure below). These options are displayed so users may view their choices on previously entered participant records.



5. If you select **Yes** in the **Social Security Number** field, an additional field is displayed for entering the participant's social security number. Confirm that the social security number is correct. You will **not** be able to change it after the initial participant information form is saved.

6. **Note:** The Date of Intake is automatically populated by the RAD System. It cannot be updated.

7. Click **Save** to enter the new participant.



ADD NEW PARTICIPANT

Grantee:
Grant No:
Contact:
Email:

Add a New Participant

First Name * | Middle Initial | Last Name *

Address 1 *

Address 2

City * | State * Choose one... | Zip *

Phone 1 * | Phone 2 | Phone 3

(nnn-nnn-nnnn)

E-mail

Date of Birth * (mm/dd/yyyy)

Social Security Number* — Yes / No

Gender * — Male / Female / Not Specified

Ethnicity Hispanic/Latino * — Yes / No / Not Specified

Race * Choose one...

Education * Choose one...

Other Demographics

Other Demographics *

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

Date of Intake

Date of Intake 03/01/2011

Employment Status at Enrollment

Employment Status at Enrollment *

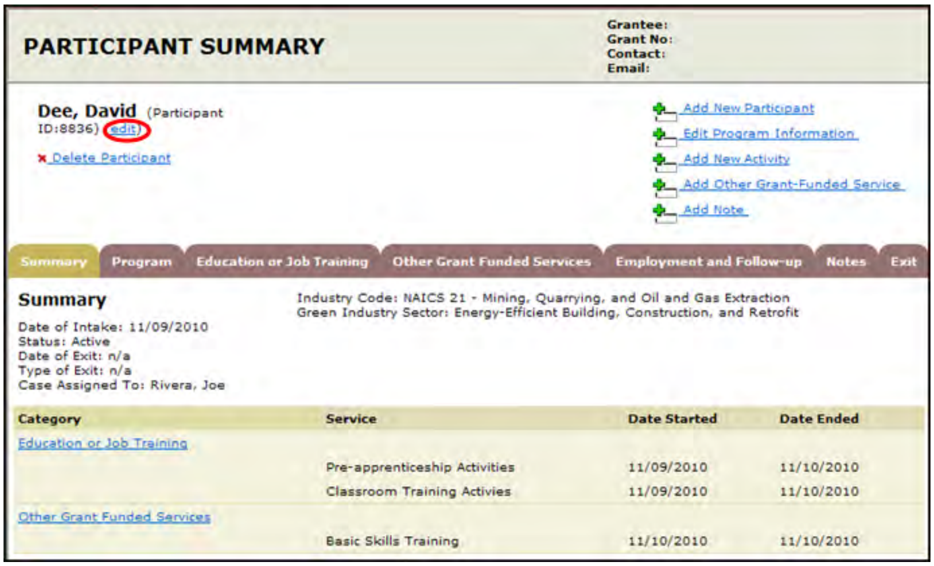
- Employed
- Not Employed
- Employed but received Notice of Termination

Save | Reset | Cancel

Update Participant Record

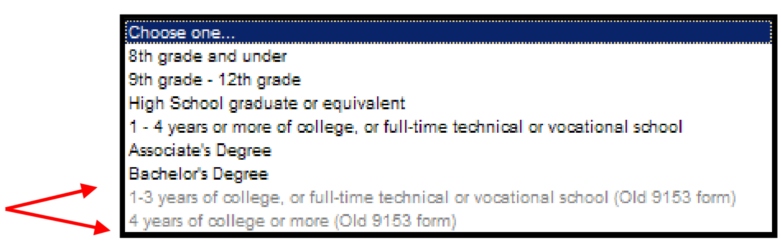
1. Click **Participants** on the RAD System menu bar. The Participants Overview screen is displayed.

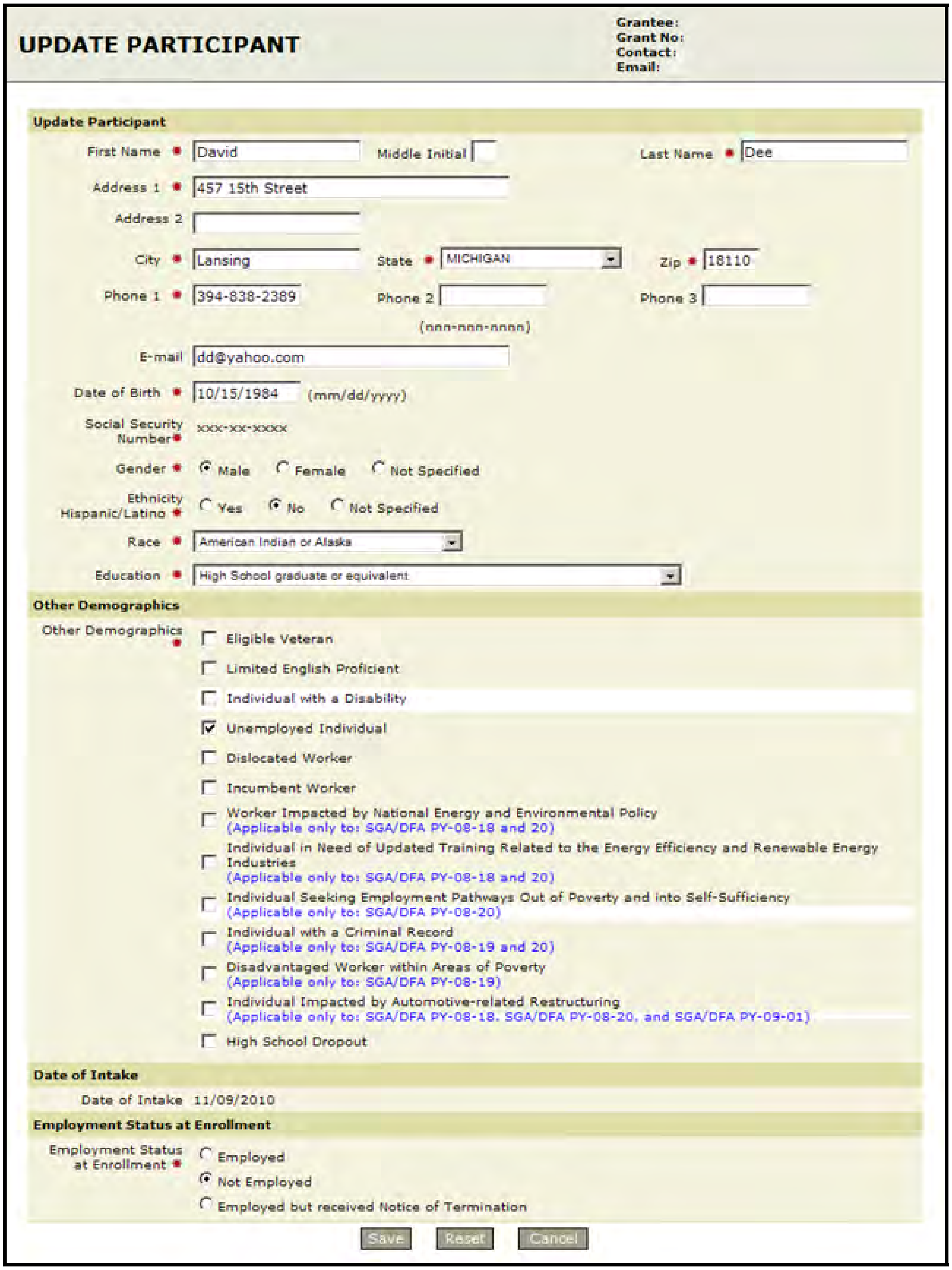
2. Click the name of the participant you want to update. The Summary screen for the participant is displayed.



3. Click **edit** next to the participant's name (top left). The Update Participant screen is displayed (see figure on next page).

4. Enter your updates and click **Save**. **Note:** Participant's Social Security Number and Date of Intake cannot be updated. The Education field provides two options from an older version of the ETA-9153 Form (**1-3 years of college or full-time technical or vocational school** and **4 years of college or more**). They are **inactive** and cannot be selected for the Update Participant function (see below). These options are displayed so users may view their choices on previously entered participant records.





UPDATE PARTICIPANT

Grantee:
Grant No:
Contact:
Email:

Update Participant

First Name * David | Middle Initial | Last Name * Dee

Address 1 * 457 15th Street

Address 2

City * Lansing | State * MICHIGAN | Zip * 18110

Phone 1 * 394-838-2389 | Phone 2 | Phone 3

(nnn-nnn-nnnn)

E-mail dd@yahoo.com

Date of Birth * 10/15/1984 (mm/dd/yyyy)

Social Security Number* xxx-xx-xxxx

Gender * (•) Male ( ) Female ( ) Not Specified

Ethnicity Hispanic/Latino * ( ) Yes (•) No ( ) Not Specified

Race * American Indian or Alaska

Education * High School graduate or equivalent

Other Demographics

Other Demographics *

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

Date of Intake

Date of Intake 11/09/2010

Employment Status at Enrollment

Employment Status at Enrollment *
( ) Employed
(•) Not Employed
( ) Employed but received Notice of Termination

