



Learner Outcomes Tracking System (LOTS)



Skills for Small Business Grants
Grantee Portal
February 2024



Agenda

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1. Locating and Selecting a Skills for Small Business Project.
2. Viewing Business Partners, Job Titles, and Training Courses for a Skills for Small Business Project.
3. Working with Participants.
4. Performing Additional Actions.
5. Working with Training Courses.



Skills for Small Business Grant – Getting Started

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1. Log into the LOTS Grantee Portal.
2. Use the Project List grid to find the specific grant.
3. Click on the name link under Project Name to select the grant.



Project List								
Project Name	Grant Type	Primary Business Partner	Status	Created By	Creation Date	Date Last Changed	Action	
Project Name-SG-2023-Dec-22-16-10-40	Skills Development Grant	BP - Tamara 12	Project Development	tamaraGrantee	12/22/2023 4:10 PM	12/22/2023 5:04 PM CST	⋮	
Project Name-SG-2023-Dec-19-04-25-33	Skills Development Grant		Initiation	tamaraGrantee	12/19/2023 4:25 AM	12/19/2023 4:25 AM CST	⋮	
Project Name-Self-Sufficiency-2023-Dec-12-15-18-55	Self Sufficiency Grant		Expired	tamaraGrantee	12/12/2023 3:18 PM	1/10/2024 2:51 PM CST	⋮	
Project Name-Self-Sufficiency-2023-Dec-12-14-53-47	Self Sufficiency Grant		Active	tamaraGrantee	12/12/2023 2:53 PM	12/20/2023 3:51 PM CST	⋮	
Project Name-Self-Sufficiency-2023-Dec-12-14-51-26	Self Sufficiency Grant		Project Development	tamaraGrantee	12/12/2023 2:51 PM	12/20/2023 3:41 PM CST	⋮	
Project Name-SSBG-2023-Dec-08-13-52-40	Skills for Small Business Grant		Active	blakeStaff	12/8/2023 1:52 PM	1/26/2024 12:24 PM CST	⋮	
Project Name-SDF-2023-Dec-08-13-02-30	Skills Development Grant	TS Electric LLC	Initiation	tamaraStaff	12/8/2023 1:02 PM	1/10/2024 4:02 PM CST	⋮	
Project Name-SG-2023-Dec-08-09-59-44	Skills Development Grant	Nursing Home 01	Initiation	tamaraGrantee	12/8/2023 9:59 AM	12/20/2023 2:55 PM CST	⋮	
Project Name-Self-Sufficiency-2023-Dec-01-09-37-47	Self Sufficiency Grant		Initiation	tamaraGrantee	12/1/2023 9:37 AM	12/1/2023 9:37 AM CST	⋮	
Project Name-Self-Sufficiency-2023-Nov-30-15-23-57	Self Sufficiency Grant		Initiation	tamaraGrantee	11/30/2023 3:23 PM	11/30/2023 3:23 PM CST	⋮	



Skills for Small Business Grant – Project Summary Page

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After selecting a project, the Project Summary page displays. Use the icons to navigate through the project and view project details or update participant and course information.


Note: SSB projects will be entered into LOTS as an active grant; grantees must then update information for reporting purposes.

Skills for Small Business Grant Application

Project ID	Project Name	Project Status	Contract Number
979	Project Name-SSBG-2023-Dec-08-13-52-40	Active	2823-SSD-003


[Help](#) | [FAQ's](#)

Project Information




Project Summary


Other Actions




Supporting Document...



Business Partners



Employee Participant I...



Training Courses

[GO HOME](#)

Skills for Small Business Grant – Project Details Bar

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Pay close attention to the project details bar at the top of every page. For SSB, this bar will display:

- Project ID
- Project Name
- Project Status
- Contract Number (when applicable)

Use this bar to ensure that you are working in the correct project and to check project status.

Project ID	Project Name	Project Status	Contract Number
979	Project Name-SSBG-2023-Dec-08-13-52-40	Active	2823-SSD-003

The Help and FAQ links are available under the project details bar:

- Clicking Help will display the Texas Workforce Commission website.
- Clicking the FAQ button will display an FAQ in PDF format.



