# Quarterly Performance Reporting Listening Session

September 28, 2022

# Today's Speaker

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# Today's Session

- **What?** Forum for any QUESTIONS or CONCERNS from HVRP grantees on technical issues of QUARTERLY REPORTING

- **How to prepare?** Share your QUESTIONS and CONCERNS in ADVANCE of the session (HVRP@dol.gov) and/or DURING the session

- **Follow-up?** Q&A from each session shared following event

- **When?** *Moving to* second Wednesday of the last month of each quarter at 3:00 p.m. ET (exceptions during holiday periods)

# New and Updated Resources

- **TPR/TPN Checklist**:
  - Designed for Grant Officer's Technical Representatives (GOTRs), but also available as a resource for grantees.

- Updated **Competitive Grants TPR/TPN Desk Guide** posted to the HVRP website:
  - Includes requested additions to the Participant Tracking Sheet regarding military service.

- **TPR/TPN Live Demonstration**
  - Step-by-step guide to completing your program year (PY) 22 TPR and TPN.

# TPN Update

- Updated the [Technical Performance Narrative (TPN) form](#) to remove question regarding whether Federal Financial Report (FFR) is marked as final.
  - No longer relevant with Payment Management System (PMS).

# TPR Update

- The program year (PY) 2022 [VETS-701 Technical Performance Report (TPR)](#) is posted on the DOL [HVRP website](#).

- You can see the updated TPR [Summary of Changes](#) workbook for a line-by-line explanation of all modifications and the [Field Definitions Reference Guide](#) for the full list of explanatory comments embedded in the TPR.

# File Naming Methodology Reminder

| File Type | File Name | | | | | Format |
|---|---|---|---|---|---|---|
| VETS-701 Technical Performance Report | **12345**<br><br>Grant Award Number | **PY22**<br><br>Program year covered by the report | **Q1**<br><br>Report Quarter (1-8) | **TPR**<br><br>Report Type | **.xlsb**<br><br>Excel Format | MS Excel Macro Enabled Binary<br><br>The workbook containing the TPR should always be saved as an Excel binary file to enable the proper operation of macros and special formulas. |
| | **Finalized File Name: 12345-PY21-Q1-TPR.xlsb** | | | | | |

# Reminder–Quarterly Reporting Schedule

| Quarter | Quarter End Date | Grantee Submission Due Date | GOTR Review/Certification |
|---------|------------------|------------------------------|----------------------------|
| 1st | September 30 | October 30 | November 15 |
| 2nd | December 31 | January 30 | February 15 |
| 3rd | March 31 | April 30 | May 15 |
| 4th | June 30 | July 30 | August 15 |

# Copying and Pasting into the TPR

- General: When cutting/copying and pasting into the TPR, grantees should only use paste "special values" and should use the Spreadsheet View.

- Carryover Participants: Use the Data>Sort function on Exit Quarter (Z-A); those participants without exit dates will sort to the top of the list. Do not use the Exit Quarter column filter = "Blanks" as you will get errors when pasting those rows into the PY22 TPR.

- For additional instruction, see TPR Field Definitions Reference Guide, p. 1-2.

# Filtering in the TPR

- Row 5 of each column of the Participant Info tab has an arrow that, when selected, allows for filtering by specific values in that column.

- Any filtering can also be cleared by selecting the same arrow or by clicking the Clear Column Filters button at the top of the sheet and pressing the spacebar.

# Active vs. Follow-Up Period - TPR

- Follow-up reporting captures employment and earnings results of participants for four quarters after exit. This tracking of outcomes is defined as "follow-up activities" in the Funding Opportunity Announcement.

- Grantees record the follow-up outcomes of exited participants <u>in the TPR of the PY in which the participant exited</u>.
  - For instance, if a participant exits in PY21 Q3, the grantee will continue to track and record entries for that participant until four quarters of follow-up have transpired, which would be the PY21 TPR for Q4, Q5, Q6, and Q7.

- Note that the "Active" TPR for the current year may also contain follow-up activities, such as when a participant exits in Q1.
  - For example, when a participant exits in Q1, the 2nd quarter after exit employment and earnings would be captured in the current year's TPR for Q3 and Q4.

# Active vs. Follow-Up Period - TPN

- Grantees report on the status of their follow-up measures in the TPN "Follow-up Period" for Q5, Q6, Q7, or Q8.