Save | Reset | Cancel

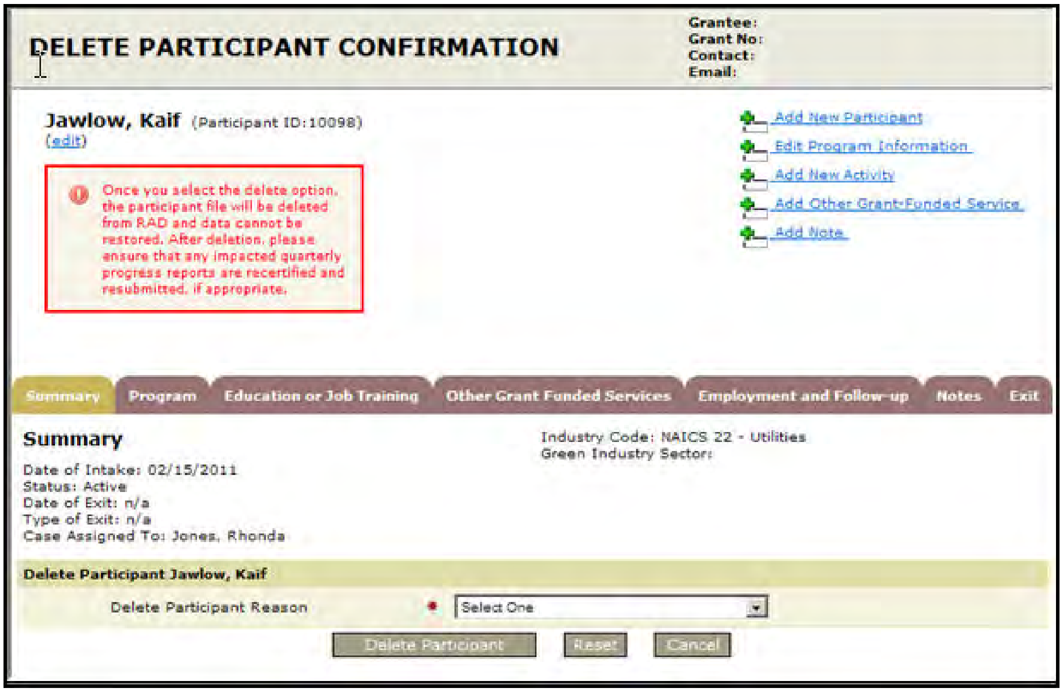
Delete Participant

This function allows the Authorized Grantee Representative and Administrators to delete a participant with an **active** status from the RAD System. Deleting a participant will also delete all related participant information (e.g., activities, services, employment/follow-up, notes and program information). **Note**: Once you complete the delete option, the entire participant file will be deleted from the RAD System and data **cannot be restored**. Please ensure that any impacted Quarterly Progress Reports are recertified and resubmitted, if appropriate.

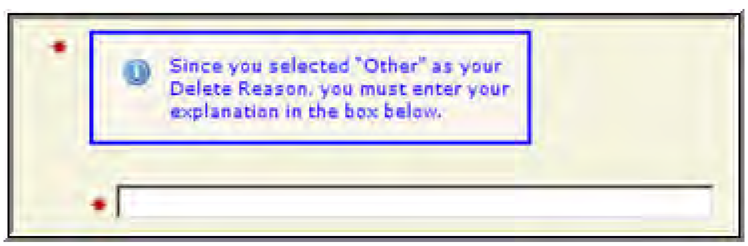
1. Click **Participants** on the RAD System menu bar. The Participants Overview screen is displayed.

2. Click the name of the participant you want to delete. The Summary screen for the participant is displayed.

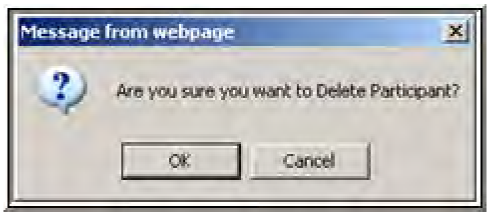
3. Click the **Delete this Participant** link (just below the participant's name). The Delete Participant Confirmation screen is displayed. **Note:** Once you select the delete option, the entire participant file will be deleted from the RAD System and data cannot be restored. Please ensure that any impacted Quarterly Progress Reports are recertified and resubmitted, if appropriate.



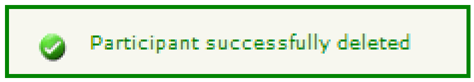
4. Select the reason for deletion in the Delete this Participant section. The following reasons are available on the drop-down list: a) Incorrect Social Security Number Reported, b) Individual is not an Eligible Participant, and c) Other – please specify. If you select Other, you must enter an explanation in the provided field.



5. Click **Delete Participant** to continue with the deletion process. (To change the deletion reason, click Reset. To exit the deletion process, click Cancel.) The confirmation to delete prompt is displayed.



6. To complete the deletion process, click **OK**. The entire participant record is deleted. The successful deletion confirmation is displayed.



7. The following email is sent to the Grantee for the deleted participant.

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

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

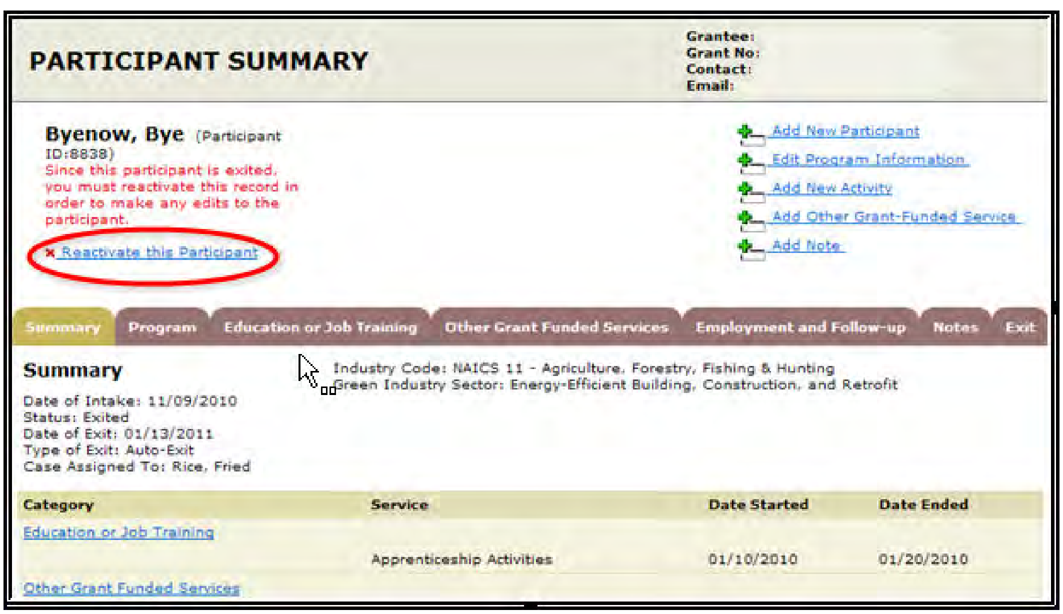
Reactivate Participant

This function allows the Authorized Grantee Representative and Administrators to reactivate a participant with an **exited** status in the RAD System. Reactivating a participant will also reactivate all related participant information (e.g., activities, services, employment/follow-up, notes and program information). **Note:** Once you complete the reactivate option, the participant's status is changed to active. Grantee staff should update the reactivated participant's file the same day of the reactivation to avoid a re-exit of the participant through the RAD System auto-exit process.

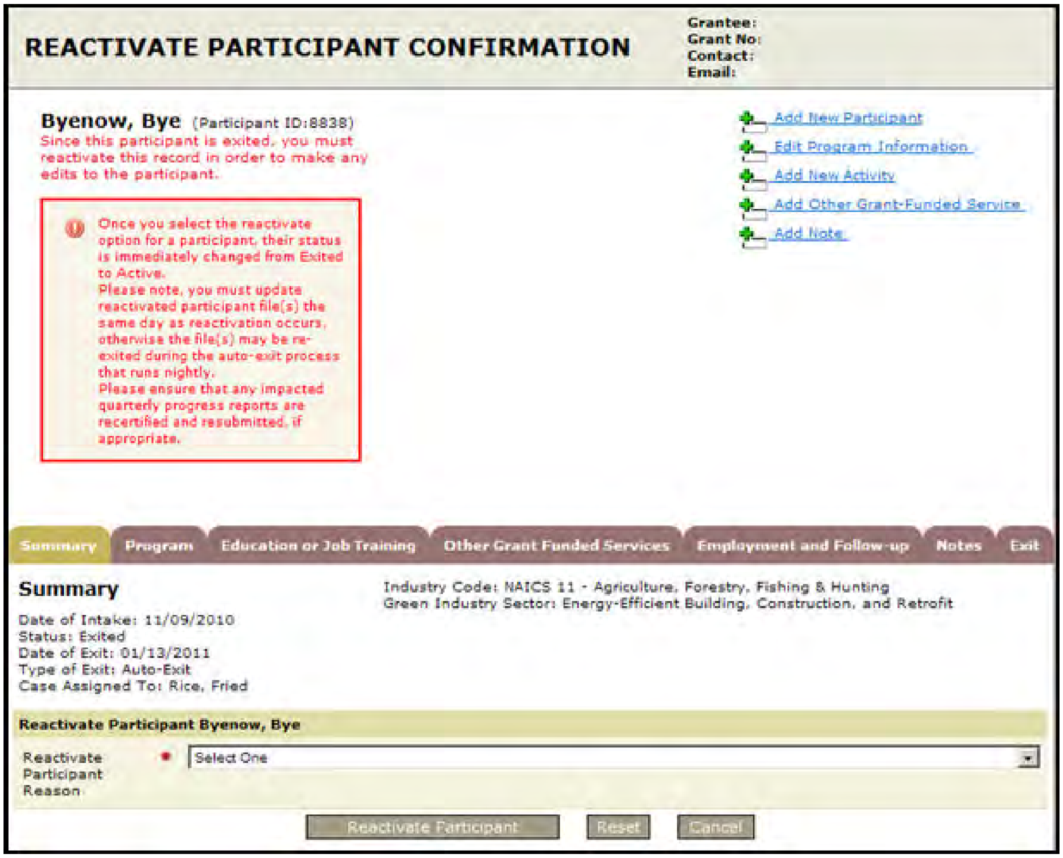
Please ensure that any impacted Quarterly Progress Reports are recertified and resubmitted, if appropriate.

1. Click **Participants** on the RAD System menu bar. The Participants Overview screen is displayed.

2. Click the name of the participant you want to reactivate. The Summary screen for the participant is displayed.

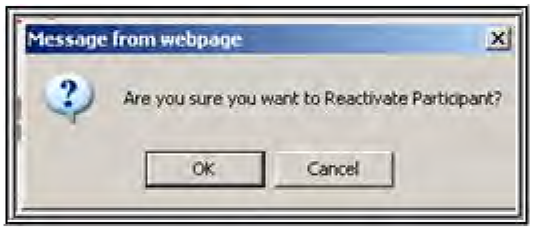


3. Click the **Reactivate this Participant** link (below the participant's name). The Reactivate Participant Confirmation screen is displayed. **Note**: Once you select the Reactivate option, the participant's file should be updated the same day (e.g., add an activity, service, or Gap-in-Service) to avoid a re-exit of the participant in the RAD System. Please ensure that any impacted Quarterly Progress Reports are recertified and resubmitted, if appropriate.

