Engage User Guide

The Children's Learning Institute (CLI) Engage platform houses multiple applications, including the system for scoring Texas Rising Star (TRS) visits and access to online training. The Engage User Guide provides guidance to TRS staff for navigating the Engage platform. Google Chrome is the preferred browser when using Engage.

Table of Contents

All Program Directors

This section can be extracted and shared with ELPs to support their directors/administrators in completing an interest form.

Interested in Texas Rising Star Certification

This section provides instructions to ELP that are interested in obtaining Texas Rising Star Certification and how to get on-boarded to the CLI Engage platform with CLI.

STEP 1: Each interested ELP will visit the Texas Rising Star website at www.texasrisingstar.org and click on the Providers tab and select "Getting Ready to Apply".

STEP 2: Locate the "Step 2: Interest Form" section under "Are You Interested in applying to Texas Rising Star" section.
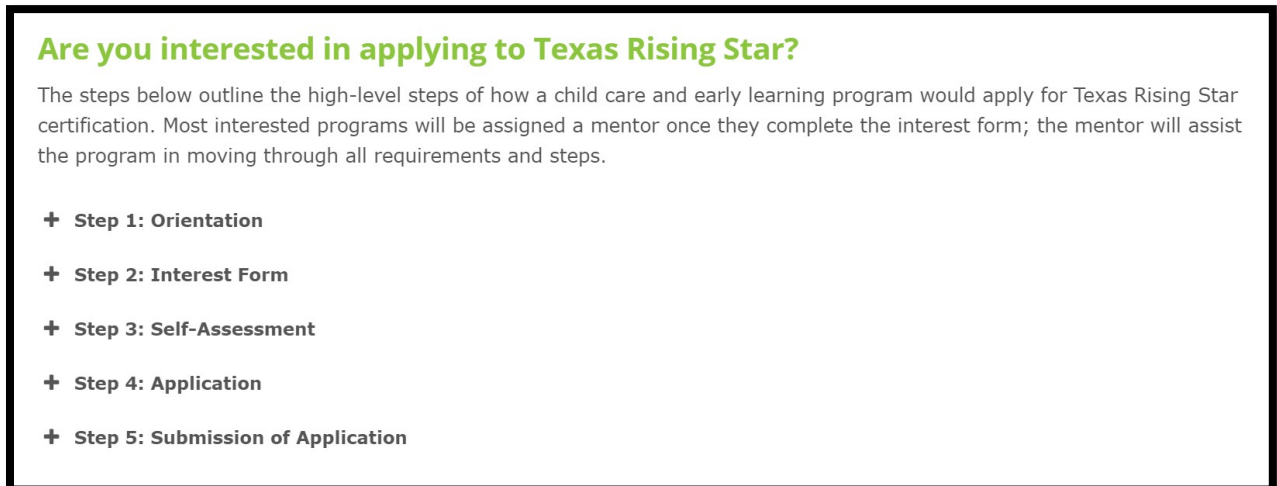
STEP 3: Click the **(+)** to expand the section and locate the interest form link.
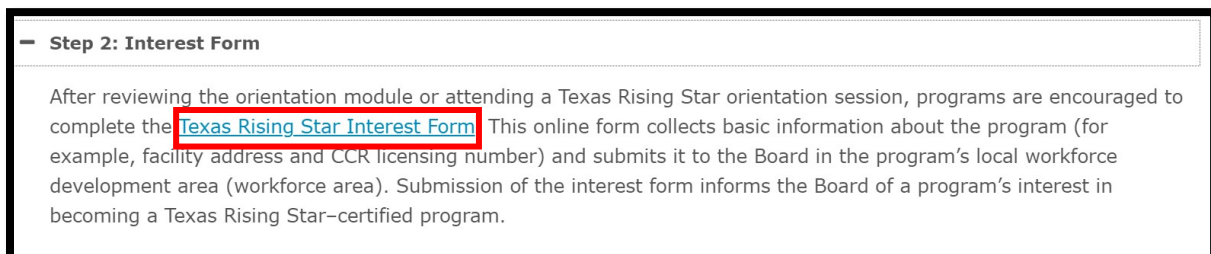
Step 4a: The Program Director completes the Interest Form and clicks submit.
This form collects basic information about the ELP and is routed to the CSA at CLI to verify information. A copy of this information also gets emailed to the LWDB based on the County selected on the interest form.

STEP 4b: The LWDB will receive notification of the Interest form submitted by the ELP via the email associated with that LWDB. The LWDB's CDU will then begin to prepare to add the applicable TRS Specialist staff that will work with the ELP and be notified of the school's activation in CLI Engage by the CSA at CLI.

**** EXTERNAL EMAIL ****

The school below has submitted an interest form and will be automatically added into CLI Engage for the Texas Rising Star Assessment Tool 2.0. Within 20 business hours (2.5 business days) of receiving this email you should be able to assign the roles of mentors/assessors to the school listed below.

If after 28 business hours (3.5 business days) you do not see this school within your Board's school list or have issues assigning staff, please submit a Texas Rising Star Help Ticket to include the program's name, CCR license number and date the interest form email was received.

Interest Form Details:

- *Name of Facility:* Test School 1
- *CCR License Number/Operator Number:* 1249319
- *Street Address:* 7000 Fannin
- *Zip Code:* 77030
- *City:* Houston
- *My Program is located in:* Harris County (Gulf Coast WDB - 28)
- *Facility Telephone Number:* 7135003788
- *Days and Hours of Operations:* saturdays 9-11
- *Owner's Name:* Miguel Gallegos
- *Director's Name:* Miguel Gallegos
- *Requestor Name:* Jasmine Wiggins
- *Email Address:* trs19uat@gmail.com
- *Phone Number:* 7135003616

STEP 4c: Once the school has been activated in CLI Engage by the CSA, the CDU will grant access to the TRS Specialists that are assigned to the interested program to prepare them for applying for Texas Rising Star Certification.

When the Program is Ready to Apply
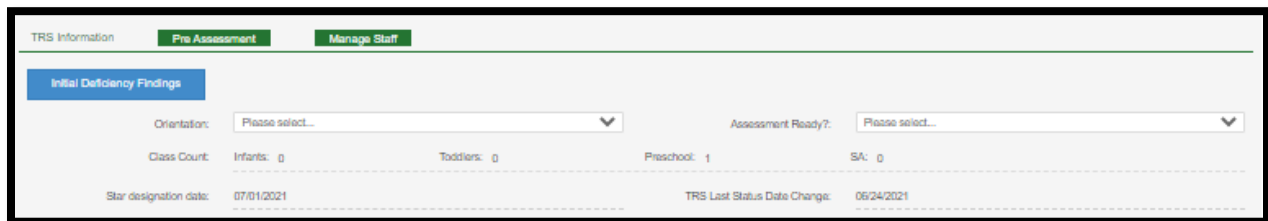
When the TRS Specialist has determined that the ELP is ready to apply for TRS Certification, the Program Director will upload the following documents to CLI Engage via the School Management tab for the TRS Specialist to review.

1. TRS Initial Screening Form
2. TRS Application
3. Facility Self-Assessment Record Form
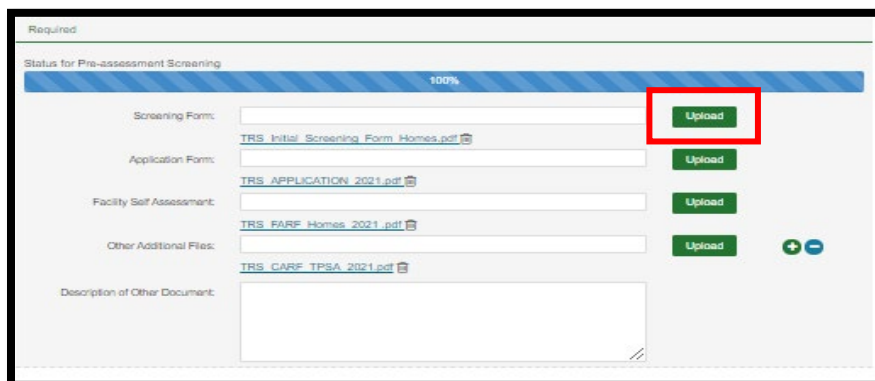
STEP 1: Locate the School Management tab

STEP 2: Click on the Pre-Assessment button.

STEP 3: Locate the Required section and upload the required documents and press submit. This alerts the TRS Specialist (assigned to this school) via email that new documents have been submitted for review.

- Documents such as facility staff lists, handbooks, teacher files (for those that do not have a TWR account), and other program documents can be uploaded to the *Other Additional Files* section along with a description of the documents in the section underneath the files section.

STEP 4a: Once all documents are uploaded, click the submit button. The assessor assigned will be notified via email that new documents have been uploaded for review.
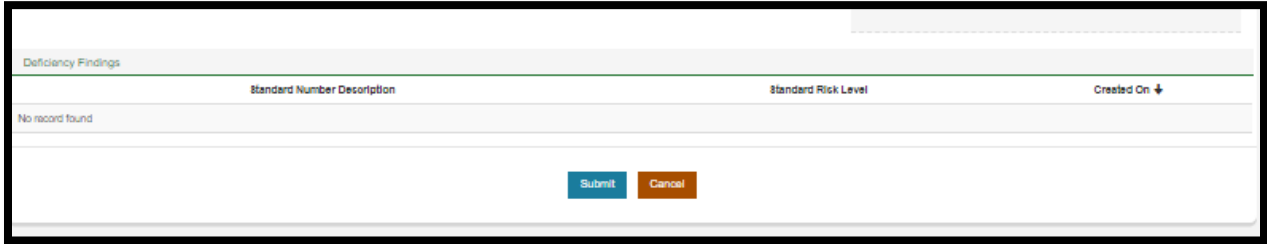

STEP 4b: Once the documents along with screening deficiencies have been reviewed, the assessor will contact the Program Director with next steps.

Continuous Quality Improvement Plan (CQIP)

Mentors should help the ELPs determine their strengths and weaknesses and should provide access to mentoring services to assist them in achieving certification, reaching higher levels, and continuously improving. Mentoring services may vary based on the ELP's needs and readiness level; however, a minimal protocol of mentoring is required and is described in the *staff handbook*.

The Continuous Quality Improvement Plan (CQIP) tool is designed to support Texas Rising Star (TRS) mentors in working with childcare programs to continuously improve the quality of their practice. Mentors can use this tool to assign goals to TRS directors and staff, write action plans, and document progress. The tool then generates a report for the mentors, staff, and directors to use to complete the CQIP and track progress over time.

Click on the link to access the CQIP guides on CLI Engage
CQIP User Guide

New Staff Onboarding

When new staff have been hired, take the following steps to get them onboarded to Texas Rising Star.

☐ 1. Notify TWC of the new staff and their <u>role per their reporting policy</u>.

☐ 2a. Create the new staff's CLI Engage account and assign them to a demo school as part of Engage account creation. (See the EUG for detailed guidance on How to Add TRS Specialist.)

   2b. The new staff must accept the invitation sent to their email for the CLI Engage account to be activated. (Please refer to the EUG for steps on How to Accept invitation.)

☐ 3. Notify CLI of the new staff including the new staff's name, role, email address, and the Workforce Board via the Help Ticketing System. CLI will enroll the new staff in the TRS Assessor/Mentor Training and Certification Program (ATCP).