Skills for Small Business Grant – Project Summary Icon

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The Project Summary Icon displays on the project summary page. Clicking this icon will display grantee information, contact information, and contract information. This information is read only, no edits can be made.



College/University Providing Training Courses		
Blake's College		
Contact Information		
First Name	Middle Name	Last Name
Blake		Dobbs
Title		
president		
Primary Phone Number		Primary Phone Extension
7374710953		
Secondary Phone Number		Secondary Phone Extension
Email Address		Fax
tamara.sealy@twc.texas.gov		
Contract Information		
Submit Date	Begin Date	End Date
Dec 8, 2023	Jun 26, 2023	Jun 30, 2024
Contract Name*		
San Jacinto College Contract		
Contract Number*		
2823-SSD-003		
Contract Funding Amount*	Total Course Cost	Remaining Funds
100000		100000

Skills for Small Business Grant – Supporting Documentation

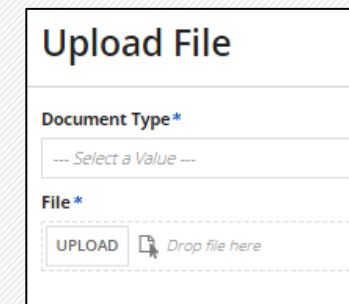
7

Clicking the SUPPORTING DOCUMENT icon displays the Supporting Documentation page. From this page, Users can search for existing supporting documents or add a new supporting document by clicking the UPLOAD FILE button.



Select the Document Type from the Dropdown menu and use the UPLOAD or the "Drop file here" features to add the document to the project. Once added, the document will appear in the Document List table on the Supporting Documentation page.

Note: Use the buttons under the action column to delete a supporting document.

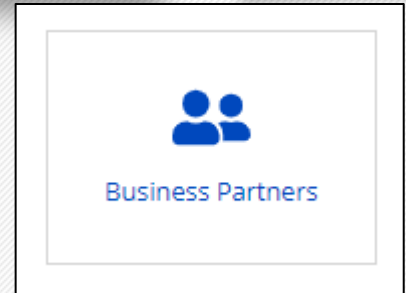
A screenshot of the "Upload File" form. It contains a "Document Type*" field with a dropdown menu showing "-- Select a Value --". Below this is a "File*" field with an "UPLOAD" button and a "Drop file here" area with a file icon.

Skills for Small Business Grant – Business Partner Icon

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The Business Partners icon displays a list of all Business Partners tied to the project. Clicking on the Business Partner's name under the Legal Name column displays the Business Partner detail page.

Note: This information is read-only, no edits can be made.



Skills for Small Business Grant Application

Project ID	Project Name	Project Status	Contract Number
883	Project Name-SSBG-2023-Nov-22-11-00-15	Active	2823-SSD-002

Business Partners List

Legal Name	TWC Account Number	Zip Code	Funding Date
Tamara's Business	521237546	77705	11/1/2023

Skills for Small Business Grant – Business Partner Detail Page

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The Business Partner detail page displays General Information and approved Job Information for that Business Partner. All information on this page is read only.

Note: Only TWC staff will be able to upload a TIF file for SSB grants.

The screenshot displays the Business Partner detail page. It is divided into two main sections: General Information and Job Information.

General Information

- Legal Name ***: Tamara's Business
- Street ***: 45 Maple
- City ***: Beaumont
- State**: Texas
- County**: Jefferson
- TWC Account Number ***: 52-1237546
- Funding Date ***: Nov 1, 2023
- TIF File (Upload) ***: Copy of 042155D001 - Collin... XLSX - 5.71 MB

Job Information

Job Title	SOC Code	Hourly Rate
Mechanical Engineer	12-4051	30
Marketing Manager	46-9023	42
Engineer	UNKNOWN	25
Economic Teacher	25-1063	25
Director of Human Resources	11-3121	25
Childcare Administrators	11-9031.00	14

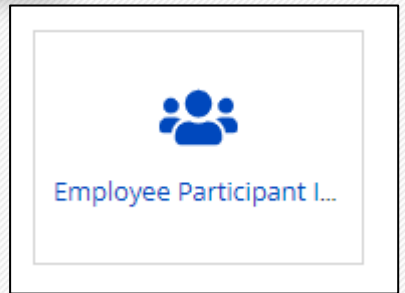
A blue arrow points to the TIF File (Upload) field.