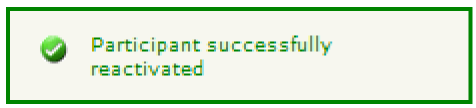


4. Select the Reactivate Participant Reason. The following reasons are available on the drop-down list: **1**) Participant was auto-exited, but needs to be reactivated for activity/service updates due to participant file not updated timely, and **2**) Participant was auto-exited, but needs to be reactivated due to eligible Gap-in- Service.

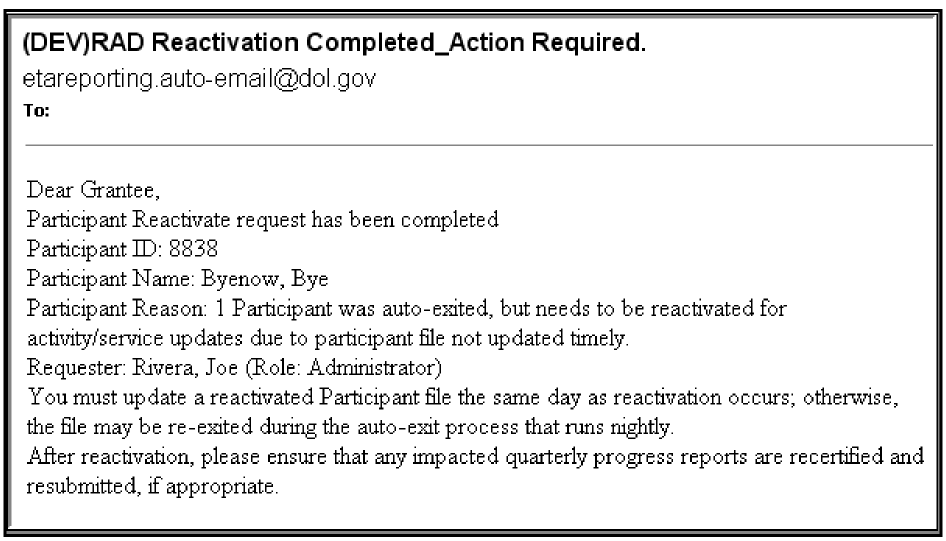
5. Click **Reactivate Participant** to continue with the reactivation process. (To change the reactivation reason, click Reset. To exit the reactivation process, click Cancel.) The confirmation to reactivate prompt is displayed.



6. To complete the reactivation process, click **OK**. The entire participant record is reactivated. The successful reactivation confirmation is displayed.



7. The following email is sent to the Grantee for the reactivated participant.



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

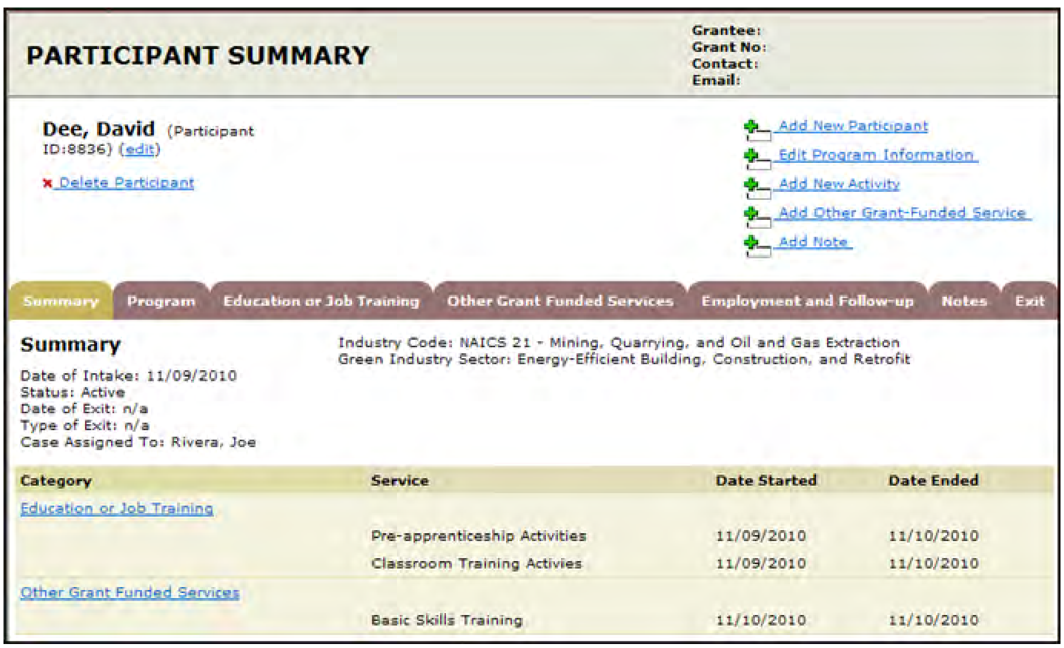
Dear Grantee,
Participant Reactivate request has been completed
Participant ID: 8838
Participant Name: Byenow, Bye
Participant Reason: 1 Participant was auto-exited, but needs to be reactivated for activity/service updates due to participant file not updated timely.
Requester: Rivera, Joe (Role: Administrator)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

Add Program Information

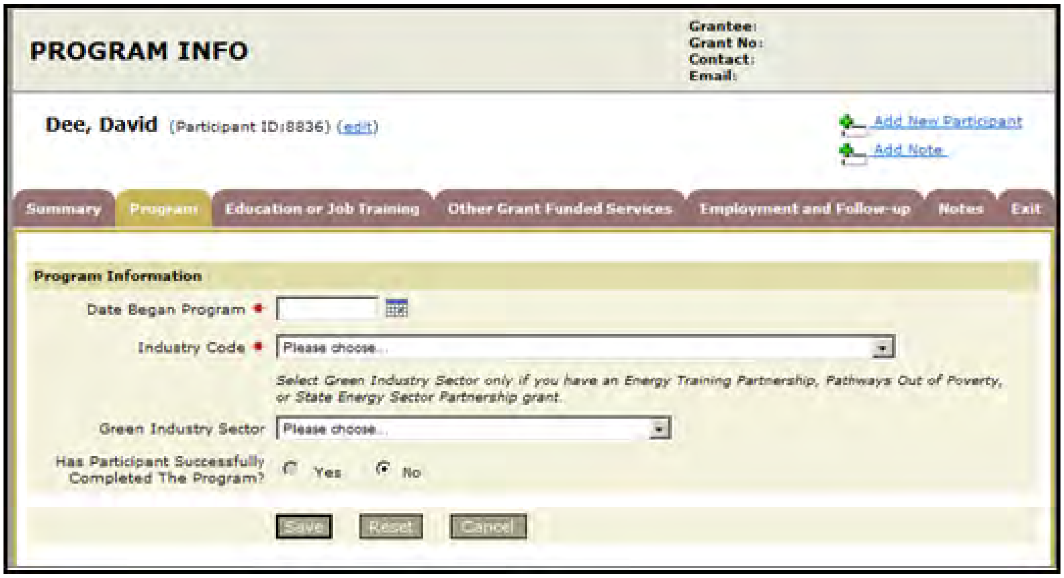
Note: Users must enter the participant's program information **before** any Education or Job Training activities can be added to the participant file.

1. Click **Participants** on the RAD System menu bar. The Participants Overview screen is displayed.

2. Click the name of the participant to have program information added to his record. The participant's Summary screen is displayed.



3. Click the **Program** tab. The Program Information screen is displayed.



4. Fill in the Program Information. Grantees awarded under the Energy Training Partnership, State Energy Sector Partnership and Training, and Pathways out of Poverty SGAs are required to select an option in the Green Industry Sector field. Health Care and Other Emerging Industries grantees should not select an option in the Green Industry Sector field.

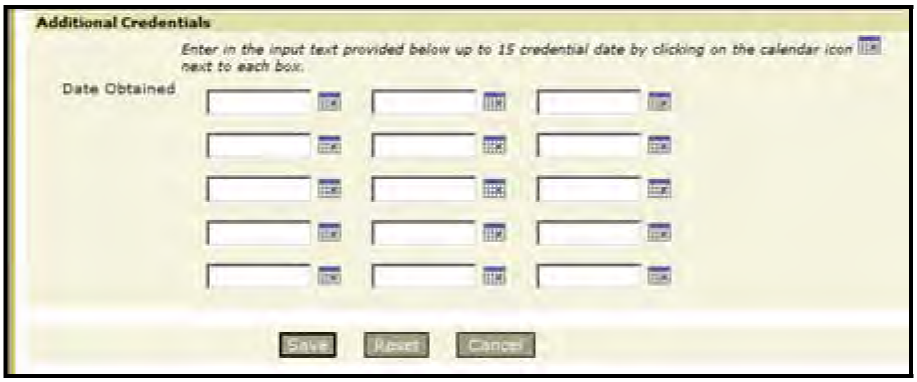
5. You are not able to select **Yes** to the question: Has Participant Successfully Completed the Program? until all of the participant's Education or Job Training activities are completed (this is indicated by entering a date in the "Date Ended" field).

6. Click **Save** to save the participant's Program Information record.

7. Once a participant has completed the Education and Job Training program, you may select **Yes** in the Has Participant Successfully Completed the Program? field. Additional fields will then be displayed as shown below.

8. Enter the Date of Completion (date program was successfully completed). Fill in credential information, if appropriate.

9. If you choose Yes in the Attained Additional Credentials? field, the following additional fields will be displayed.



10. Fill in the date(s) that any additional credentials were obtained (up to 15 additional credentials).

11. Click **Save** to enter the participant's Program Information record.

Update Program Information

1. Click **Participants** on the RAD System menu bar. The Participants Overview screen is displayed.

2. Click the name of the participant to have program information updated. The **Summary** screen for the participant is displayed.

3. Click the **Edit Program Information** link or click the **Program** tab. The current Program Information screen for the participant is displayed.

4. Fill in your updates to the program information. If the field "**...**Successfully Completed Program?" was previously **saved** with a "Yes," then the field cannot be changed to "No." **Note:** Refer to the Add Program Information section for details on entering program information fields. If you selected "Yes" by mistake, and need to change it back to "No," please contact the Applications Support Help Desk at appsupport.ebss@dol.gov.