- The graphic below shows the follow-up period timeline by PY and quarter.

| | Period of Performance (PoP) | | | | | | | | | | | | | | | | | | | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | Jul | Aug | Sep | Oct | Nov | Dec | Jan | Feb | Mar | Apr | May | Jun | Jul | Aug | Sep | Oct | Nov | Dec | Jan | Feb | Mar | Apr | May | Jun |
| | PoP Q1 | | | PoP Q2 | | | PoP Q3 | | | PoP Q4 | | | PoP Q5 | | | PoP Q6 | | | PoP Q7 | | | PoP Q8 | | |
| | Program Year (PY) - PY1 | | | | | | | | | | | | | | | | | | | | | | | |
| **Active** Enrollments & Exits | PY1 Q1 | | | PY1 Q2 | | | PY1 Q3 | | | PY1 Q4 | | | PY1 Q5 | | | PY1 Q6 | | | PY1 Q7 | | | PY1 Q8 | | |
| **Follow-Up 2QAE** | | | | | | | PY1 Q1 Exiters | | | PY1 Q2 Exiters | | | PY1 Q3 Exiters | | | PY1 Q4 Exiters | | | | | | | | |
| **Follow-Up 4QAE** | | | | | | | | | | | | | PY1 Q1 Exiters | | | PY1 Q2 Exiters | | | PY1 Q3 Exiters | | | PY1 Q4 Exiters | | |

| | | | | | | | | | | | | Jul | Aug | Sep | Oct | Nov | Dec | Jan | Feb | Mar | Apr | May | Jun | Jul | Aug | Sep | Oct | Nov | Dec | Jan | Feb | Mar | Apr | May | Jun |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | | PoP Q5 | | | PoP Q6 | | | PoP Q7 | | | PoP Q8 | | | PoP Q9 | | | PoP Q10 | | | PoP Q11 | | | PoP Q12 | | |

| | PoP Q5 | | | PoP Q6 | | | PoP Q7 | | | PoP Q8 | | | PoP Q9 | | | PoP Q10 | | | PoP Q11 | | | PoP Q12 | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | Program Year (PY) - PY2 | | | | | | | | | | | | | | | | | | | | | | | |
| **Active** Enrollments & Exits | PY2 Q1 | | | PY2 Q2 | | | PY2 Q3 | | | PY2 Q4 | | | PY2 Q5 | | | PY2 Q6 | | | PY2 Q7 | | | PY2 Q8 | | |
| **Follow-Up 2QAE** | | | | | | | PY2 Q1 Exiters | | | PY2 Q2 Exiters | | | PY2 Q3 Exiters | | | PY2 Q4 Exiters | | | | | | | | |
| **Follow-Up 4QAE** | | | | | | | | | | | | | PY2 Q1 Exiters | | | PY2 Q2 Exiters | | | PY2 Q3 Exiters | | | PY12Q4 Exiters | | |
| | Program Year (PY) - PY3 | | | | | | | | | | | | | | | | | | | | | | | |
| **Active** Enrollments & Exits | | | | | | | | | | | | | PY3 Q1 | | | PY3 Q2 | | | PY3 Q3 | | | PY3 Q4 | | |
| **Follow-Up 2QAE** | | | | | | | | | | | | | | | | | | | | | | PY3 Q1 Exiters | | | PY2 Q2 Exiters | | |
| **Follow-Up 4QAE** | | | | | | | | | | | | | | | | | | | | | | | | |

# Promising Practices/ Lessons Learned?

Please share any promising practices or lessons you have learned regarding HVRP quarterly performance reporting.

# Questions? Concerns?

What additional questions or concerns do you have about HVRP quarterly performance reporting?

# Upcoming Quarterly Performance Reporting Listening Sessions

New schedule starting October 1, 2022:

- Second Wednesday of the quarter ending month

Next quarter's Quarterly Performance Reporting Listening Session:

- Wednesday, December 14, 2022

How do I get on the mailing list for the Performance Reporting Listening Sessions?

- Please send your contact information, including your grant number (if a current recipient) and/or organization, to HVRP@dol.gov, requesting to be added to the HVRP email list.

# Thank you!

Please reach out to your GOTR with your questions and concerns on HVRP quarterly reporting.