

**871—58.16(7B,PL97-300,PL102-367) Grantee report requirements.**

**58.16(1) State reports.** There are three reports which are required to be filed by each grantee with the department: the monthly progress report, file merge report, and the annual report. Instructions for completion and any necessary data or forms will be provided in writing to the grantee by the department.

**58.16(2) Monthly reports.** The information entered into the department's management information system (MIS) is the official database of the Iowa JTPA program. All reports must be consistent with the data contained in the MIS. To ensure consistency, reports must be completed at the same time and use the same reporting period as the file merge reports which are prepared and submitted by the fifteenth of each month using the last day of the previous month as an end date for the reporting period. After a file merge report is submitted, any other reports submitted for the same reporting period must agree. No additional data should be included for that reporting period which would change a subsequent report for the same reporting period.

*a. Monthly progress reports.*

(1) This report contains data on enrollments, participant characteristics, terminations, activities and services, budgets, expenditures, participant service levels, and performance measures. Information from these standardized reports will be distributed quarterly via JTPA issuance and will also be disseminated at meetings of the WDB, PIC chairpersons, chief LEOs and to other interested parties as requested. The information contained in these reports will be used to identify specific areas where technical assistance is needed.

(2) A report must be generated for the Title IIA adult and youth program, the Title IIB summer youth employment and training program, the dislocated worker center program, the state education coordination and grants program, and the older individual training program in each SDA each month. A report must also be generated for any special project or program such as: the state education coordination and grants offender projects, the Title IVC veterans programs, and the Title III discretionary grants. These reports must be completed as designated in the appropriate grant agreement.

(3) These reports must be signed by the grantee certifying the accuracy of the information and must be received by the division administrator with a copy to the appropriate field administrator by the fifteenth of each month for the preceding month except that the final monthly progress report for each program year must be received by July 31. All data for the program year must be entered into the system prior to completing the final monthly progress reports. A copy of the monthly progress report for the state education coordination and grants program must also be sent to the department of education. For Title IIB, reports are due on July 15, August 15, September 15, and October 15 with the final report due on November 15.

*b. File merge report.*

(1) The file merge report contains data on all titles and programs and is compiled by merging files in the management information system (MIS) as instructed by the department in the JTP information system user news. This merged data is then transmitted electronically to the department.

(2) The file merge reports from all SDAs are entered into the department's database, where the data is used to compile aggregate reports and analyze data at the state and SDA levels.

(3) The file merge reports must be submitted for each month by the fifteenth of the following month, except for the end-of-program-year file merge report which must be received by July 31. All data for the program year must be entered into the system prior to running the end-of-the-year file merge report.

**58.16(3) Annual report.**

*a.* Several narrative reports are required in connection with JTPA activities. Section 104(b)(10) requires the PIC and LEOs in each SDA to submit an annual report to the governor; state legislation requires the department to submit an annual report to the Iowa general assembly. The WDB is required to submit an annual report to the governor concerning all JTPA activities.

*b.* To coordinate all requirements, a report must be submitted annually for the following JTPA titles and programs:

- (1) Title IIA adult and youth program;
- (2) Title IIB summer youth employment and training program; and
- (3) Title III dislocated worker center program; and, if applicable,

- (4) State education coordination and grants programs;
- (5) Older individual training program;
- (6) Title III discretionary dislocated worker program; and
- (7) Title IVC veterans employment program.

*c.* The annual report for each title or program must include the cumulative information from the final monthly progress report for the program year plus a description of programs conducted during the program year. The narrative description should be no longer than five typewritten pages. Other elements may be included at local option.

*d.* Financial information contained in the annual report must agree with the grantee's close-out information which is submitted to the department.

*e.* All annual reports must be signed by the PIC chairperson and chief elected official, except for 8 percent projects and Title IVC.

*f.* All annual reports must be received by the division administrator no later than September 15 following each program year end. A copy of the state education coordination and grants program report must be submitted to the department of education (DOE) based on the agreement between the administrative entity and DOE. Since the Title IIB summer youth employment and training program is on a different program year cycle, the annual report for Title IIB will be for the previously completed summer program year.

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