☐ 4. The new staff will complete the ATCP in CLI Engage. Please see the table below for details on which courses to complete based on staff's role. Note: All staff will complete content modules and course quizzes to earn a certificate with clock hours for training. *For Assessors/Dual Role certification coding modules MUST be completed in addition to the content modules.*

Course	Modules	Role
Course 1- Overview	1.1	All staff
Course 2- Certification Roles	2.1-2.5	All staff
Course 3- Category 1 & Category 3	3.1-3.5	All staff
Cert. Coding modules *stop and await results email before proceeding*	3.6-3.7	Assessors/Dual *only*
Course 5- Category 2	5.1-5.34	All staff
Cert. Coding modules *stop and await results email before proceeding*	5.35-5.39	Assessors/Dual *only*
Course 6- Category 4	6.1-6.13	All staff
Cert. Coding modules*stop and await results email before proceeding*	6.14-6.18	Assessors/Dual *only*
Course 18- Category 3: Program Management	18.1-18.3	All staff
Course 7- Comp Exam	7.1-7.2	Assessors/Dual *only*
Course 8- TRS Assessor Certification Coding Practices	8.1-8.7	Assessors/Dual *only*
Course 9-Mentor course (TBD)		Mentors *only*
Course 10- Technology (TBD)	10.1-10.2	All staff

Note: Please see EUG on the Resources tab of CLI Engage for detailed guidance on technology functionalities. For issues with Engage, please submit a Help Ticket.

Community District User and Community District Specialist
Add TRS Specialist Role

This section provides instructions to CDUs and CDSs on how to add users (TRS specialists role—TRS assessors/mentors).

STEP 1: Log in to CLI Engage.

On your CLI Engage Dashboard, click on the Management button under the Administrative Tools section.
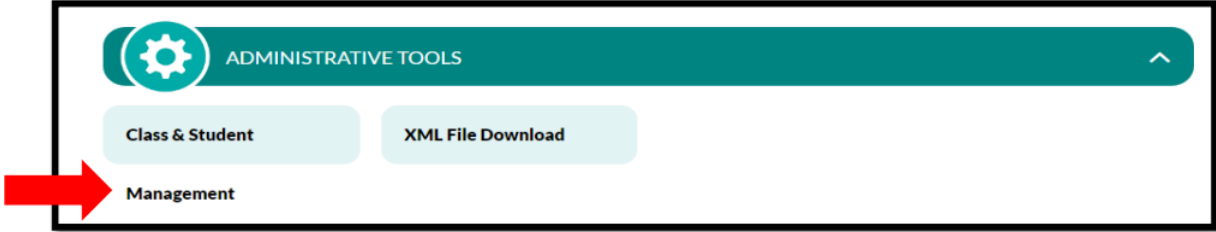
STEP 2: Click on the User Management tab.
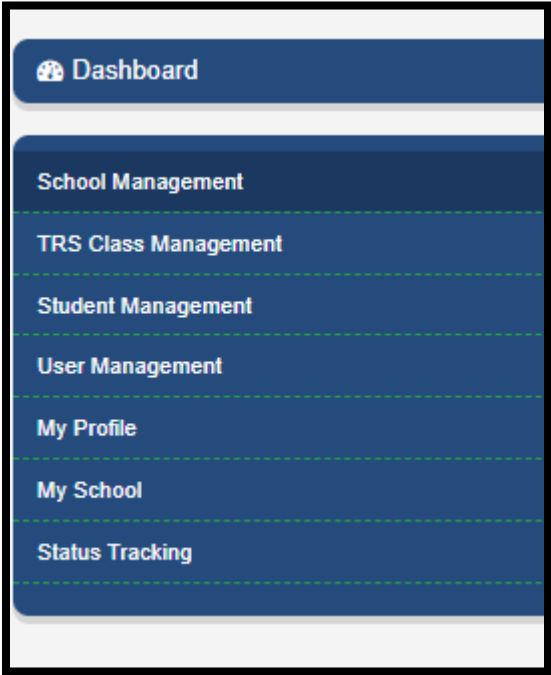
STEP 3: Click on Add TRS Specialist (both for a TRS assessor or TRS mentor). Enter all required information.

STEP 4: Click on Submit & Invite to send the invitation to the TRS specialist's e-mail account.

If staff are no longer employed by the Board, please be sure to make their CLI Engage account inactive and notify CLI via the Help ticketing system

How to Grant Access and Assign Roles

This section provides instructions to the CDU or the CDS on how to grant to the TRS assessor and mentor access to the school with which they will work. The CDU or CDS user also assigns the TRS assessor and mentor roles to the school. Additionally, the section provides instructions on how to assign more than one assessor or mentor to a school.

This procedure allows the TRS assessor and mentor to view the school in their My Schools list. The CDU or CDS user must grant the TRS assessor and mentor access to **each** school. The CDU or CDS user must assign the role of TRS assessor and TRS mentor to allow the TRS assessor and mentor access to view the schools in their My Schools list, start a TRS Assessment, or view TRS Reports.

The prerequisites for granting access and assigning roles are as follows:
- A Google account for the TRS specialist role (TRS assessor or TRS mentor) must be active.
- The schools must be Active.

Granting Access

STEP 1: Log in to CLI Engage.

STEP 2: Go to Administrative Tools and click on the Class & Student Management button.
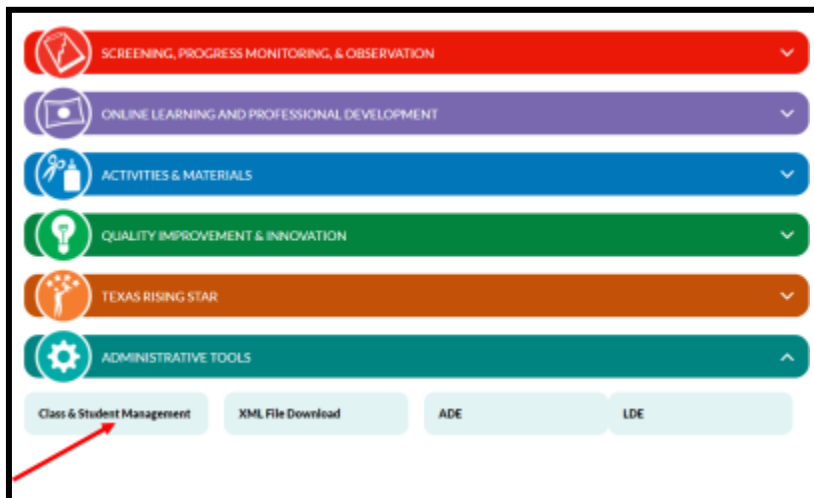
STEP 3: Click on User Management and then click on TRS Specialist.
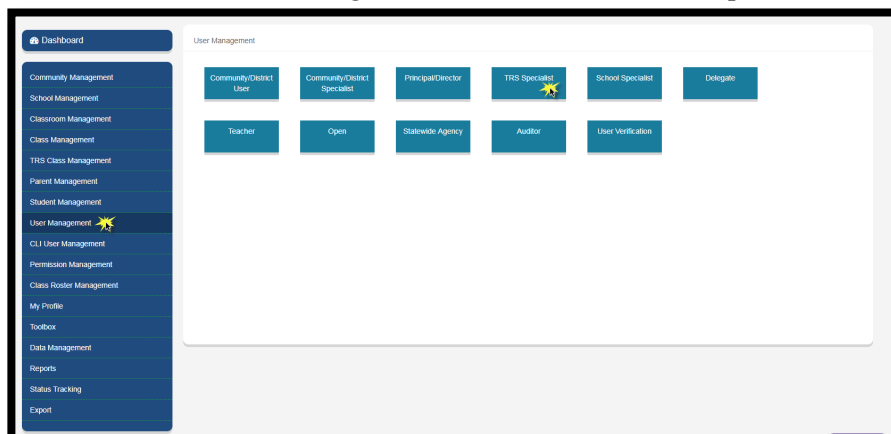
STEP 4: Find the TRS specialist (TRS assessor and/or TRS mentor) to whom you want to grant access to the school. This will allow the TRS assessor to start a TRS assessment and the TRS mentor to view the finalized reports. Enter the first and last name of the TRS specialist and click on Search.

STEP 5: To grant access for the TRS assessor or mentor to see the school, click on the Assign Schools button, which is the fourth button under the Action section. (See the expanded view below.)

STEP 6: To grant access to schools, assign the school or schools to **each** TRS assessor or mentor. The image below shows that no schools are assigned yet.