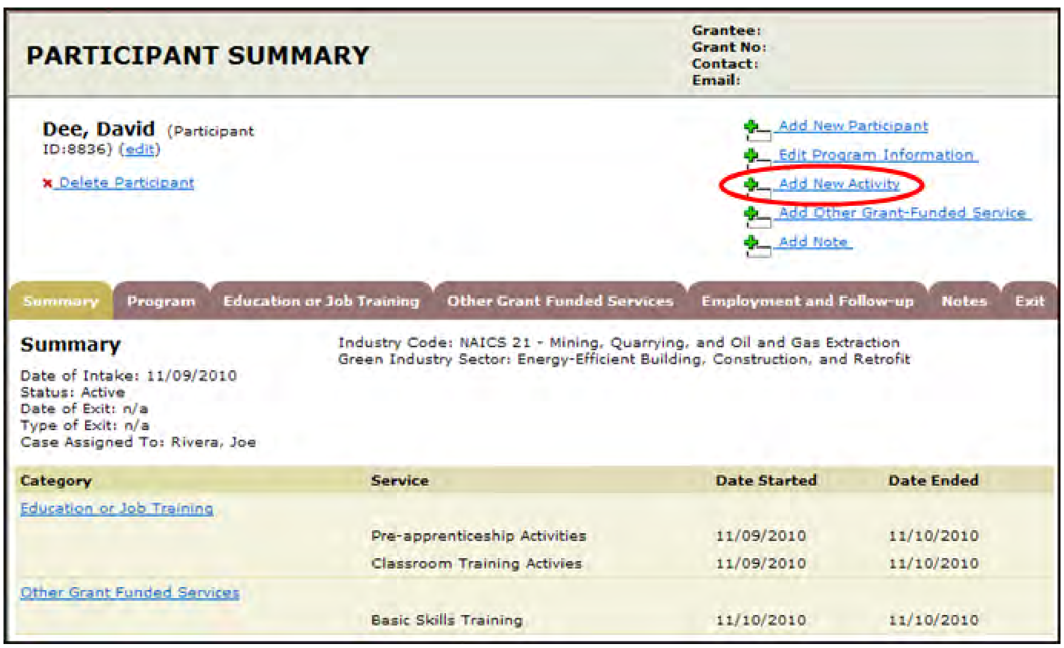
5. Click **Save** to enter the program information updates.

Add Education or Job Training Activity

Note: Users must enter the participant's Program Information **before** any Education or Job Training activities can be added to the participant file.

1. Click **Participants** on the RAD System menu bar. The Participants Overview screen is displayed.

2. Click the name of the participant to receive an activity. The Summary screen for the participant is displayed.



3. Click the **Add New Activity** link (upper right section). The Add Activity screen is displayed.

4. Fill in the Date Began activity and select the activity type.
5. Click **Save**. The activity will display on the participant's Summary screen.
6. Once the participant has completed the activity, update the activity by entering the Date Ended field.

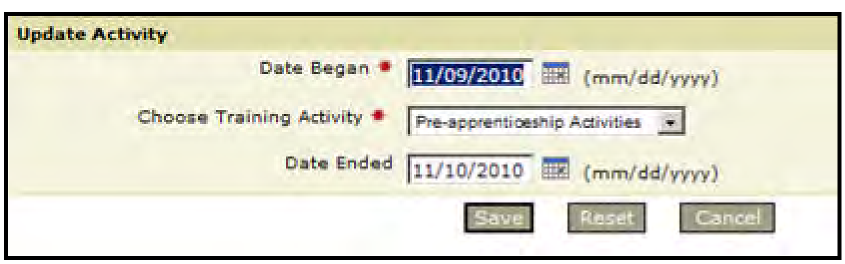
Update Education or Job Training

1. Click **Participants** on the RAD System menu bar. The Participants Overview screen is displayed.

2. To update a participant's Education or Job Training activity, click the name of the participant you wish to update. The Summary screen for the participant is displayed.

3. Click the **Education or Job Training** tab or the **Education or Job Training** link under the Category section on the Participant Summary page. The Education or Job Training summary screen is displayed.

4. Click the activity to be updated. The selected Education or Job Training activity screen is displayed.



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

Delete Education or Job Training Activity

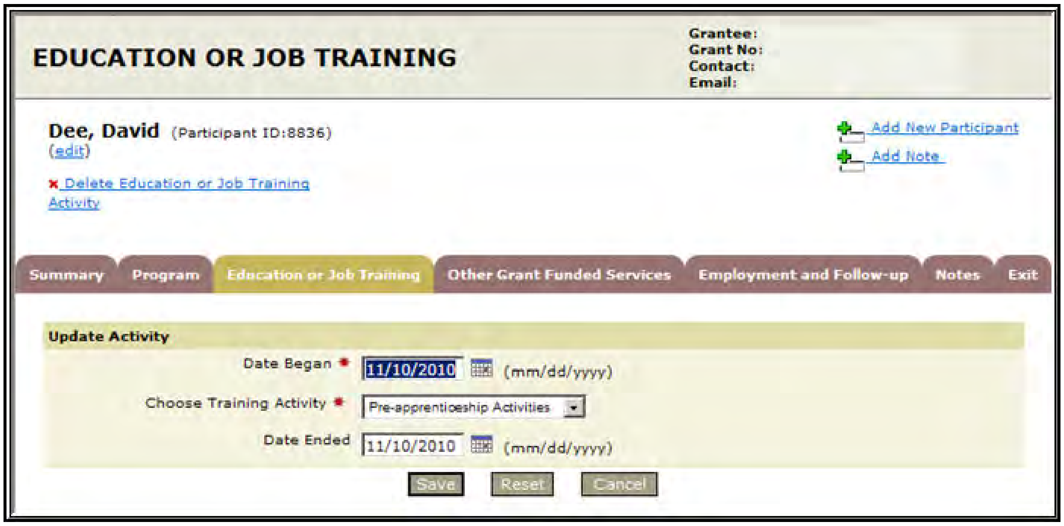
This function allows the users (except Read-Only users) to delete an education or job training activity for an active participant. **Note:** Please ensure that any impacted Quarterly Progress Reports are recertified and resubmitted, if appropriate.

1. Click **Participants** on the RAD System menu bar. The Participants Overview screen is displayed.

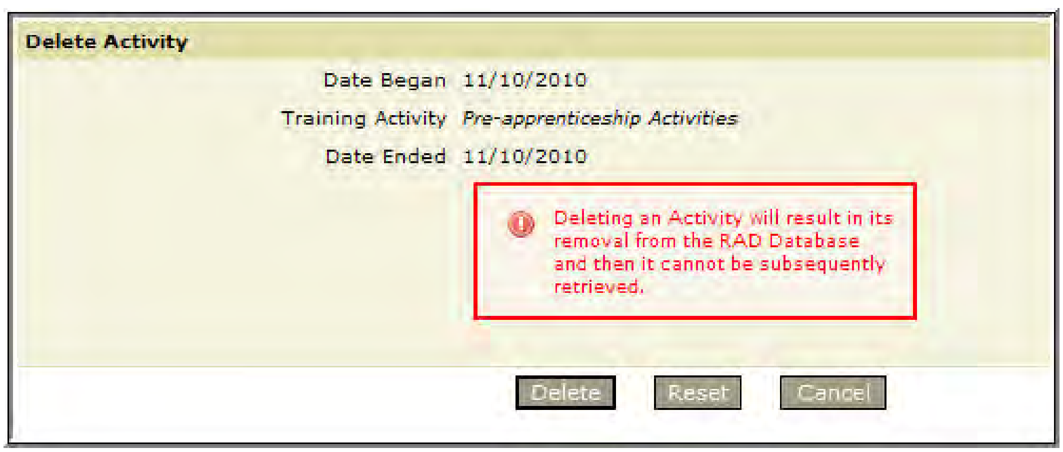
2. Click the name of the participant to have an activity deleted. The Summary screen for the participant is displayed.

3. Click the **Education or Job Training** tab or the **Education or Job Training** link under the Category section on the Participant Summary page. The Education or Job Training screen is displayed.

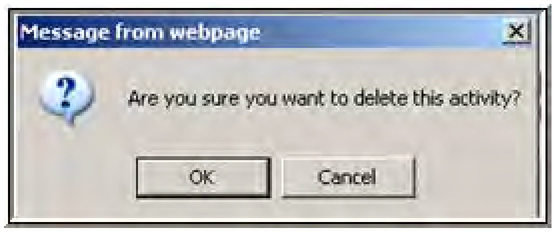
4. Click the link for the training activity to be deleted. The Update Activity screen is displayed for the selected training activity.



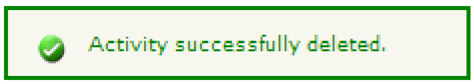
5. Click the **Delete Education or Job Training Activity** link (just below the participant's name). **Note**: Once you select the delete activity option, the participant's training activity will be deleted from the RAD System and data cannot be restored. The Delete Activity screen is displayed.



6. Click **Delete** to continue with the activity deletion process. (To exit the activity deletion process, click Cancel.) The confirmation to delete activity prompt is displayed.



7. To complete the activity deletion process, click OK. The participant's training activity record is deleted. The successful activity deletion confirmation message is displayed.