Skills for Small Business Grant – Employee Participant Icon

10

The Employee Participants icon displays a list of all Employee Participants (trainees) tied to the project.

Note: This information is read-only, actions can only be made by clicking the buttons under the action column.



Employee Participant List

Q Search EmployeeParticipantSSBG

T ▾

Employee Name	SSN	Job Title	Grant Funded	Business Funded	Participant Status	Date Last Changed	Last Changed By	Actions
Jacob Jones	XXX-XX-XXXX	164	\$900	0	Approved	11/30/2023 1:19 PM	tamaraGrantee	⋮
Will Smith	XXX-XX-XXXX	165			Approved	12/20/2023 4:30 PM	theraStaff	⋮
Mary Lamb	XXX-XX-XXXX	166	\$1800	0	Approved	12/20/2023 4:42 PM	theraStaff	⋮
Danny Thib	XXX-XX-XXXX	167			Dropped Out	12/20/2023 4:31 PM	theraStaff	⋮
Carrie Bradshaw	XXX-XX-XXXX	168	\$1800	0	Approved	12/20/2023 4:26 PM	tamaraGrantee	⋮
Yolo Suco	XXX-XX-XXXX	204	\$900	0	Approved	12/28/2023 1:49 PM	tamaraGrantee	⋮
Penny Participant	XXX-XX-XXXX	205	\$900	0	Approved	12/21/2023 11:39 AM	adminRachel	⋮

7 items

Skills for Small Business Grant – Employee Participant Actions

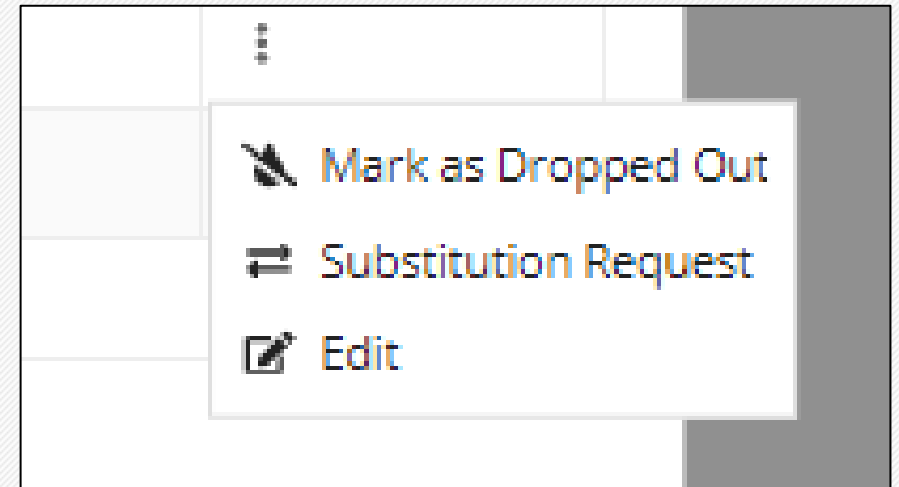
11

Within the Employee Participant List page, use the dots under the Action column to view or perform actions for a specific employee participant.

For an Employee Participant in “approved” status, the following actions are available:

- **Mark as Dropped Out:** Used when an approved trainee will no longer be attending training, and a trainee substitution will not be requested.
- **Substitution Request:** Used when an approved trainee will no longer be attending training, but a substitute trainee is being requested to attend in their place.
- **Edit:** Used to edit or update trainee information.

Note: The options available under the Action column will differ depending on the status of that employee participant.