STEP 7: Select the schools to be assigned and click on the forward double arrows, shown beneath the vertical arrow below. This permits you to select the schools that the TRS assessor or mentor can view.
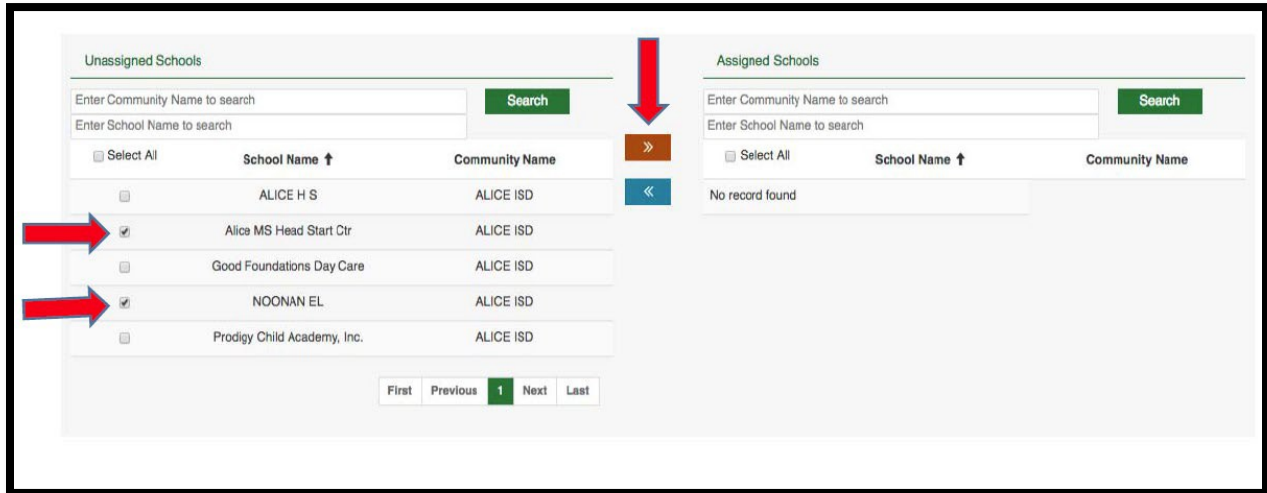
STEP 8: The selected schools now move from Unassigned Schools to Assigned Schools.
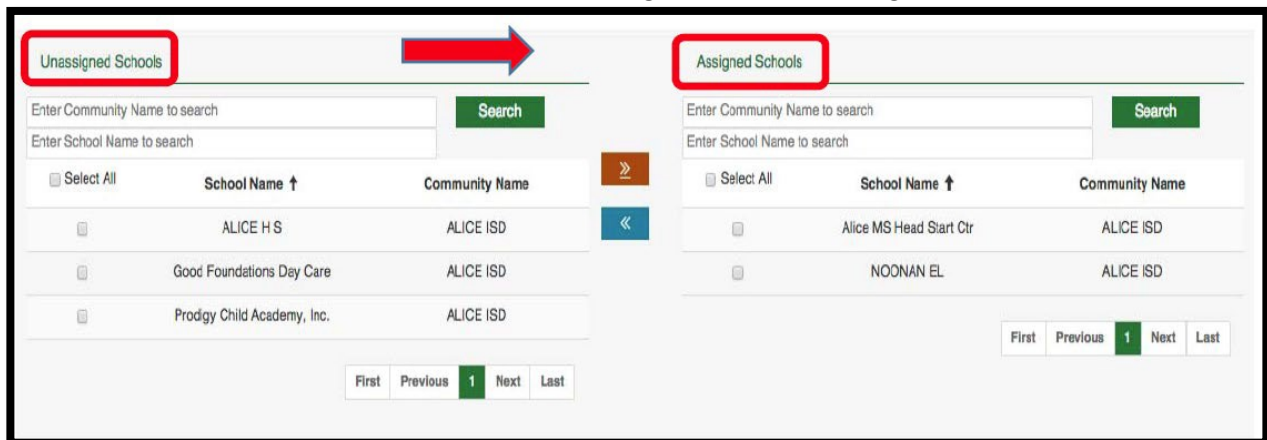
*The image below is an expanded view of Unassigned Schools.
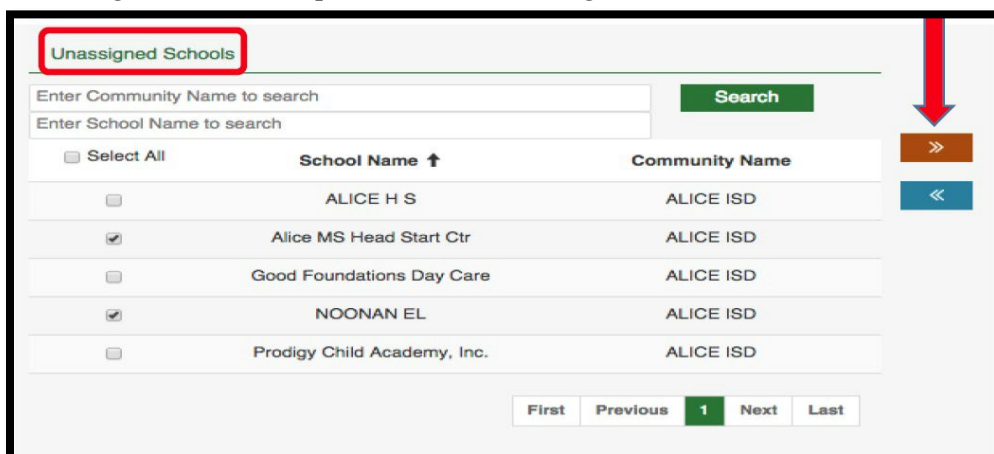
*The image below is an expanded view of Assigned Schools.
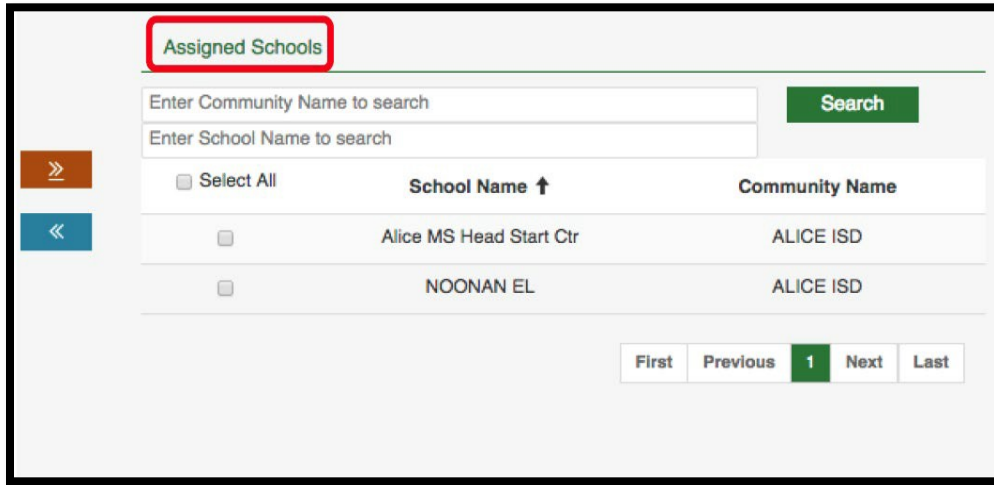
Note: You must repeat Steps 4–8 for **each** TRS assessor and mentor.

Assigning the Role of TRS Assessor for Each School

Now that you have granted access to each TRS assessor for all schools within your LWDB; the CDU and/or CDS can now assign the role of the TRS assessor to each school. Only the CDU or CDS user role can assign TRS assessors to a school.

Note: You must repeat the following steps for **each** TRS assessor so that each TRS assessor can start a TRS assessment.

STEP 1: Click on School Management and search for the schools to be assigned to **each** TRS assessor. Then click on the Edit button (the button with the pencil icon near the far right of the list).
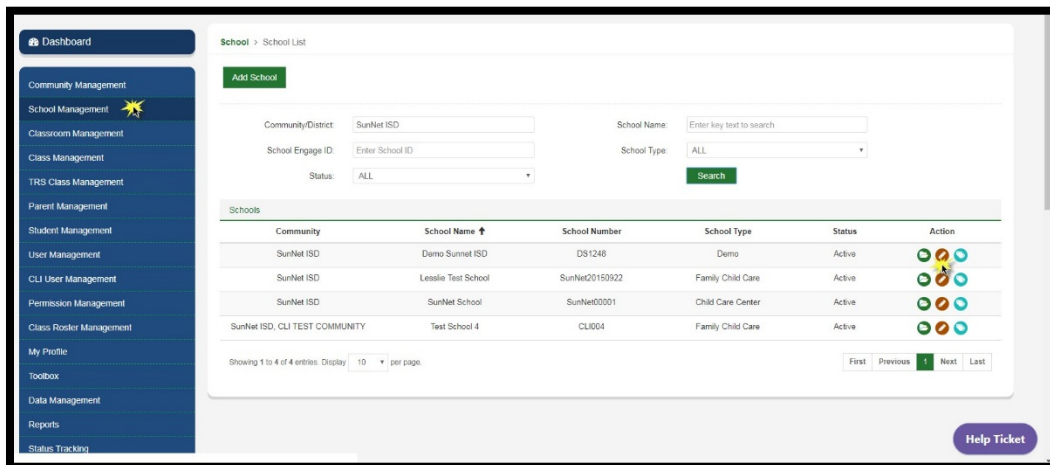
STEP 2: Go to the TRS Information section and click on the TRS assessor drop-down menu, selecting the assessor's name for School(s) and then click on Submit at the bottom of the page.
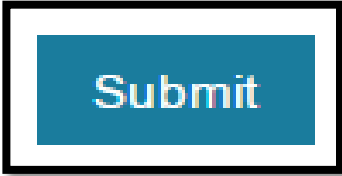
Assigning the Role of TRS Mentor for Each Class

TRS mentors can assign their role for each class in the schools in which they will serve as the TRS mentor.

STEP 1: Select the TRS Class Management tab and enter the name of the school.

STEP 2: Click on the Edit button (the button with the pencil icon at the far right of the list).

STEP 3: Go down to the TRS Class Mentor drop-down menu, select the TRS Class Mentor for each class, and click on Submit at the bottom of the page.

Note: Steps 1–3 must be completed for every class in the school.

Assigning More Than One TRS Assessor to a School

A different TRS assessor can be assigned to each class within a school. To do this, at least one TRS assessor must be assigned on My School for the specified facility and for **each** class. When there is more than one TRS assessor, each assessor must be assigned to each individual class that will be assessed.

Repeat the same steps stated above to add a TRS mentor to each class; however, select the TRS Class Mentor drop-down menu.

Note: The individual cannot be assigned as **both** the TRS assessor and TRS mentor for the same class. He or she must be in the role of **either** TRS assessor **or** TRS mentor for each class.

After the TRS Specialists have been added and assigned to the Program, the Specialists will begin to work with the Program to provide support and prepare them to apply for Texas Rising Star Certification. This process may include:

- Completion of the TRS Orientation (online via CLI Engage or by designated Board staff)
- Conducting of Needs Assessment
- Adding of teacher accounts via CLI Engage
- Developing of Continuous Quality Improvement Plan
- Support with guidance and next steps determined by the LWDB

All Community Users

Accepting an Invitation from Children's Learning Institute CLI Engage

This section provides instructions to TRS staff members on how to accept an invitation from CLI Engage platform and register their account. All TRS staff members are considered the community in this guide.

The prerequisites are as follows:
- The individual must have an active e-mail address.
- The individual should check spam or junk mail for an invitation from CLI Engage. (Note: The invitation expires 14 days after it is sent.)

STEP 1: Log in to your e-mail account (Google e-mail).
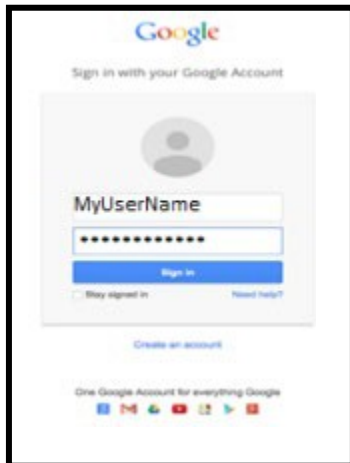
STEP 2: Click on the e-mail sent by CLI Engage.
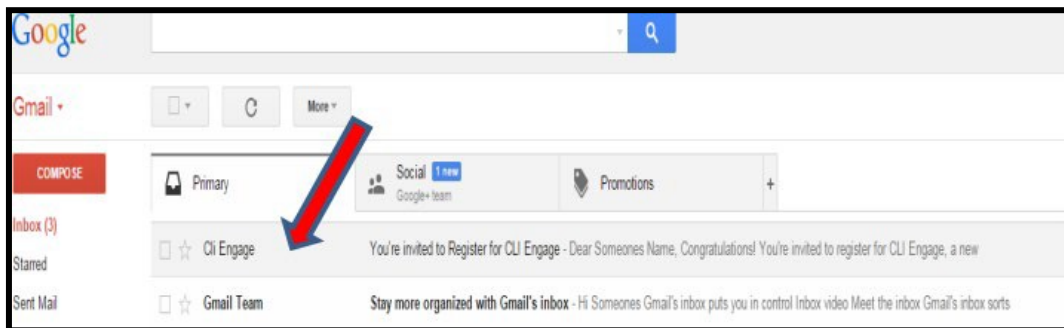
STEP 3: Click on "Click here" to accept the invitation from CLI Engage and complete the registration process.
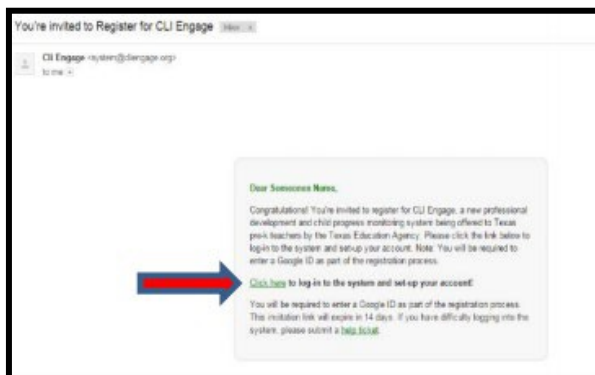
STEP 4: Log in to CLI Engage.org.