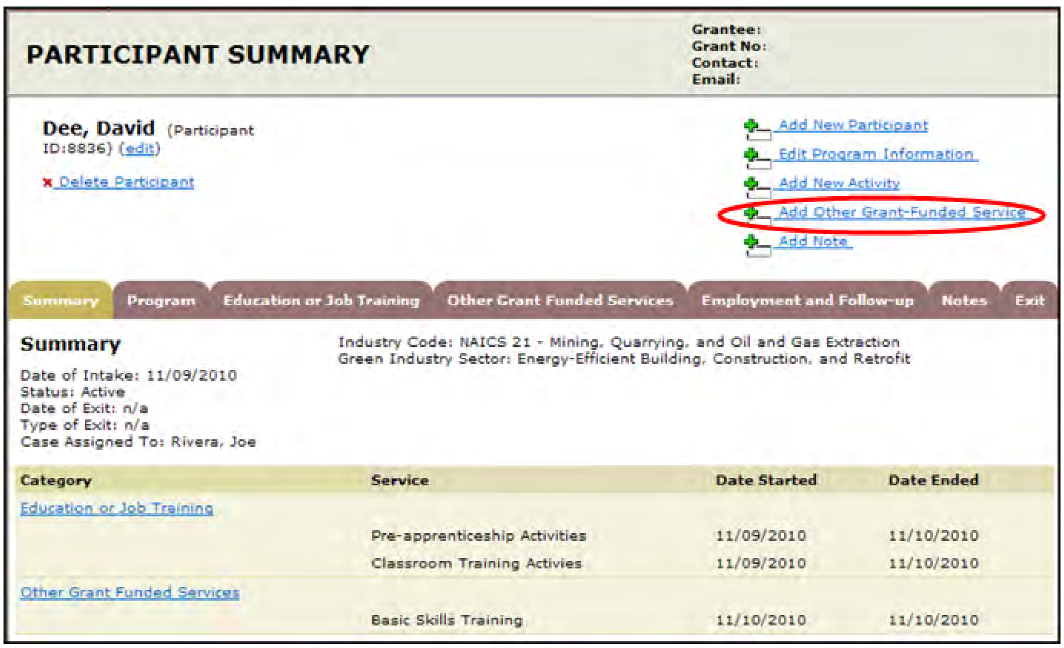


8. Please ensure that any impacted Quarterly Progress Reports are recertified and resubmitted, if appropriate.

Add Other Grant-Funded Services

1. Click **Participants** on the RAD System menu bar. The Participants Overview screen is displayed.

2. Click the name of the participant to have an Other Grant-Funded Service added to his record. The participant's Summary screen is displayed.



3. Click **Add Other Grant-Funded Service**. The Other Grant-Funded Services screen is displayed.

4. Select the Other Grant Funded Service type and enter the Date Started Service. Click **Save**.
   The activity will display on the participant's Summary screen.

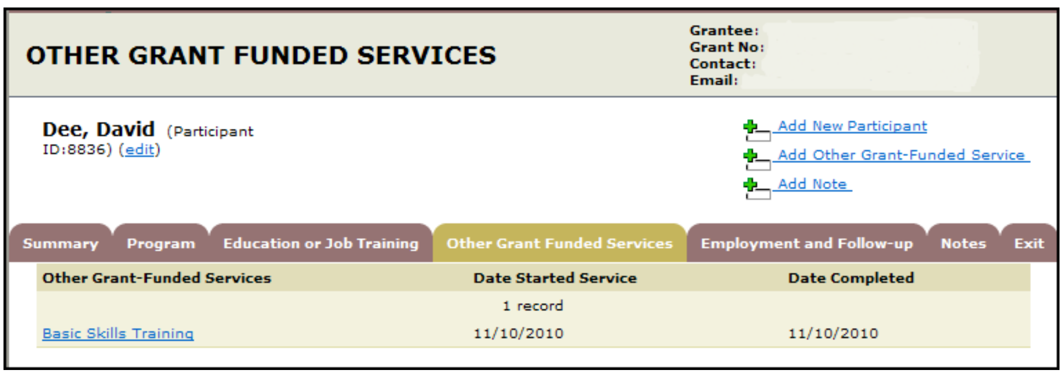
5. Once the participant has completed the service, update the service by entering the Date Completed field.

Update Other Grant-Funded Service

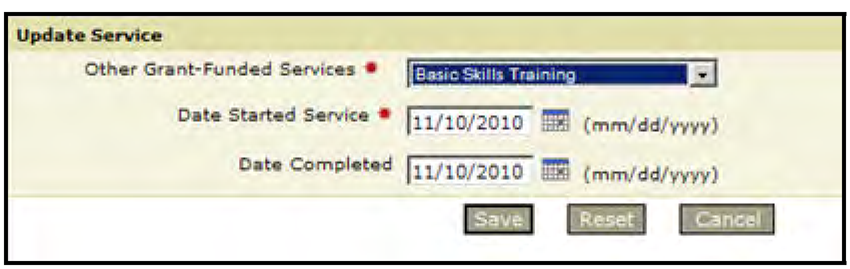
1. Click **Participants** on the RAD System menu bar. The Participants Overview screen is displayed.

2. Click the name of the participant to have an Other Grant-Funded Service updated in his record. The participant's Summary screen is displayed.

3. Click the **Other Grant-Funded Services** tab or the **Other Grant-Funded Services** link under the Category section of the Participant Summary page. The Other Grant-Funded Services summary screen is displayed.



4. Click the service to be updated. The Update Service screen for the selected service is displayed.



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

Delete Other Grant-Funded Service

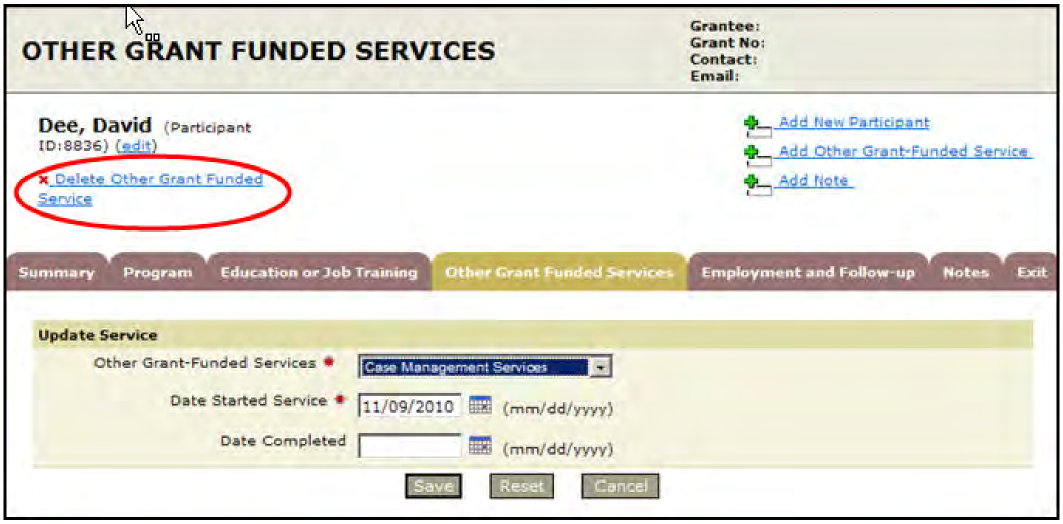
This function allows users (except Read-Only users) to delete an Other Grant-Funded service for an active participant. **Note:** Please ensure that any impacted Quarterly Progress Reports are recertified and resubmitted, if appropriate.

1. Click **Participants** on the RAD System menu bar. The Participants Overview screen is displayed.

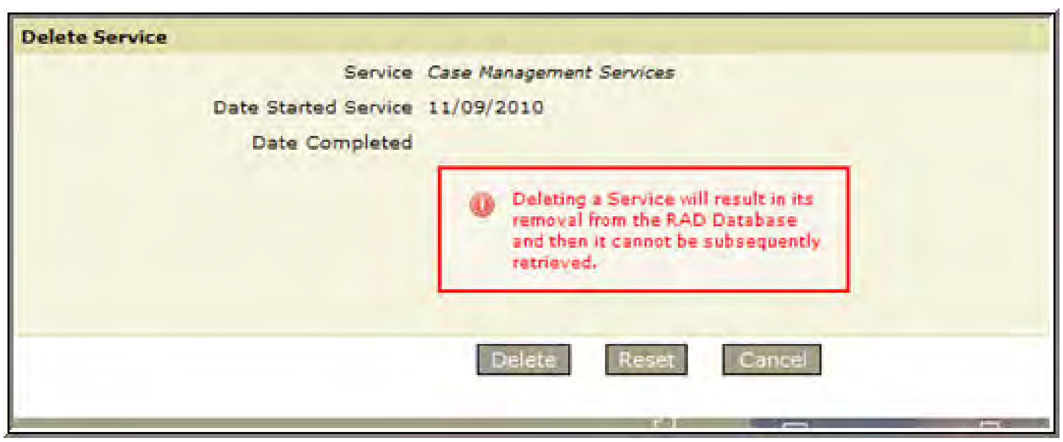
2. Click the name of the participant to have an activity deleted. The Summary screen for the participant is displayed.

3. Click the **Other Grant-Funded Service** tab or the **Other Grant-Funded Service** link under the Category section of the Participant Summary page. The Other Grant Funded Services screen is displayed.

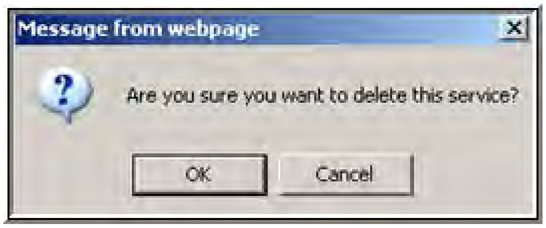
4. Click the link for the other grant-funded service to be deleted. The Update Service screen is displayed for the selected service.



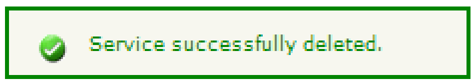
5. Click the **Delete Other Grant-Funded Service** link (just below the participant's name). **Note**: Once you select the delete service option, the participant's grant-funded service will be deleted from the RAD System and data cannot be restored. The Delete Service screen is displayed.



6. Click **Delete** to continue with the service deletion process. (To exit the service deletion process, click **Cancel**.) The confirmation to delete service prompt is displayed.



7. To complete the service deletion process, click **OK**. The participant's other grant-funded service record is deleted. The successful service deletion confirmation is displayed.