Skills for Small Business Grant – Employee Participant Dropped Out Status

When selecting Marked as Dropped Out for a specific employee participant from the Action column option list, a participant status screen displays asking the user to confirm the status change of the participant. A reason for the dropout is also required. Click Save to save the response and confirm the change of status. The Employee Participant List page displays, and the new status will reflect for the participant.

Participant Status

Project ID	Project Name	Contract Number
883	Project Name-SSBG-2023-Nov-22-11-00-15	2823-SSD-002

Are you sure you would like to mark this participant as dropped out? If so, please provide a brief explanation.

Reason for Dropout *

Skills for Small Business Grant – Submitting an Employee Participant Substitution Request

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When selecting Substitution Request for a specific employee participant from the Action column option list, a substitution request status screen displays.

The existing employee's name appears at the top of the page and is read-only. The new employee's information should be entered into the form.

Click Submit at the lower right corner of the page to submit the request. An email will be sent to the Grant Manager who will review the request.

Substitution Request for Employee Participant

Project ID	Project Name	Project Status	Contract Number
883	Project Name-SSBG-2023-Nov-22-11-00-15	Active	2823-SSD-002

Existing Participant Information

Full Name
Yolo Suco

New Participant Information

Social Security Number*

First Name*

Middle Initial

Last Name*

New Participant Employment Information

Employer Name*
-- Select a Value --

Employer TAX ID

Employer ZIP Code

Job Title*

Occupation (SOC Code)*

Hourly Salary*

Skills for Small Business Grant – Pending Employee Participant Substitution Request

The screen will return to the Employee Participant List page. Notice the recent request now displays in the participant grid:

- The original participant status changed from approved to Pending Substitution.
- The new participant now displays with a status of Substitution Requested.
- The only actions available now for these two participants is View.

Yolo Suco	XXX-XX-XXXX	204	\$900	0	Pending Substitution	1/27/2024 6:01 PM	tamaraGrantee
Penny Participant	XXX-XX-XXXX	205	\$900	0	Approved	12/21/2023 11:39 AM	adminRachel
Wayne Thmpson	XXX-XX-XXXX	266	\$1800	0	Substitution Requested	1/27/2024 6:00 PM	tamaraGrantee

Skills for Small Business Grant – Agency Response to Employee Participant Substitution Request

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If the request is APPROVED, the status of the new participant will automatically change to “Approved” and the status of the original participant will change to “Dropped Out”.

If the request is DENIED, the Grant Manager must supply a comment. The status for the original participant will remain “approved” and the status for the denied participant will change to “rejected”.

Once a decision has been made regarding the substitution request, the grantee will receive an automated email from LOTS notifying them of the decision and supplying the Grant Manager comments if the request was denied.

Skills for Small Business Grant – Edit Employee Participant Information

16

When selecting Edit for a specific employee participant from the Action column option list, a participant detail screen displays. Any fields that the grantee can edit, or update will show in an editable box.

All other fields will display in read only.

TWC staff will add approved participants to the project. The grantee is responsible for adding all necessary information for each participant for tracking and reporting purposes.

Employee Participant

Project ID	Project Name	Project Status	Contract Number
883	Project Name-SSBG-2023-Nov-22-11-00-15	Active	2823-SSD-002

Participant Information

Social Security Number
463829649

First Name * Middle Initial Last Name *

Date of Birth

Street Apt, suite, etc.

City State Zip Code

Employment Status at the time of Entry

Is the student a Veteran?
 Yes
 No


Skills for Small Business Grant Project – Adding a Course for an Employee Participant

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The Employee Participant detail page displays a Participant Courses section. Click the ADD COURSE button within this section to add a course for that employee participant. The Participant Course screen displays.

Participant Courses

Search SEARCH Y ⊞

+ ADD COURSE 

CIP Code	Course Name	Begin Date	End Date	Completed Hours	Total Hours
No items available					

Total Hours of Training 0 Participant Funding Cost 0

Skills for Small Business Grant Project – Participant Course Page


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Complete the required fields on the Participant Course page and hit save to add the course to the participant's profile. The course will now appear in the table on the Employee Participant detail page under the Participant Courses section.