STEP 5: Click on the Sign In with your Google Account button.
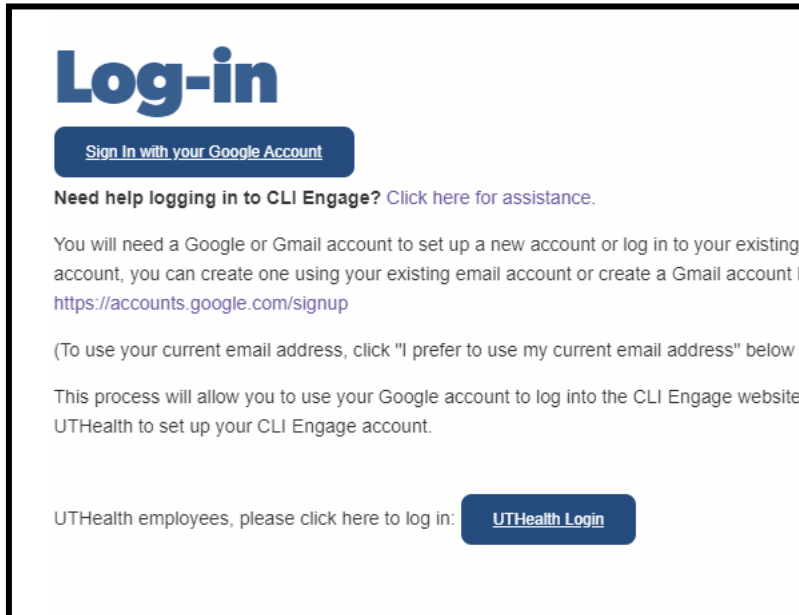
STEP 6: Log in to CLI Engage with your username and password.
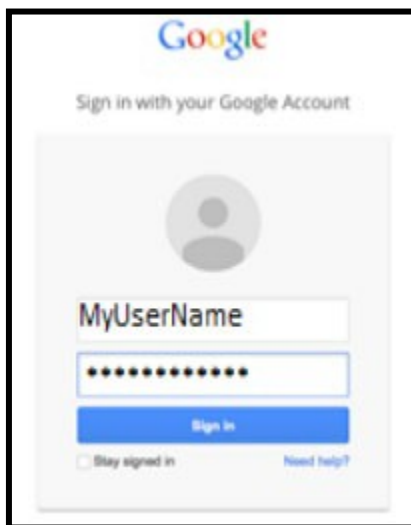
Two screens appear, asking for Request for Permission (For example, "UTHealth would like to:")
1) First screen: Click on Accept
2) Second screen: Click on Accept

STEP 7: The web page that appears is the main Dashboard page for CLI Engage. Go to the bottom of this page and click on the Class & Student Management button under the Administrative Tools section.

STEP 8: Click on My Profile and update your contact information. Fields with an asterisk (*) are required fields.
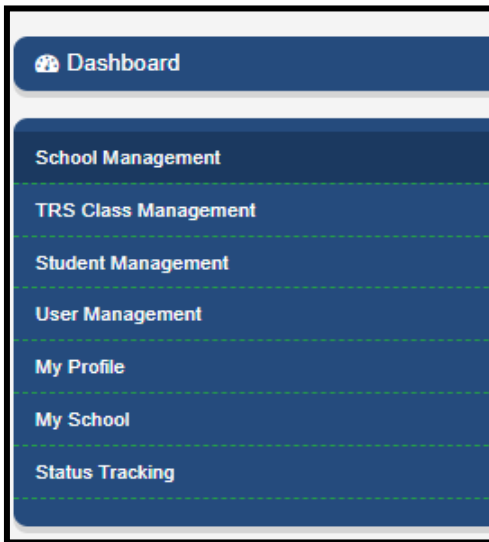
STEP 9: Click on My School to view the schools assigned within each LWDB.
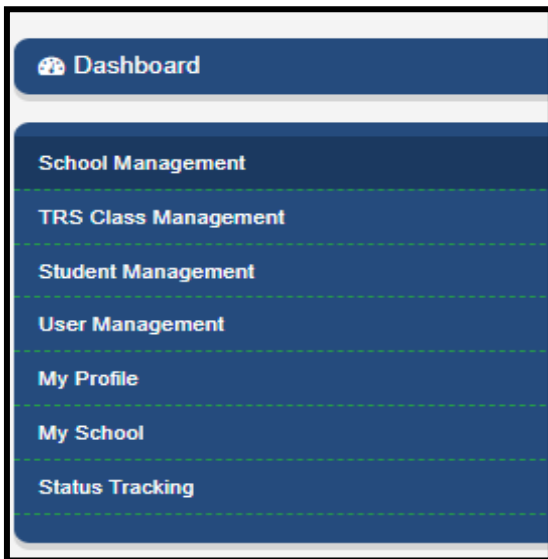
STEP 10: Click on Dashboard to return to the Welcome page.

Logging in to CLI Engage

This section provides information on accessing the login portals for CLI Engage. There are two ways to access CLI Engage.

Via the CLI home page:

STEP 1: Go to https://cliCLI Engage.org/.

STEP 2: Locate and click on the LOGIN button in the top-right corner of CLI's main page.

STEP 3: Click on the Sign in with your Google Account button.
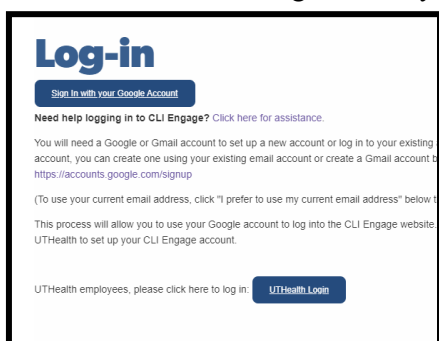
STEP 4: Enter the e-mail address and password for the CLI Engage account. If more than one account has been used on the computer, TRS staff might have to locate the account needed.

Via Texas Rising Star website:

STEP 1: Go to https://texasrisingstar.org/.

STEP 2: Click on the TRS STAFF LOGIN button in the top-right corner of the TRS main page.
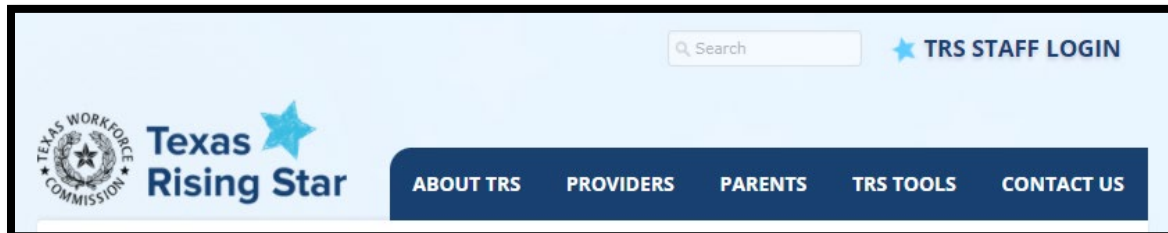
STEP 3: Click on the Sign in with your Google Account button.
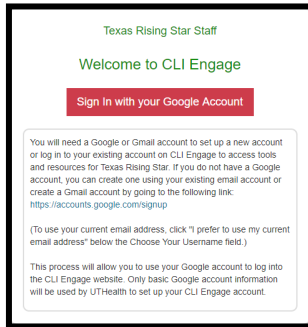
STEP 4: Enter the e-mail address and password for the CLI Engage account. If more than one account has been used on the computer, TRS staff might have to locate the account needed.

When the Program is Ready to Apply (*for the TRS Specialist*)

When the TRS Specialist has determined that the ELP is ready to apply for TRS Certification, the Program Director will upload the following documents to CLI Engage via the School Management tab for the TRS Specialist to review.

1. TRS Initial Screening Form
2. TRS Application
3. Facility Self-Assessment Record Form

STEP 1: Locate the School Management tab
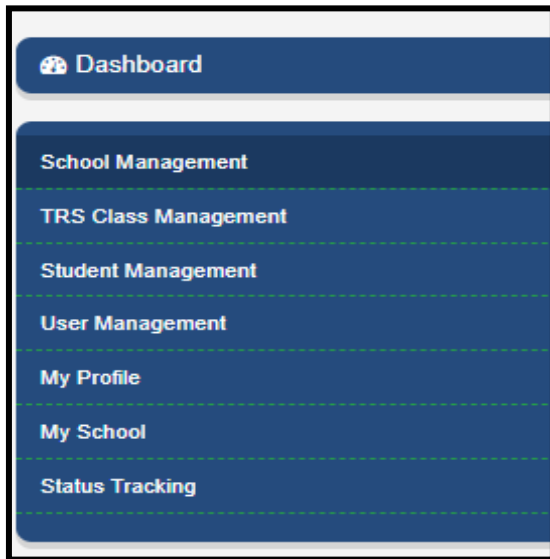
STEP 2a: Click on the Initial Deficiency Findings button to activate the importing of the deficiencies reported in the records from Child Care Regulation.
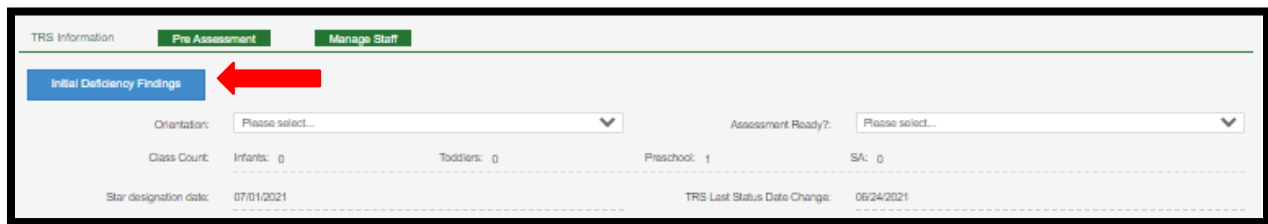
STEP 2b: Any deficiencies listed on the Child Care Regulation report will populate and appear in the deficiency findings section on the Pre-Assessment tab. *This information contributes to determining eligibility for participation in the Texas Rising Star certification program.*
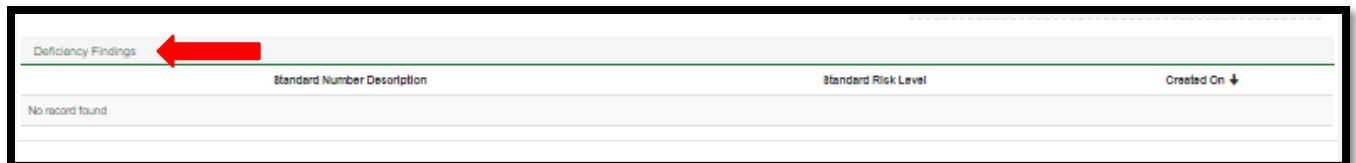
Section key*:*

Standard Number Description - lists the associated number of the deficiency and a short description.

Standard Risk Level - categorizes the level of the deficiency based on the pre-determined criteria (Critical, High, Medium, etc.).

Created on - the date the deficiency was cited.

STEP 3: Locate the Required section and click on the file names to review the documents submitted by the Program Director.
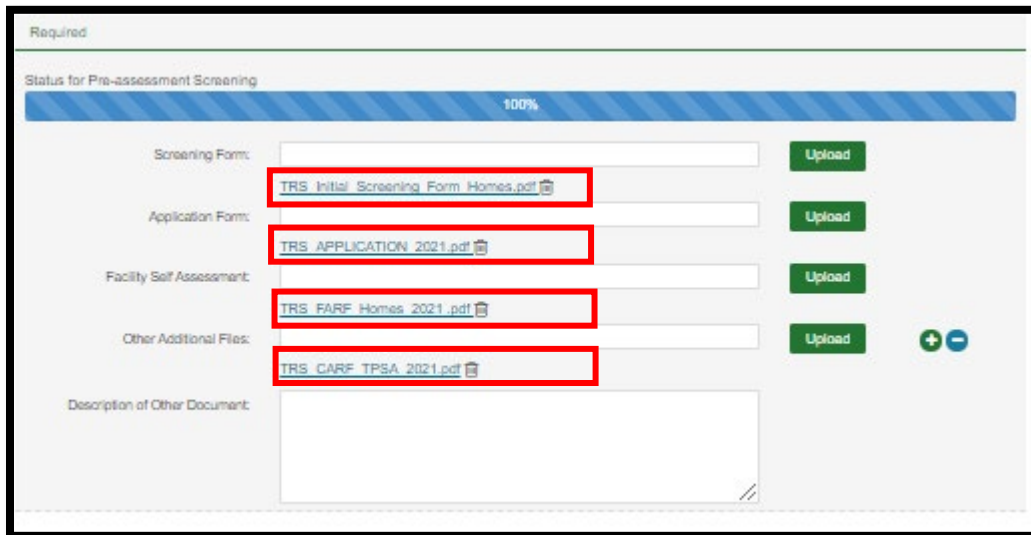
- Documents such as facility staff lists, handbooks, teacher files (for those that do not have a TWR account), and other program documents may be found under the *Other Additional Files* section along with a description of the documents in the *Description of other document* section.