8. Please ensure that any impacted Quarterly Progress Reports are recertified and resubmitted, if appropriate.

Add/Update Employment and Follow-up Information

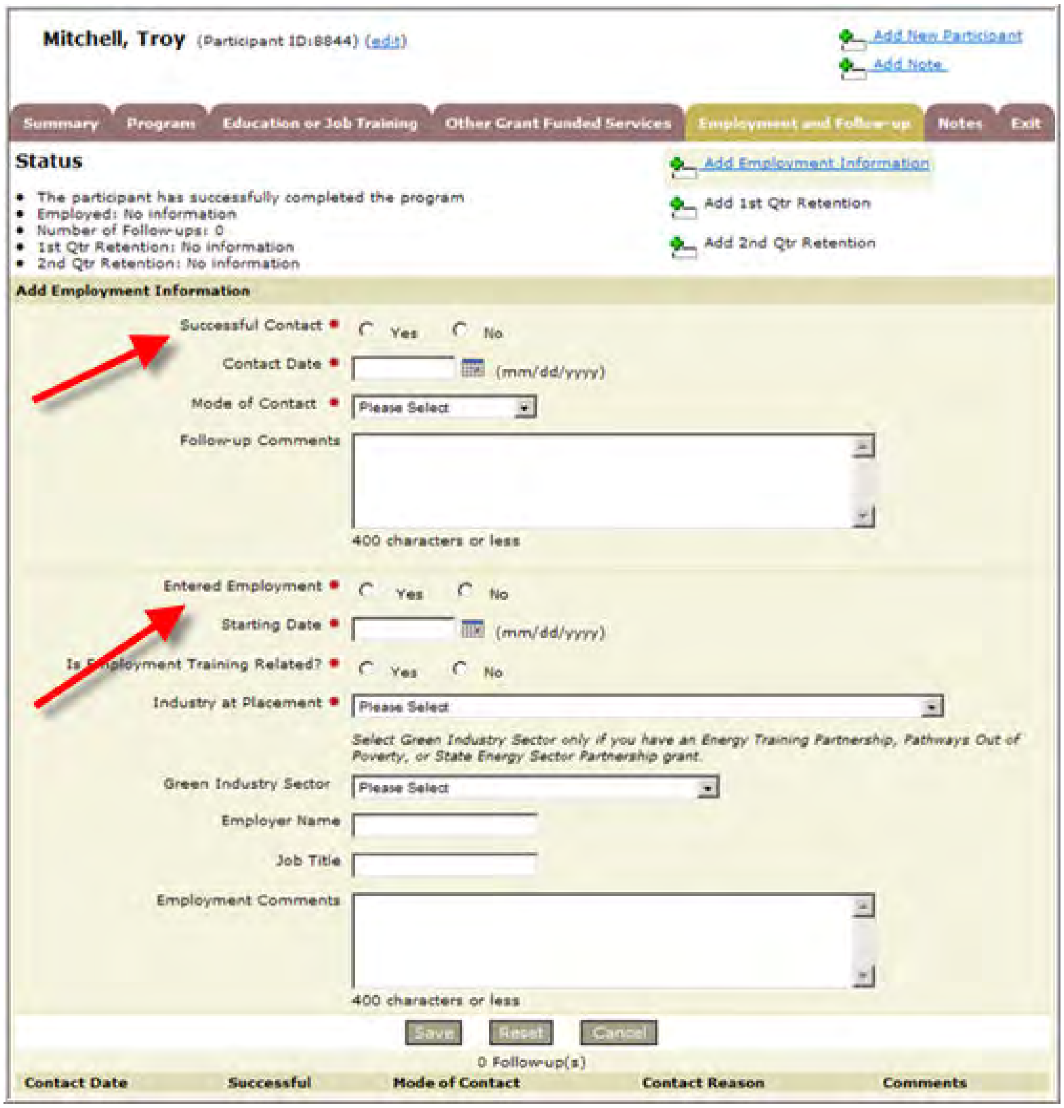
This part of the participant record is to be filled out after the participant has successfully completed the education or job training program. **Note:** Completion is recognized by the RAD System when the user enters **Yes** in the field, Has Participant Successfully Completed the Program? under the Program tab.

1. Click **Participants** on the RAD System menu bar. The Participants Overview screen is displayed.

2. Click the name of the participant to have employment information added to his record. The participant's Summary screen is displayed.

3. Click the **Employment and Follow-up** tab. The Employment and Follow-up screen is displayed. The participant's status for program completion, employment, and follow-up information is displayed under **Status**.

4. To add a follow-up, click **Add Employment Information**. The Add Employment Information screen is displayed.



5. Enter the follow-up information section**:** indicate Yes or No to Successful Contact, the Contact Date, Mode of Contact and any Follow-up Comments (up to 400 characters). If you enter No to Successful Contact, the employment fields become inactive (grayed out).

6. If you answered Yes to Successful Contact, continue by entering the employment information section. Indicate Yes or No to Entered Employment.

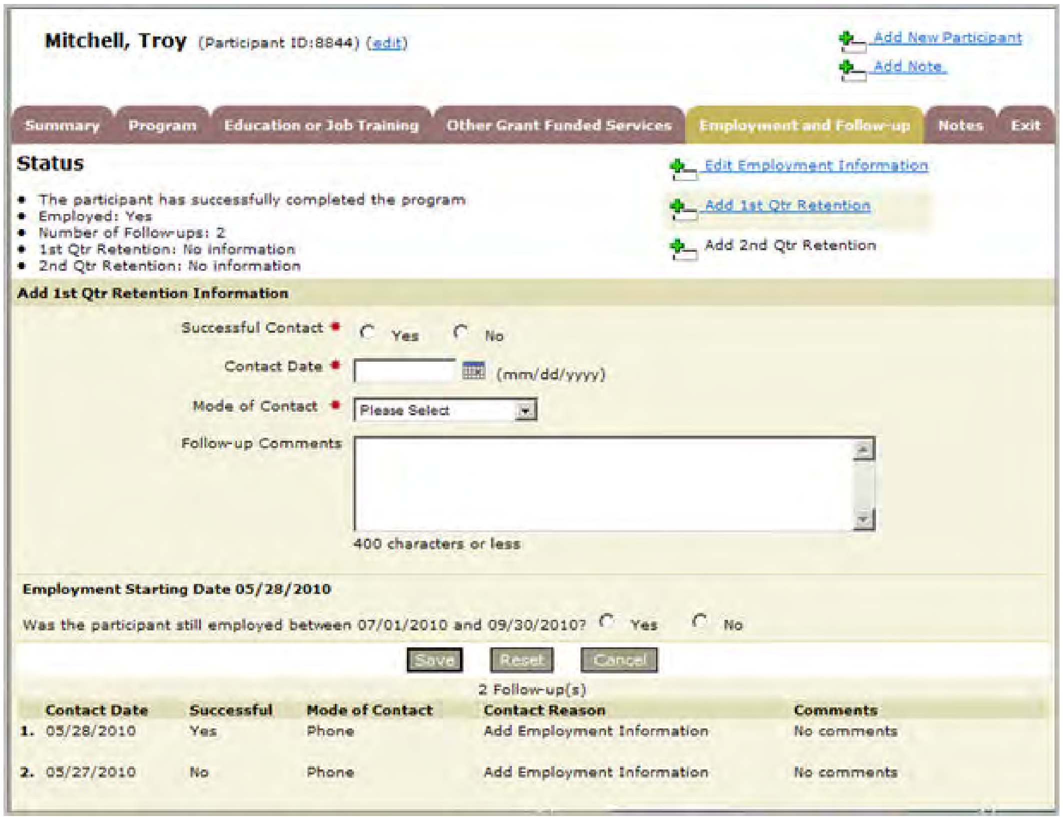
If you answer No to Entered Employment, the remainder of the fields in the employment section become inactive (grayed out). If you answer Yes to Entered Employment, continue by entering the rest of the employment information.

If you answer No to Is Employment Training Related? the following two fields - Industry at Placement and Green Industry Sector become inactive (grayed out).

7. When you complete the screen, click **Save**. The Employment and Follow-up screen is re-displayed. **Note:** The follow-up information you just saved is displayed at the bottom of the screen. The follow-up information cannot be updated, but the employment information can be updated as often as appropriate.

8. When the first quarter following the date participant Entered Employment arrives, the link for **Add 1st Quarter Retention** becomes active.

9. Click the **Add 1st Quarter Retention** link to enter 1st quarter retention information. The Add 1st Quarter Retention Information screen is displayed.



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

If you enter Yes to Successful Contact, you may answer the employment verification question. When you complete the screen, click **Save**. The Employment and Follow-up screen is re-displayed. **Note:** The follow-up information you just saved is displayed at the bottom of the screen. The follow-up information **cannot** be updated, but the employment information can be updated as often as necessary.

11. When the second quarter following the date participant "Entered Employment" arrives, the link for **Add 2nd Quarter Retention** becomes active. To enter 2nd quarter retention information, click this link. The Add 2nd Quarter Retention Information screen is displayed - repeat the instructions in Step 10 above.


EMPLOYMENT AND FOLLOW-UP
Grantee:
Grant No:
Contact:
Email:
Mitchell, Troy (Participant ID:8844) (edit)
Add New Participant
Add Note
Summary
Program
Education or Job Training
Other Grant Funded Services
Employment and Follow-up
Notes
Exit
Status
The participant has successfully completed the program
Employed: Yes
Number of Follow-ups: 3
1st Qtr Retention: Yes
2nd Qtr Retention: No information
Edit Employment Information
Edit 1st Qtr Retention
Add 2nd Qtr Retention
3 Follow-up(s)
Contact Date
Successful
Mode of Contact
Contact Reason
Comments
1. 10/01/2010 Yes Phone Add 1st Qtr Retention Information No comments
2. 05/28/2010 Yes Phone Add Employment Information No comments
3. 05/27/2010 No Phone Add Employment Information No comments

Add/Update Gap-in-Service (Delay Exit)

Normally, the System will handle exiting participants automatically (90 days from the end date of the latest activity or service). However, in certain situations, you may need to delay a participant's exit by adding a Gap-in-Service. A Gap-in-Service has a maximum period of 180 days. The participant must intend to return to grant-funded activities once the Gap-in-Service ends and must meet one of the following criteria: 1) delay before beginning of training (e.g., a summer break), 2) health/medical reasons or family care, or 3) temporary move from the area.

1. Click Participants on the RAD System menu bar. The Participants Overview screen is displayed.

2. Click the name of the participant to receive a Gap-in-Service. The Summary screen for the participant is displayed.

3. Click the Exit tab. The Exit screen is displayed.

4. Select the Gap-in-Service Exception (e.g., Delay before Beginning of Training, Temporary Move from the Area, Health/Medical Reason or Family Care).

5. Enter the date the Gap-in-Service will begin and the projected date that it will end. **Note:** The begin date for the Gap-in-Service cannot be greater than 90 days (in the future) from the current date. The end date cannot be greater than 180 days from the begin date.

6. Click **Save**. The Gap-in-Service exit date will override the System's automatic exit date.

7. **Update Gap-in-Service Information:** Follow the same steps (above) to update the Gap-in-Service. All of the fields may be updated, but the total period may not exceed 180 days. **Note:** You will not be able to update the fields if the participant has already exited.