Manage Course

Project ID	Project Name	Project Status	Contract Number
883	Project Name-SSBG-2023-Nov-22-11-00-15	Active	2823-SSD-002

Course Name *

Begin Date *
 

End Date
 

Total Participant Hours Completed *

Skills for Small Business Grant Project – Viewing a Course for an Employee Participant

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The newly added course will now appear in the table under the Participant Course section within the Employee Participant detail page. Clicking Save or Cancel will display the Employee Participant list page.

Participant Courses

Search LO_EmployeeCourseMapSSBGs

CIP Code	Course Name	Begin Date	End Date	Completed Hours	Total Hours
90799	Radio, Television, and Digital Communication, Othe	7/6/2023	8/31/2023	5	20

Total Hours of 5 Training Participant Funding Cost \$1,000.00

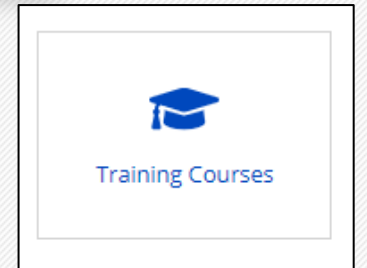
Now that the course has been added to the participant's profile, you can click on the course name under the Course Name column to edit any of the course data for that participant.

Skills for Small Business Grant Project – Training Course Icon

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The Training Course icon displays a list of all training courses tied to the project.

Note: This information is read-only, actions can only be made by clicking the buttons under the action column.




Training Course List

Read-only Grid

Q Search Training Course

CIP Code	Course Name	Course Start Date	Course End Date	Course Hours	Course Cost	Status	Comments	Date Last Changed	Last Changed By	Actions
10101	Computers in Medical Office	11/1/2023	2/1/2024	12	200	Active	Added from TIF file	12/20/2023 4:28 PM CST	theraStaff	⋮
10101	Healthcare Ethics & HIPAA	11/1/2023	2/1/2024	12	700	Active	Added from TIF file	12/20/2023 4:28 PM CST	theraStaff	⋮
10101	Health Career Success	11/1/2023	2/1/2024	12	350	Active	Added from TIF file	12/20/2023 4:29 PM CST	theraStaff	⋮



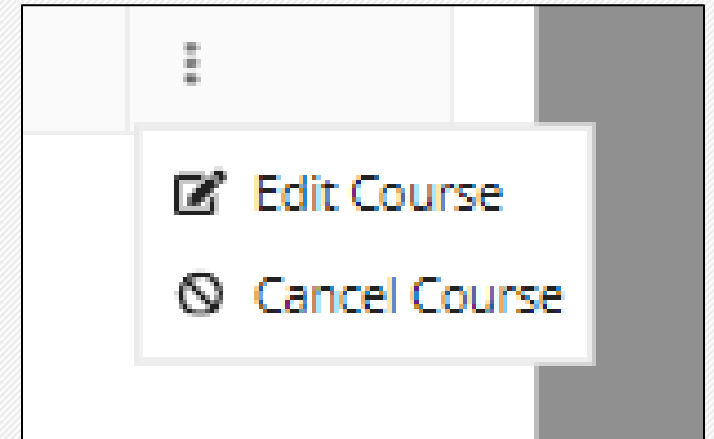
Skills for Small Business Grant – Training Course Actions

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Within the Training Course List page, use the dots under the Action column to view or perform actions for a specific course.

For a course in “active” status, the following actions are available:

- **Edit Course:** Used when edits are required for a specific training course; clicking this option will display the training course detail page and all fields that can be edited display in an editable field.
- **Cancel Course:** Used when the course has been cancelled by the training provider and no participants will attend the course; the course will display in the Training Course List, but the status will be cancelled.



Note: The options available under the Action column will differ depending on the status of the course.

1. Job Aid: View the related Job Aid for this course – Skills for Small Business
2. Related Courses
 1. Introduction to LOTS
 2. Self-Sufficiency Fund
 3. Skills Development Fund

All training documents are available on the [TWC LOTS webpage](#).

Wrap-up

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