STEP 4: Locate the *Ongoing* section to reference the TECPDS information associated with the Director and staff *(if Texas Workforce Registry accounts have been created).* The assessor will be able to download a copy of the Individual's Professional Development Profile Report in the Assessment section of the online tool (*detailed guidance is provided in the Assessment section of this guide*).
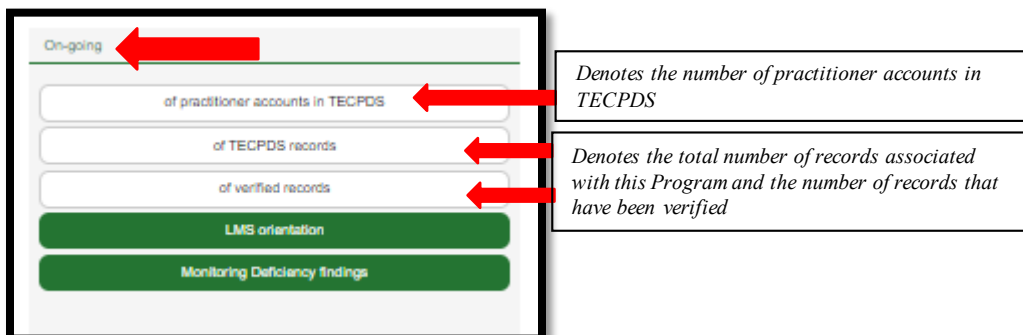
See TECPDS How-to Guides for guidance on how Directors and Staff create Texas Workforce Registry accounts if opt-in was not completed at initial CLI Engage account creation. *https://tecpds.org/wp/help/how-to-guides/*

Once the TRS Specialist has reviewed all the required documentation and made a determination of the Program's eligibility to participate (including completion of the TRS orientation), the Program's status will be noted in the designated sections under the *Pre-Assessment* tab.

STEP 5a: Click the drop-down arrow on Orientation and select Yes or No denoting whether or not the orientation has been completed via CLI Engage or the LWDB.

STEP 5b: Click the drop-down arrow on Assessment Ready to denote whether the Program is Ready for assessment, Not Ready or Not Ready and assigned to a Mentor.
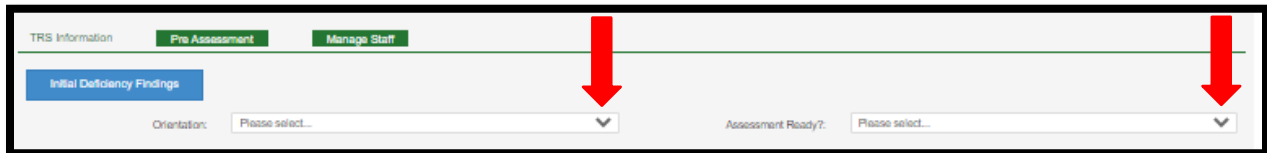
Section Key:

Assessment ready is assigned to programs who have met all eligibility requirements and are ready for the assessor to schedule an onsite Assessment.

Not Ready is assigned to programs who the TRS Specialist has determined that they do not meet the eligibility requirements for assessment at this time.

Not Ready assigned to Mentor is assigned to programs that are Not Ready for assessment and have been assigned to a Mentor.
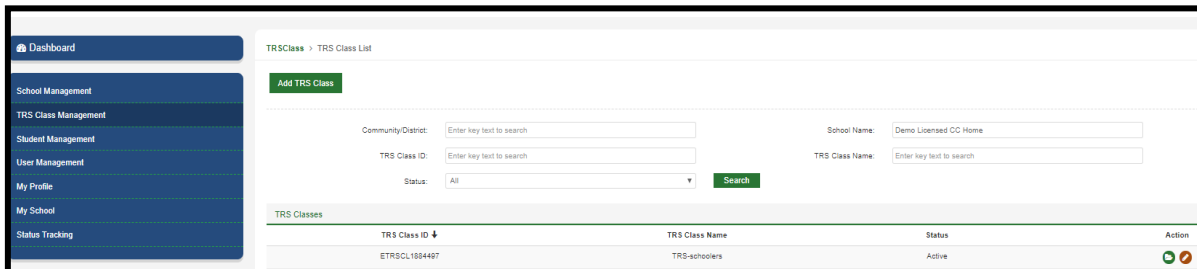
Adding TRS Classes

This section provides instructions to TRS staff on creating TRS classrooms.

TRS staff denotes each class that can be assessed and/or observed within each facility. There are two ways to access these classes and make additions. Step 1 describes both ways to access the applicable screen needed.

STEP 1:

A. On the CLI Engage Dashboard, go to the bottom of the page, then click on Class & Student Management under the Administrative Tools section. On the TRS Class Management tab, click on the Add TRS Class button.

B. On the CLI Engage Dashboard, go to the TRS Assessment Tool button, and within the Facilities Listing page, click on the button with the bell icon to Edit Classes, then click on the Add TRS Class button.

STEP 2: Fill in all Required Information, which is indicated with an asterisk.

- The Community/District is the LWDB with which the facility is associated. Enter the name of LWDB. and/or the number associated with the LWDB. Example: Panhandle—Enter "Panhandle" or "WDB 01."
- School Name will be the name of the Facility for this classroom location. As you begin to enter the name, the software will search automatically for the name. Choose the applicable facility or school.

o TRS Class Name and the age group of the class (example: Toddler B Class).

o If the Classroom age group changes, TRS staff updates this within the TRS Class Management tab. See the Updating Classroom Information section.

- Class Status defaults to Active. If this classroom closes, TRS staff can update its status by changing the status to Inactive. See the Updating Classroom Information section for this.
- TRS Class Assessor is chosen via the drop box. If TRS staff assigned is not listed, see the Add TRS Specialist Role section about adding TRS staff.

Although the system does not require the Adding TRS Classes section, it is advisable to complete this section to ensure that the applicable measures for assessing are populated in the online scoring tool.

- Select the age group of children for the TRS Class as follows: (Multiple ages may be selected if the classroom is for a mixed-age group.)
  o Choose Infants, Toddler, Preschool, or School Age.
  o Include the total number of children in each class.
  o Include the number of teachers.

- Class Notes consist of information that TRS staff deems relevant to the classroom to help ensure the accuracy of scoring tools and measures.

- Curriculum designations can be made by clicking on the related drop-down boxes and selecting the core curriculum and the supplemental curriculum (if applicable) that is used by the Program for each of the classes associated with that program.

Click on Submit when completed. A pop-up box lets you know that the updates have been saved.

Basic Information

Com munity/District   TRS TM1ing Community   School Name   TRS Automation School

TR S- TRS Automation   Pre sc hool   1420
                                              Can   Engag e ID   ETRSCL20 7A 1 1

                                              Homeroom   Tel cher   Rey Guajardo

Core curriculum   used   Supplemental curriculum used

Age of Children   Number of Caregiv ers

D Infants 0- 17 mos.
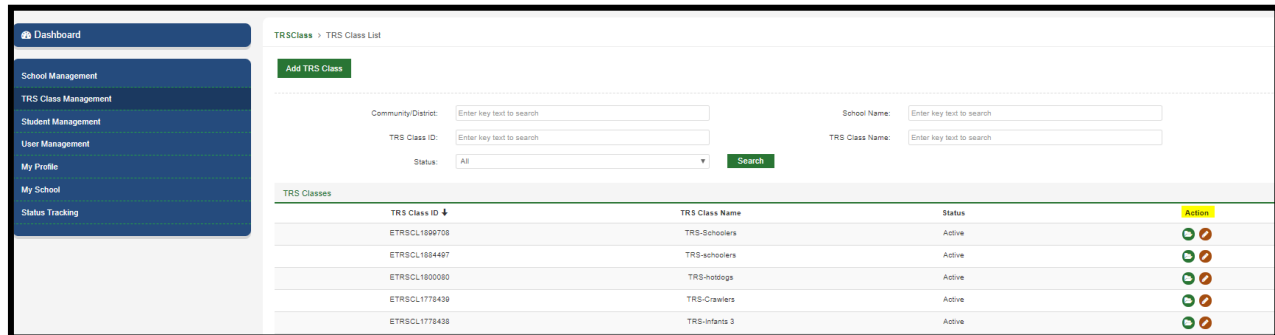
O Toddler   18-3S   m os

☑ Pre School 3-5 yrs old

0 SshoolA11cS-12old

Updating Classroom Information

STEP 1: Within the TRS Class Management tab, find the TRS class to be updated, and click on the Edit button (the button with the pencil icon, on the far right of the class list).

STEP 2: Make the edits needed and click on Submit at the bottom to save. Examples of edits are the Class Name, Class Status, Age of Children, Number of Children, and Number of Teachers.

Note: This process can be used with schools by using the School Management tab, finding the school with information to be updated, and clicking on the button with the pencil icon button to edit.

Ensure that either the mentor or the assessor has selected, at minimum, the applicable "Core Curriculum used" for each classroom.

STEP 3: Click on Submit when completed. A pop-up box lets you know that the updates have been saved.

Texas Rising Star Assessments and Visits
Determining the Type of TRS Assessment

Before entering scores into CLI Engage, the assessor must choose the type of assessment that will be entered. It is imperative that the assessor choose the appropriate type of TRS assessment for the ELP. Each type of assessment requires specific data entry to ensure the consistency and reliability of the data. Follow the instructions in this guide for each type of assessment.

Initial assessment—This type of assessment is for ELPs that are pursuing TRS for the first time. This is a new, full, on-site assessment of all TRS measures for all TRS classes. The star level is calculated by CLI Engage. This assessment is used also for previous TRS ELPs that lost certification and are reapplying.

Note: Department of Defense (DoD) military facilities will not receive an initial assessment and assessors will instead use the instructions in the Event Log under Auto Assign to automatically assign a 4-Star certification and generate applicable reports.

Annual monitoring visit—This type of assessment is for the annual unannounced on-site visit that occurs on or before the anniversary certification date. Use the instructions in this guide for this type of visit. The star level is calculated by CLI Engage; the verified star is not edited and typically does not change. If the school has applicable CCR Screening Form consequences, the TRS assessor will use the instructions in the Event Log under Star Level Change to create an Event Log to document the lower star level.

Category reassessment—This type of assessment is for an ELP that has requested a reassessment of not more than two of the facility's lowest-scoring categories within 30 days after a full assessment. A category reassessment includes Category 1 if the school's director or staff has changed within the previous three months. This reassessment allows the assessor to keep the previous category-level star scores for the categories that are not being reassessed; the newly calculated star will combine the previous assessment and the current assessment, and the TRS assessor can edit the verified star if necessary (based on CCR screening impacts). Use the instructions in this guide for this type of assessment. If the school has applicable CCR Screening Form consequences, the TRS assessor can edit the verified star.