Manual Exit

The Manual Exit function that was deployed in previous versions of the RAD System is no longer available. Manual Exit dates may not be saved or updated. However, you may send an email to the Applications Support Help Desk and request that the participant's status be changed to Manual Exit (see detailed instructions below).

Note: Participants that meet the criteria for a Manual Exit are still auto-exited in RAD after 90 days have passed from the end date of their latest service, regardless of whether or not they have successful program completion. The purpose of requesting a Manual Exit is to identify that the participant meets one of the criteria for Manual Exit and should not be tracked by ETA for the purposes of reporting Common Performance Measure Results.

If a grantee staff user needs to change a participant from an Auto-Exit status to a Manual Exit status, the following steps should be followed:

1. Send an email to the Applications Support Help Desk at appsupport.ebss@ dol.gov requesting that the participant be changed from an Auto-Exit status to a Manual Exit status.

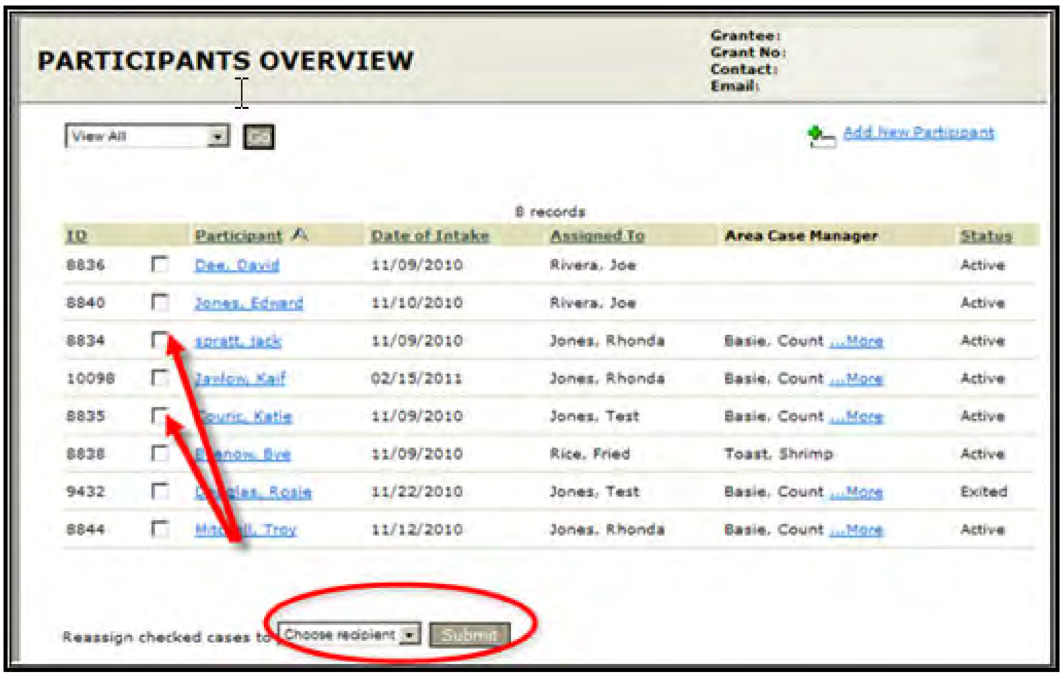
2. The email must specify the following: Grant Name, Grant Number, Participant ID, Manual Exit Reason Code and Description:

   a. Health or Medical
   b. Deceased
   c. Family Care
   d. Military
   e. Institutionalized
   f. Transferred or Relocated

Reassign Participants

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

1. Click Participants on the RAD System menu bar. The Participants Overview screen is displayed.



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

3. Select the receiving user in the Reassign Checked Cases to drop-down list.

4. Click **Submit**. Checked participants are reassigned to the selected user.

Quarterly Performance Report (QPR)

Quarterly Progress Report Introduction

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

Note: The ETA-9153 Form must be submitted by training grantees which include those grantees awarded under the following Solicitations for Grant Applications (SGAs):

- SGA/DFA PY-08-18 (Energy Training Partnership Grantees)
- SGA/DFA PY-08-19 (Pathways Out of Poverty Grantees)
- SGA/DFA PY-08-20 (State Energy Sector Partnership and Training Grantees)
- SGA/DFA PY-09-01 (Health Care Sector and Other High Growth and Emerging Industries Grantees)

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

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

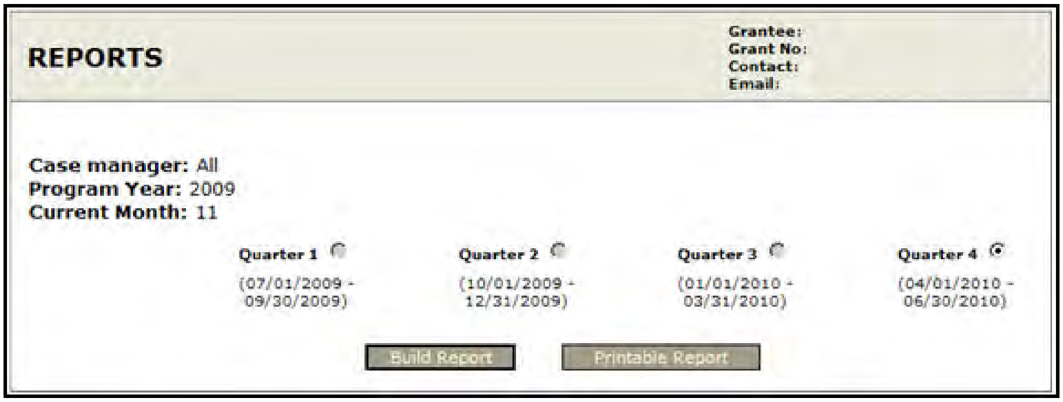
Build/Submit the ETA-9153 Form

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

1. Click **Reports** on the RAD System menu bar. The **Reports** screen is displayed.

2. Click **Grantee Quarterly Performance Report**. The Reports - select Case Manager and Program Year screen is displayed.

3. Select the user you wish to view or **All** if you want to see the report for your entire program and select the Program Year. Click **Submit**. **Note:** If a user is not assigned to any participants, their name will **not** appear in the drop-down list. The Reports - Select Quarter screen is displayed.

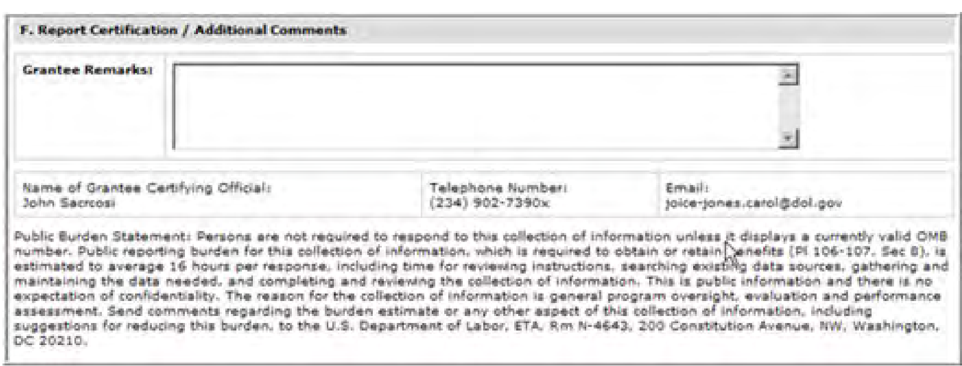


4. Select the quarter for the ETA-9153 Form you wish to build. **Note:** You may build a report for a quarter that has not yet ended, but you may **not** certify/submit for that quarter until the quarter ends. Also, you may **not** select a quarter that is in the future.

5. Click **Printable Report** to display a pdf version of the ETA-9153 Form (5 pages) that is only for viewing and printing. Click **Build Report** to display the ETA-9153 Form that can be certified and submitted under the authorized grantee's login password and PIN.

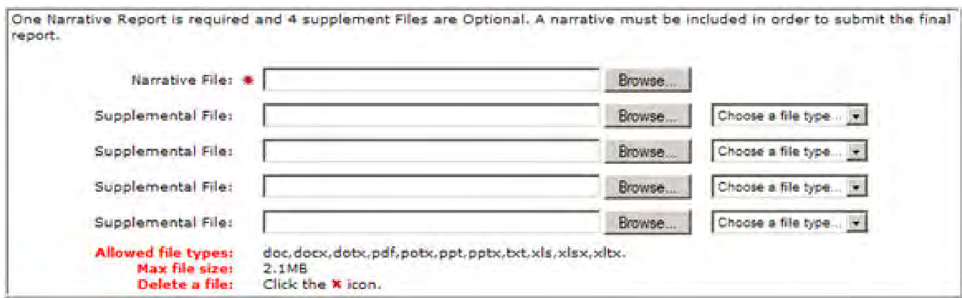
6. If **Build Report** is clicked, the following actions may be performed by the **Authorized Grantee Representative** prior to certifying and submitting the QPR:

   - Enter remarks in Section F- Report Certification/Additional Comments (this is optional).



- Upload the required Narrative Report - Click **Browse** next to the Narrative File field, and navigate to the desired document you want to upload. You may upload files in the following formats: 1) Microsoft Word, 2) Microsoft Excel, or 3) Adobe Acrobat (pdf). The maximum file size is 2.1MB.

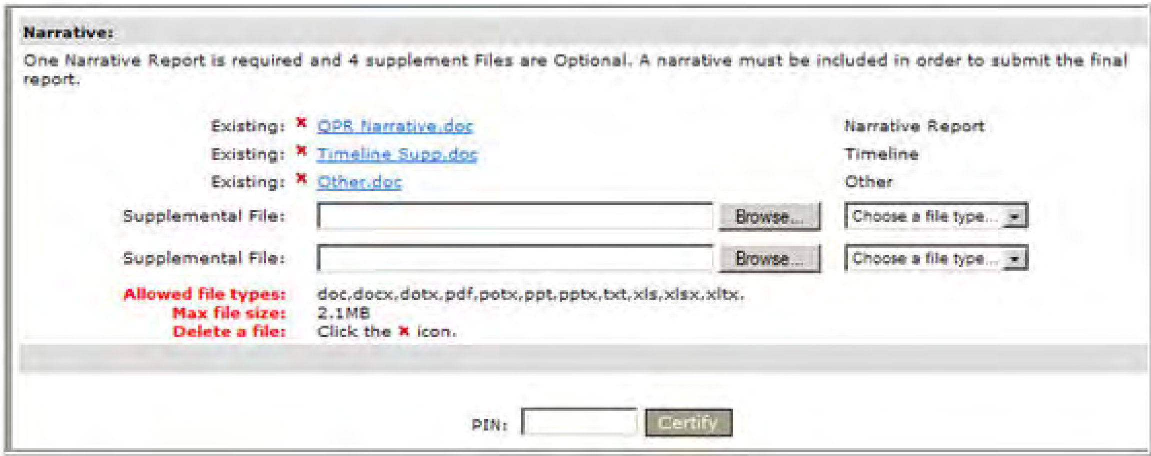
- Upload a maximum of four Supplemental Files (optional as attachments to the Quarterly Progress Report). Choose a file type from the drop-down list (choices are Timeline, Success Story, or Other). Then, click **Browse** and navigate to the desired document you want to upload. **Note:** If you do not select a file type for the Supplemental File, the document will note be uploaded into the System.