Note: For the TRS categories that are **not** being reassessed, mark N/A at the category level. The Recertification By date will **not** be reset.

Reconsideration—This type of assessment is conducted when a facility has requested a **reconsideration**. This can be an entire category, subcategories, or individual measures. This assessment allows the assessor to retain the category-level star scores from the previous assessment while excluding those measures that will not be scored. Use the instructions in this guide for this type of assessment or visit. The calculated star will combine the previous assessment and the current assessment, and the verified star is editable by the TRS assessor. If the school has applicable CCR Screening Form consequences, the TRS assessor can edit the verified star.

Note: Mark N/A on all categories and/or classrooms not observed. Additionally, enter the following comment at the category level: "Classroom not assessed during reconsideration visit." The Recertification By date will **not** be reset unless the whole assessment is being reconsidered.

Recertification assessments—This type of assessment is for current TRS facilities that are applying for recertification in the TRS certification system. The star level is calculated by CLI Engage, and, if CCR deficiencies exist, the TRS assessor can edit the verified star. The data entry process for this visit is the same as the data entry process for the Initial Certification assessment. Note: The Recertification By date will be reset to three years from the approval date of this assessment.

Star level evaluation—This type of assessment is for a facility that has made significant improvements across TRS measures that could result in a higher star-level designation upon reassessment. This is a full on-site assessment of all TRS measures and for all TRS classes. This assessment can be done at any time within the three-year certification time frame. The star level is calculated by CLI Engage, and, if CCR deficiencies exist, the TRS assessor can edit the verified star. The data entry process for this visit is the same as the data entry process for the Initial Certification assessment and the Recertification assessment.

Note: The Recertification By date will be reset to three years from the approval date of this star-level evaluation.

Facility changes (expansions, moves, splits, or change in type or ownership)—This type of assessment is for visits conducted because of a change to the facility including an expansion, move, split, or a change in the type or ownership of the facility. See the TRS Guidelines for explanations on each type of these situations and what categories are assessed. The star level is calculated by CLI Engage, and, if CCR deficiencies exist, the TRS assessor can edit the verified star.

Note: The Recertification By date may be reset to three years from the approval date of this facility change assessment if a full assessment is conducted. If a partial assessment is conducted, based on the Facility Change Rubric within the Guidelines, then

the current certification cycle remains.

SIA assessment—This type of assessment is designed to assess a facility after being placed on an SIA. This assessment allows the category-level star scores that are not being assessed to be retained from the previous assessment. The calculated star will combine the previous assessment and the current assessment, and, if CCR deficiencies exist, the TRS assessor can edit the verified star.

Note: For the TRS categories that are **not** being monitored, mark N/A at the category level. The Recertification By date will **not** be reset, unless all categories were assessed during this assessment.

Entering Assessment Scores

This section provides instructions on how to enter scores using the TRS online assessment tool for the following types of program assessments or visits:
- Initial certification
- Annual monitoring visit
- Recertification assessment
- Category reassessment
- Reconsideration
- Star level evaluation
- Facility-changes assessment (changes such as type of facility, ownership, expansions, splits, or moves)
- Service Improvement Agreement (SIA) assessment

Prerequisites for entering scores are as follows:
- A Google account for TRS Specialists Role (TRS assessor) must be in Active status.
- The schools must be in Active status.
- The TRS assessor must be granted access to the school, and his or her role must be assigned on the School Management Page.
- TRS Classes must have been created.
- Facility & Classroom Assessment Record Form(s) must be completed.

Note: It is not necessary to invalidate records to make changes to a TRS ELP's star level that are due to CCR deficiencies.

STEP 1: Log in to CLI Engage.

STEP 2: In the Dashboard, go to the section marked **Texas Rising Star**, then click on **TRS Assessment Tool 2.0**.
Note: Before placing any assessments into CLI Engage, the school must be Active, the TRS classes should be Active, and the correct facility type must be selected for all applicable assessment measures to appear.
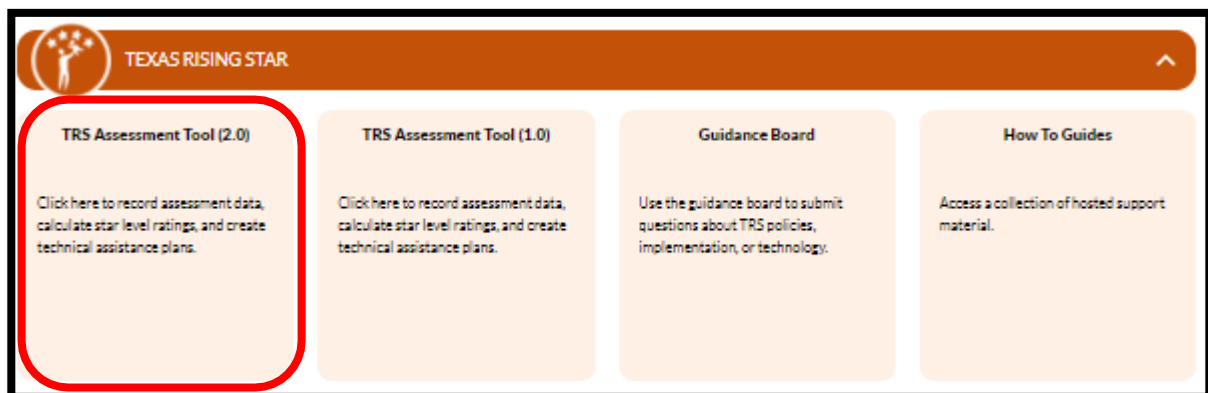
STEP 3: Search for and select the school that was assessed and for which you are entering scores. The ELP can be found by searching the LWDB data field and/or the School (Facility/Operator) data field. Begin to type in the name of the school and then select the applicable school when it appears in the drop-down menu, or click on Search.
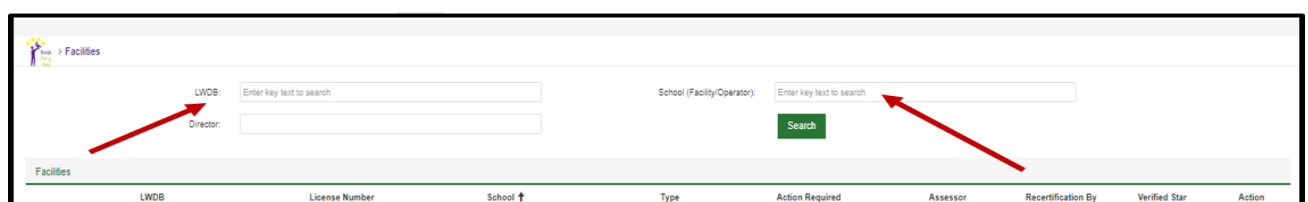
STEP 4: From the Facilities tab, review the school's information to ensure that all fields are accurate. If changes are required, click on Edit School button. Review the TRS class information to ensure that all fields are accurate (class name, age group of children, and number of children). If changes are required, click on the bell icon button at the right to edit the TRS Class.

Note: Be sure to click on Submit when edits are made.

STEP 5: Ensure that the Facility Type is accurate for the facility being assessed. If changes are required, click on the Edit School button and make the adjustments as needed. Save and return to the Dashboard for Facilities.
Note: Facility types are as follows: LCAA—Licensed Childcare All Ages (birth–12 years), LCSA—Licensed Center School Age (school-age children only), LCCH—Licensed Childcare Homes, RCCH—Registered Childcare Homes

STEP 6: Once all information is verified, click on the **Action** button (play button) to begin the assessment.

STEP 7a: Click on the *Create TECPDS Report* button to generate the Individual Professional Development Reports that are associated with this Program.

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STEP 7b: Click on the Event Log Tab and locate the TECPDS Report entry and download a copy of the Individual Professional Development Reports that are associated with this Program. The assessor will use this report to score Category 1-Director and Staff Qualifications and Training measures.
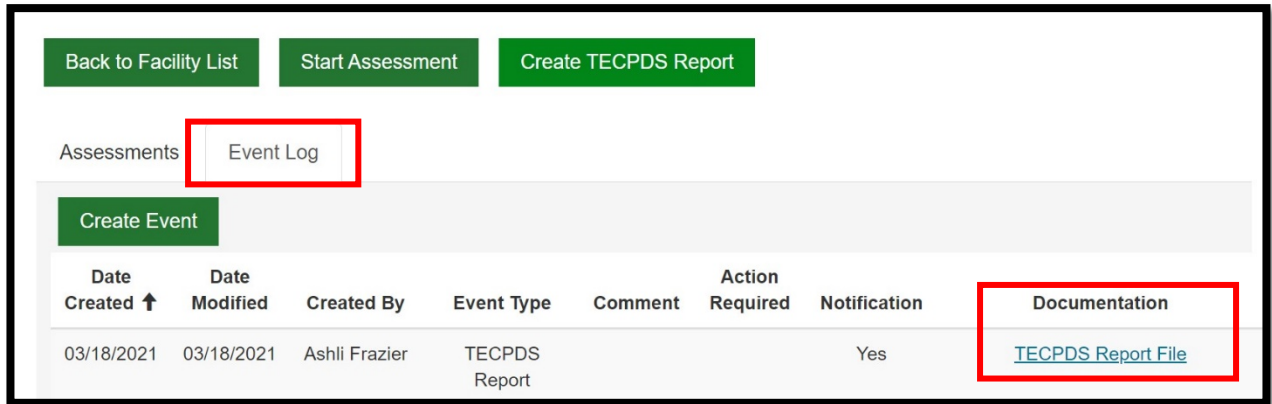
STEP 8: Click on the Start Assessment button.
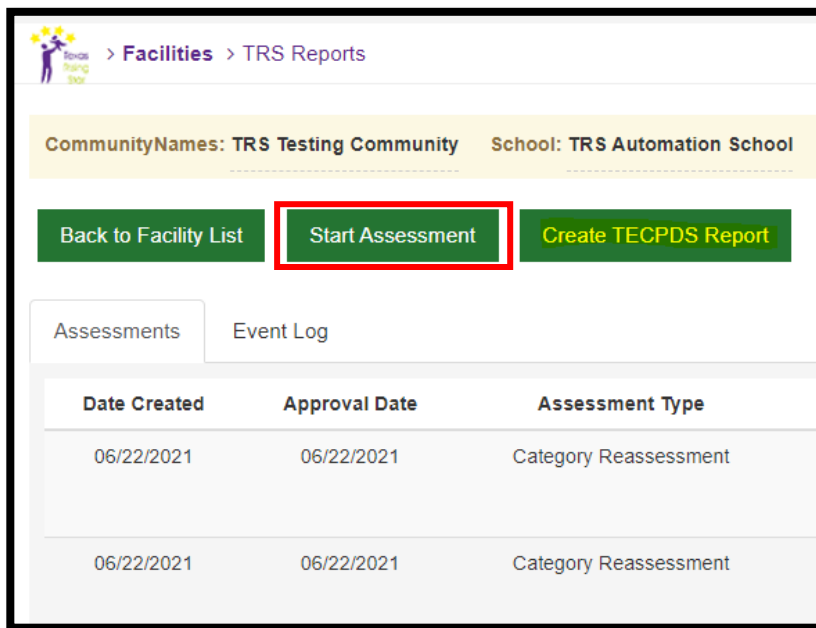
STEP 9: Enter dates.

    Visit Date: Enter the date on which the assessment was completed.
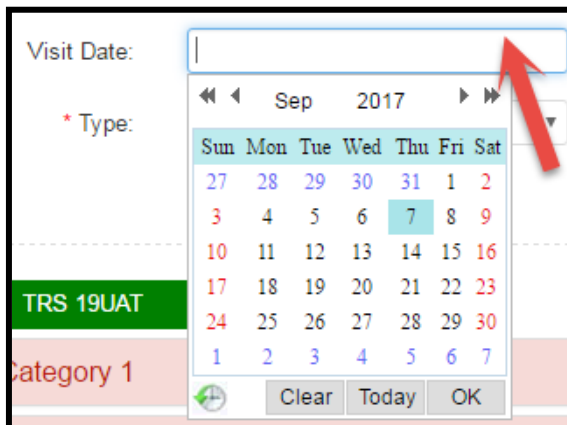
Discuss Date: This is the date on which the assessor plans to discuss the results with the ELP administrators.
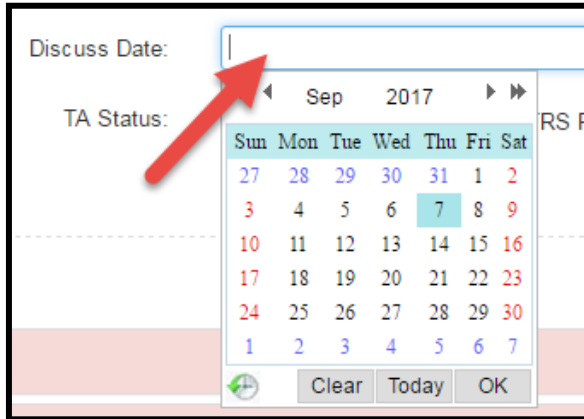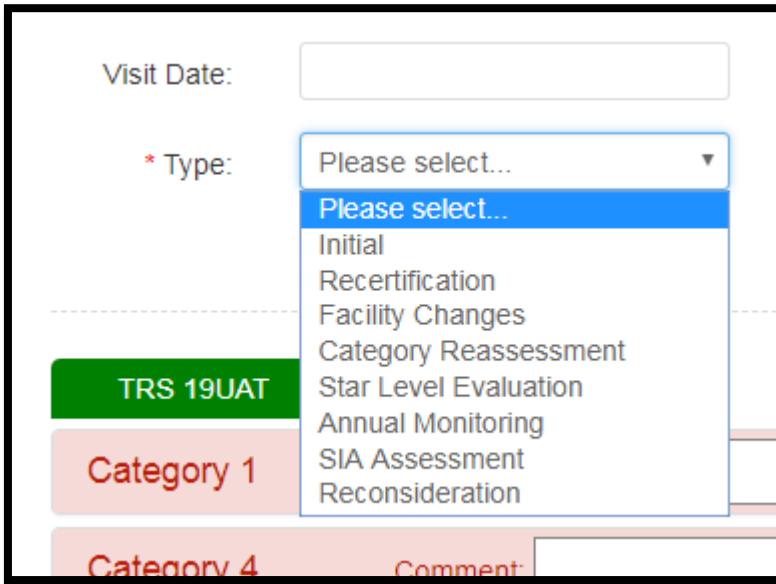
Approval Date: This is the date on which the star level is effective. It will also be the **effective start date** on the Official TRS Assessment Results Report. Typically, this is the first of the month following the assessment. To choose the date, enter the date manually or use the date picker. Place the arrow inside the bar so that the date picker will appear. Select the month, date, and year by using the arrows at the top of the date picker.
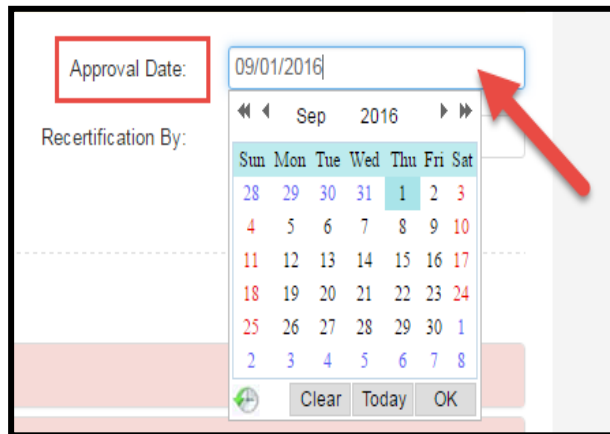
Recertification By: This is the **effective end date** on the Official TRS Assessment Results Report. The TRS assessor must ensure that this date accurately reflects the current TRS recertification cycle. Remember that this is the time frame in which the TRS ELP must renew its TRS certification. Choose the date by using the date picker, or enter the date by hand. Place the arrow inside the bar so that the date picker appears. Select the month, date, and year by using the arrows at the top of the date picker.
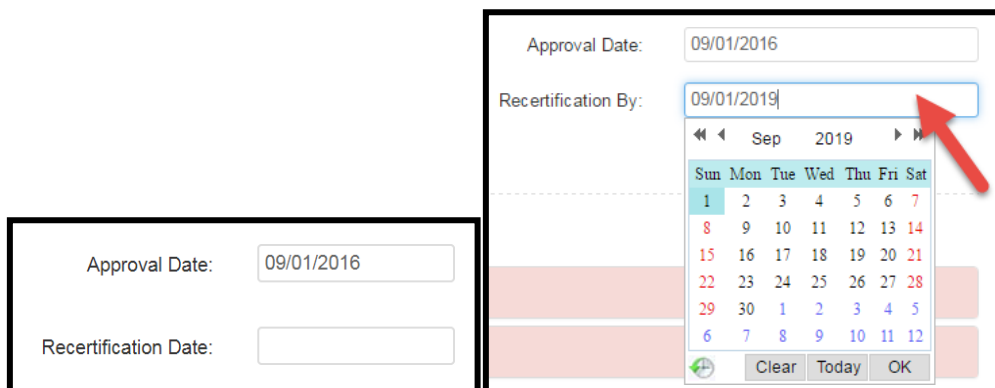
STEP 10: Select the type of assessment. Click on the drop-down menu to display the types of assessments. (See below for definitions of types of assessments.)

Entering Scores for a Full Assessment

Initial, Star Level Evaluation, Recertification, and Facility Changes Assessments

Complete Steps 1–10 above for Entering Assessments.

For any full assessment, the Approval Date is the date on which the star level is effective and should be the first of the month following the visit. The Recertification By date is the effective end date and reflects the full three-year TRS recertification cycle.

STEP 11: Enter all scores for all measures that were assessed by choosing the radio button for the applicable score. Note that N/A for a measure score is to be given only if that classroom and/or facility meets the requirements for scoring the measure N/A.

- Enter Category 1 and Category 3 using the Facility Assessment Record Form (FARF)
- Enter Category 2 and Category 4 using the Classroom Assessment Record Form (CARF)

Note: After each section has been completed, the category bar turns from red to green. When scoring P-GSSR-01 and P-GSSR-02, the assessor inputs data related to the selected age group, group size, and number of teachers. CLI Engage autoscores the measure once data entry is complete.

To open a category or classroom, click on its tab. After all measures are scored, the category "collapses" and turns green. To edit a score before it is finalized, open the applicable tab and make the edit. Enter comments about scoring within the comment boxes for each applicable category. Ensure that comments are objective and explain why a category and/or measure was scored low or high. Include other observations that require technical assistance.

STEP 12: After all scores have been entered:
- click on Save; and
- click on Preview to view the facility scores and assessment results, and to check all information entered.

STEP 13: Select TA Status, if applicable. TA Plan is denoted when the facility has requested assistance, or the facility has received a lowered category star level but not a lowered overall star level. SIA is denoted when the facility has received a lowered overall star level during an annual monitoring visit. TRS Probation is denoted when the facility has received a screening impact of probation (or is currently on TRS probation) at the time of the visit. N/A is denoted when none of these is applicable.

STEP 14: Confirm report and click on Finalize.

STEP 14: Verify the star level and click on the Submit button. Ensure that the approval and recertification dates are accurate. Reports are generated after the information is submitted.

Full Assessments for Nationally Accredited Schools (Modified)

Note: before entering scores for Nationally Accredited Program, check the school management page to ensure that the Program Accreditation designation has been assigned.

Complete Steps 1–10 above for Entering Assessments.

All steps for entering scores for a full assessment are followed as stated in the previous section—Entering Scores for a Full Assessment—for schools that do not have national accreditation. However, nationally accredited schools, which receive modified full assessments, are assessed with a modification to Step 11.

STEP 11 (modified): Enter all scores for all measures being assessed by choosing the radio button for the applicable score. Enter N/A for a measure score only if that classroom and/or facility meets the requirements for being scored N/A on that measure.

- Enter Category 2 and Category 4 using the CARF

Note: After each section has been completed, the category bar turns from red to green. When scoring P-GSSR-01 and P-GSSR-02, the assessor enters information about the selected age group, group size, and number of teachers. CLI Engage scores the measure once this information is complete.

Categories 1 and 3 will appear green signifying that the categories were assigned a scoring based on the program having the national accreditation designation. Enter "program is nationally accredited" in the category comment field.

To open a category or classroom, click on its tab. Once all measures are scored, the category "collapses" and turns green. To edit a score before it is finalized, open the applicable tab and make the edit. Place comments about scoring within the comment boxes for each applicable category. Ensure that comments are objective and explain why a category and/or measure was scored low or high. Include information about issues that require technical assistance.

Note: If the facility has lost national accreditation during its three-year TRS certification, the assessor follows the steps as described for the applicable assessment of a facility that is not nationally accredited.

Entering Scores for Category Reassessment or SIA Assessment

Complete Steps 1–10 above for Entering Assessments.

For category reassessment and SIA assessment, the **Approval Date** is the date on which the star level is effective and should be the first of the following month. The **Recertification By** date is the current effective end date that reflects the facility's current TRS recertification cycle.

Example: If the current TRS cycle is September 1, 2017, through August 31, 2020, and a category reassessment is done and effective January 1, 2018, the Recertification By date remains August 31, 2020.

STEP 11: Enter all scores for all measures assessed within the categories receiving the assessment by choosing the radio button for the applicable score. Note that N/A for a measure score is given only if that classroom and/or facility meets the requirements for scoring the measure N/A.
- Enter Category 1 and Category 3 using the FARF
- Enter Category 2, Category 3, and Category 4 using the CARF

Note: After each section has been completed, the category bar turns from red to green. When scoring P-GSSR-01 and P-GSSR-02, the assessor enters information about the selected age group, group size, and number of teachers. CLI Engage scores the measure once this information is complete.

The assessor enters N/A for the categories **not** being assessed. For those categories, enter a comment indicating that the category was not observed because of the category reassessment or SIA assessment.

To open a category or classroom, click on its tab. Once all measures are scored, the category will "collapse" and turn green. Edits to scores can be made before finalizing by opening the applicable tab and making the edit. Enter comments about scoring in the comment boxes for each applicable category. Ensure that comments are objective and explain why a category and/or measure was scored low or high. Include other observations that require technical assistance.

STEP 12: After all scores have been entered:
- Click on Save; and
- Click on Preview to view the facility scores and assessment results, and to check all information entered.

STEP 13: Select TA Status, if applicable. TA Plan is denoted when the facility has requested assistance, or the facility has received a lowered category star level but not a lowered overall star level. SIA is denoted when the facility has received a lowered overall star level. TRS Probation is denoted when the facility has received 10–14 CCR deficiencies (or is currently on TRS probation) at the time of the visit. N/A is denoted when none of these is applicable.

Note: See TRS Guidelines, Section 4, for more information.