- Enter the Grantee's PIN and click **Certify** to submit the Quarterly Progress Report. When the Report is submitted, the following message is displayed: "You have successfully submitted the QPR."

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

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



Narrative:

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

Existing:	QPR Narrative.doc	Narrative Report
Existing:	Timeline Supp.doc	Timeline
Existing:	Other.doc	Other
Supplemental File:	Browse...	Choose a file type...
Supplemental File:	Browse...	Choose a file type...
Allowed file types:	doc,docx,dotx,pdf,potx,ppt,pptx,txt,xls,xlsx,xltx.	
Max file size:	2.1MB	
Delete a file:	Click the ✖ icon.	

PIN: Certify

View/Print Submitted Quarterly Progress Report

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

Note: This method allows report viewing and printing by all users (except Read-Only users). No changes can be made to the ETA-9153 Form, the Narrative Report, or the Supplemental file(s) through this viewing method. Only the Authorized Grantee Representative has access to replace attached files and recertify the report as outlined in the previous section, **Build/Submit the QPR**.

1. Click Reports on the RAD System menu bar. The Reports screen is displayed.

2. Click **Submitted QPR**. The Submitted Reports screen is displayed. All submitted reports, along with their program years and quarters, are displayed in the list.

3. **To view an ETA-9153 Form,** click the **Report** link for the desired report. The ETA-9153 Form will be displayed in pdf format (5 pages) including remarks. Click the print icon on the pdf menu bar to print the report.

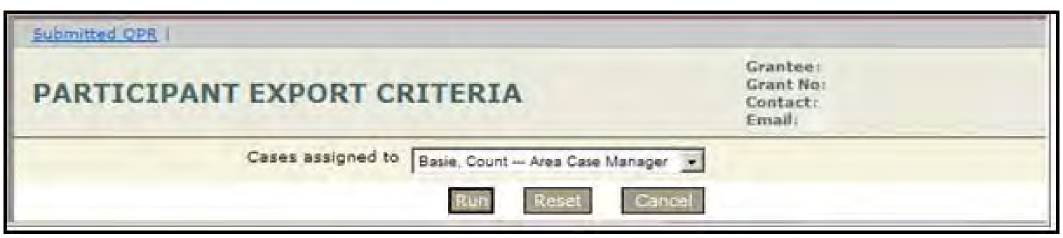
4. **To view Quarterly Progress Report attachments** (e.g., Narrative Report and Supplemental Reports) – click the number corresponding to the attachment you want to display. Each attachment is represented by a number in the **Narratives** column. The Narrative Report is represented by "1" and each Supplemental file is represented by the numbers "2" through "5" depending on the number of attached files. Attachments may be viewed, printed, and saved to your directory.

Participant Export Criteria

All Grantee staff (with the exception of the Read-Only user) may access and run the Participant Export Report. The Authorized Grantee Representative and Administrators may access all participant data. Area Case Managers and Case Managers may only access participant data in their own domain.

1. Click **Reports** on the RAD System menu bar. The **Reports** screen is displayed.

2. Click **Participant Export**. The Participant Export Criteria screen is displayed.

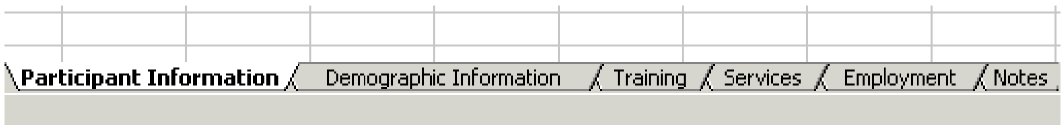


3. To select the user whose participant data will be displayed in the report, click the down arrow in the **Cases assigned to** field and click the user's name or click **All** to include all users on the list.

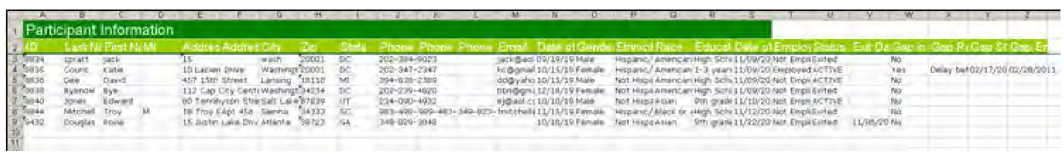
4. Click **Run** to generate the report.

5. A dialog box is displayed requesting you to click **Open** to display the report or **Save** to save the report as a file on your computer. Click the desired option.

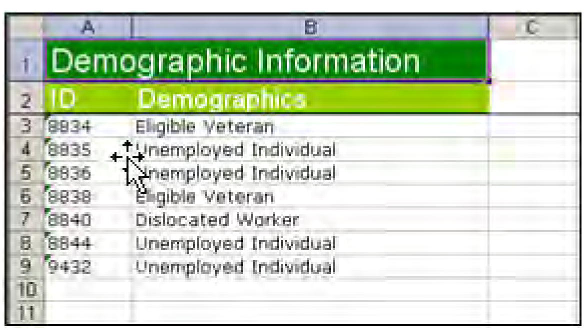
6. The report is displayed in Excel. The report data is separated under the following tabs:



TAB 1 – Participant Information



TAB 2 – Demographic Information



Demographic Information	
ID	Demographics
8834	Eligible Veteran
8835	Unemployed Individual
8836	Unemployed Individual
8838	Eligible Veteran
8840	Dislocated Worker
8844	Unemployed Individual
9432	Unemployed Individual

TAB 3 - Training

Training			
ID	Start Date	End Date	Training Activity
8834	10/15/2010	10/29/2010	On-the-Job Training Activities
8835	01/01/2010	02/01/2010	On-the-Job Training Activities
8836	11/09/2010	11/10/2010	Pre-apprenticeship Activities
8836	11/09/2010	11/10/2010	Classroom Training Activies
8838	01/10/2010	01/20/2010	Apprenticeship Activities
9432	05/01/2010	08/08/2010	On-the-Job Training Activities

TAB 4 - Services

Services			
ID	Start Date	End Date	Service Activity
8834	01/03/2011	02/25/2011	Case Management Services
8835	11/11/2010		Assessment Services
8835	11/08/2010	11/10/2010	Case Management Services
8836	11/10/2010	11/10/2010	Basic Skills Training
8838	06/20/2010	10/15/2010	Assessment Services
8838	03/30/2010	06/25/2010	Case Management Services

TAB 5 - Employment

Employment								
ID	Entered En	Starting Date	Is Emp	Industry at Placement	Green Industry Sector	Employer Name	Job Title	Employment Comments
8844	Yes	05/28/2010	Yes	NAICS 44-45 - Retail Trade	Energy Efficient and Advanced Dri	Bio-Land Inc.	biotech intern	

TAB 6 - Notes

Notes			
ID	Date Created	Entered By	Note
8834	11/10/2010	Katie Cole	You can still add a note on a participant after they exit the RAD System.
8835	01/25/2011	Rivera, Joe	This is a test to see if you can update a note. Yes I can.
8836	11/10/2010	Katie Cole	Participant entered activities and other services of very short duration - only 1 or 2 days.

Participant History Report

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

1. Click **Reports** on the RAD System menu bar. The **Reports** screen is displayed.

2. Click **Participant History**. The Report Criteria screen is displayed.

3. To select the user whose participant history reports will be displayed, click the down arrow in the Cases assigned to field and click the user's name or click **All** to include all users on the list.

4. Select the output format: PDF or Excel.

5. Click **Run** to generate the report.

6. The report is displayed in the selected output (see sample below).

Participant History Report

2 Participants

As of 02-18-2011 06:49 PM

jack spratt (Participant ID: 8834)

Participant Status:		Active
Intake Date:		11/09/2010
	Address	15 wash DC 20001
	Gender	Male
	Ethnicity	Hispanic/Latino
	Race	American Indian or Alaska
	Education	High School graduate or equivalent
	Birth Date	09/19/1987
	Age at First Grant Service	23
	SSN Entered	No
	Demographic	Eligible Veteran;

Training Information

Training Name	Start Date	End Date
No Information		

Service Information

Service Name	Start Date	End Date
No Information		

Program Completion and Credential Information

Has Participant Successfully Completed The Program?	Completion Date	Attained Credential	Credential Type	Additional Credential
Yes	10/29/2010	Yes	Certificate	n/a

Employment

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

Exit

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

Troy Mitchell (Participant ID: 8844)

Participant Status:		Active
Intake Date:		11/12/2010
	Address	18 Troy Road Apt 456 Sienna SC 34333
	Gender	Female
	Ethnicity	Hispanic/Latino
	Race	Black or African American
	Education	High School graduate or equivalent
	Birth Date	11/15/1985
	Age at First Grant Service	n/a
	SSN Entered	No
	Demographic	Unemployed Individual

Training Information

Training Name	Start Date	End Date
No Information		

Service Information

Service Name	Start Date	End Date
No Information		

Program Completion and Credential Information

Has Participant Successfully Completed The Program?	Completion Date	Attained Credential	Credential Type	Additional Credential
Yes	05/25/2010	Yes	Certificate	n/a

Employment

Entered Employment	Starting Date	Employment Training Related	Industry	Green Industry	Employment Retention
Yes	05/28/2010	Yes	NAICS 44-45 - Retail Trade	Energy Efficient and Advanced Drive Train Vehicle	1Q: Yes 2Q: Yes

Exit

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