STEP 14: Confirm the report and click on Finalize. Check that the Approval and Recertification By dates are accurate.

STEP 15: Once Finalize is selected, a Retain Star pop-up box will appear. For the categories that were not reassessed, choose Retain Previous Rating (click on the box in each category column along the Retain Previous Rating row), then click on the Combine Calculation button.

STEP 16: Verify the star level and click on Submit. Check that the Approval Date and the Recertification Date are accurate. Reports are generated after information is submitted.

STEP 17: Place an Event in the Event Log per the instructions for a Category Reassessment or SIA Assessment.

Entering Scores for a Reconsideration

Complete Steps 1–10 above for Entering Assessments.

For a Reconsideration of a measure or category, the **Approval Date** is the date that the star level is effective and should be the first of the following month. The **Recertification By** date is the **current** effective end date; it reflects the facility's current TRS recertification cycle.

Example: If the current TRS cycle is September 2018 through August 2021 and a Reconsideration is done and effective October 1, 2018, the Recertification By date remains August 2021.

For a Reconsideration of the whole assessment, the **Approval Date** is the date that the star level is effective and should be the first of the following month. The **Recertification By** date is the effective end date that reflects the full TRS recertification cycle.

For a reconsideration of a measure

STEP 11: Choose the assessment that is being reconsidered and click on the Invalidate button.
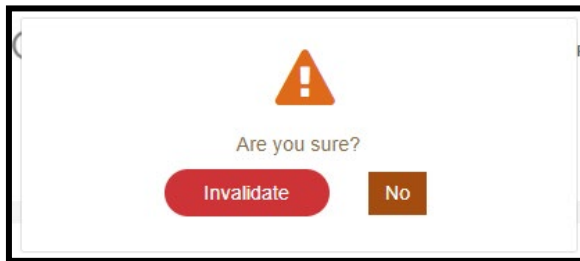
STEP 12: Within the assessment, choose the measures that are being reconsidered and update with new scoring. For each applicable change, enter comments about scoring in the comment boxes. Ensure that comments are objective and explain why a category and/or measure was scored low or high. Include other observations that require technical assistance.

STEP 13: After all scores have been entered:
- click on Save; and
- click on Preview to view the facility scores and assessment results, and to check all information.

STEP 14: Select TA Status, if applicable. TA Plan is denoted when the facility has requested assistance or when the facility has received a lowered category star level but not a lowered overall star level. SIA is denoted when the facility has received a lowered overall star level. TRS Probation is denoted when the facility has received 10–14 CCR deficiencies (or is currently on TRS probation) at the time of the visit. N/A is denoted when none of these is applicable.

STEP 15: Confirm the report and click on Finalize. Check that the Approval and Recertification By dates are accurate.

STEP 17: Place a Reconsideration Event in the Event Log per the instructions for a Reconsideration.

Reconsideration of a Category
The assessor follows the instructions for a category reassessment or SIA Assessment, **choosing Reconsideration as the assessment type**. Additionally, the assessor places an event in the Event Log per the instructions for a Reconsideration.

Reconsideration of a Whole Assessment
The assessor follows the instructions for a Full Assessment, **choosing Reconsideration as the assessment type**. Additionally, the assessor places an event in the Event Log per the instructions for a Reconsideration.

Annual Monitoring Visits

This section provides instructions to TRS assessors on the protocol for annual monitoring visits for TRS-certified schools, including nationally accredited programs. The section also contains additional information for the TRS Online Assessment Tool on CLI Engage.

Initial procedures are as follows:
- Download the most recent TRS Provider Assessment Result Report from CLI Engage.
- Make copies of the CARF for the classes you will observe and review.
- Make a copy of the FARF.

Table 2. Preparing for the Visit

Task	Action
Do you have a copy of the TRS Facility's latest TRS Assessment Results Report from CLI Engage?	Yes No—Download a copy from CLI Engage.
Do you have the TRS Director/Staff Education Worksheet completed?	Yes No—Complete the Staff Education & Experience worksheet using the information obtained at the most recent assessment. This form will be compared to the current program roster to see which staff members have been retained and allow for input and scoring of new staff members' information.
Do you know the TRS Facility's Verified Star Level?	Yes No—Find the TRS Assessment Results Report to identify the verified star level. It might be helpful to record the category star level. These star levels can be used when comparing the report to the results from the annual monitoring. Keep this copy to review against the score after the annual monitoring. The review is helpful to the TRS mentor in developing a TA Plan or an SIA.
Do you know the number of classes by age group that will be observed?	Yes No—Observe 50 percent of the classrooms, including one from each age group, represented in the TRS Facility.
What forms are needed for the classroom assessment?	Make copies of the CARF for Infant, Toddler, Preschool, and/or School Age classroom assessments. Take extra copies if needed.
What forms are needed for the facility assessment?	Make a copy of the FARF for each facility assessment. Verify current scoring of staff, program management and family education/involvement measures.
Complete a TRS Screening Form.	Review the facility's licensing history on the monitoring deficiencies tab and complete the applicable screening form.
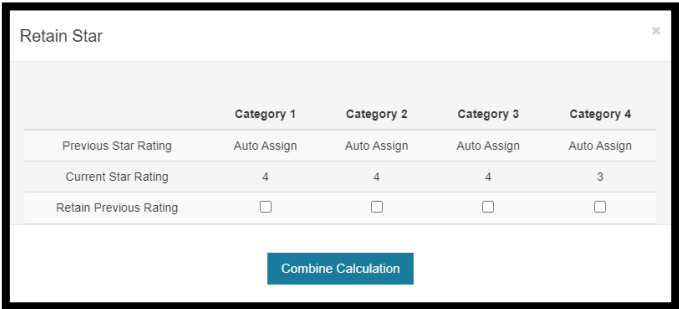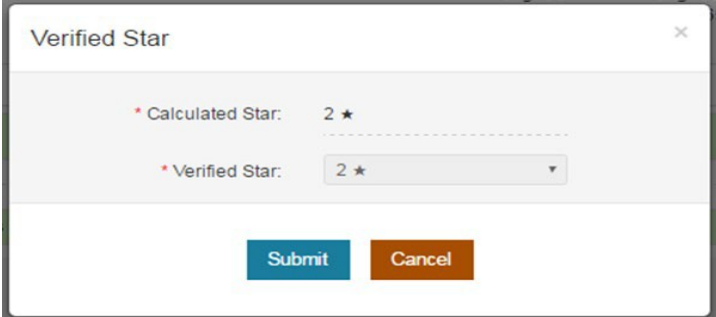
Table 3. Conducting the Unannounced Annual Monitoring Visit
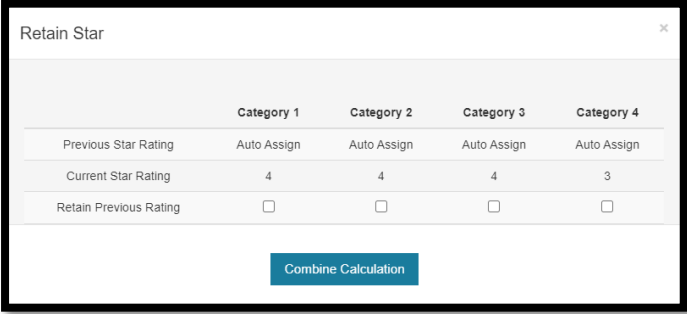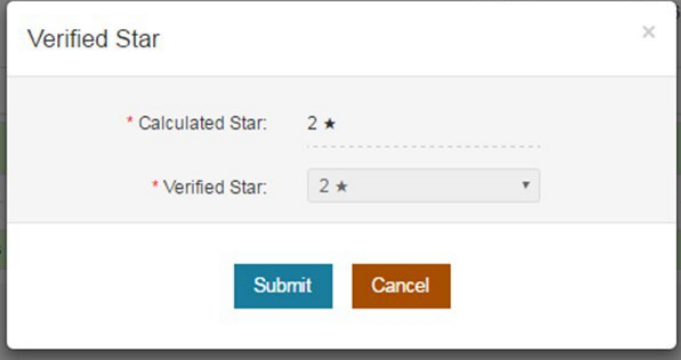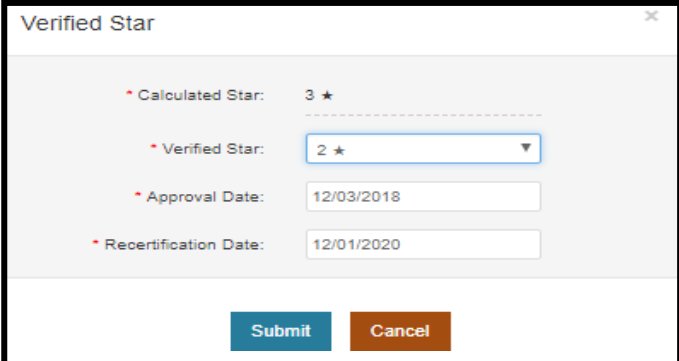
You must observe **50 percent of classrooms**, including **one from each age group**. Priority is given to **new classes and/or teachers** added since the previous assessment.

Task	Action
Facility—Ask the facility if changes have been made to policies and procedures regarding Category 3: Program Administration.	Yes—Review documentation and score applicable measures accordingly. No—Category 3 for the Facility section can be marked N/A; the Retain Star Level will be used for Category 3.
Are there new classes or teachers?	Yes—Priority should be given to these groups. No—Proceed with monitoring 50 percent of the classrooms, including one from each age group, for Categories 2, 3, and 4. The teachers that are **not observed** in the classroom will have their training hours **reviewed**. If all the **teachers were observed**, then all the training hours will be **reviewed**. Additionally, training hours and qualifications are reviewed for new teachers. Example: A site has one infant room, one toddler room, and one preschool room. Therefore, all three rooms would be observed. All teachers' training would be reviewed.
Facility—Ask the director whether changes in staff and/or director have occurred since the most recent assessment. Note: Assessors should notify the facility of what scoring is being done for Category 1—carry over (retain) or update—dependent on facility's situation (change in staff or not). New staff—Review and score all measures. Current staff— Review training hours.	Yes, there have been changes in staff: If the director has changed, the assessor scores all applicable measures with new director qualifications and training information. If staff has changed, the assessor scores all applicable measures with new staff (and carry over current staff) qualifications and training information. Example for centers: S-COTQ-01, & 03, and P- CQT-01 would be scored with new staff and current staff data. The assessor rescores measures CQT-01. The Retain Star Level would **not** be used for Category 1 in either situation above. No, there have been no changes in staff. The assessor carries over scores applicable from the previous assessment for Director Education and Staff Qualifications. Assessor verifies that S-COTQ-03 is being met by looking at training hours for unobserved teachers and scores accordingly. If the score for S-COTQ-03 **remains the same** as previously assessed, the category can be marked N/A and the Retain Star Level used for Category 1. If the score is **not the same** as previously assessed, the assessor does not retain the star level for Category 1.
How long does the assessor spend in each class?	The one-hour core observation time is required for monitoring visits.

After the visit is complete, the assessor should score the facility immediately. The assessor should enter all scores into CLI Engage within 5 days of the visit.

Table 4. Entering Scores into the TRS Online Assessment Tool on CLI Engage

Task	Action
Start a New Assessment (Click on the play button.)	The assessment type is Annual Monitoring. Enter the following information: Enter the Visit Date (last day of the visit). Enter the Discuss Date (date the assessment was discussed with the director). Enter the approval date (original certification date). Enter the Recertification Date (original TRS-cycle end date). Enter Scores for all measures for classrooms observed. Enter Scores for all measures for the facility observed.
Classes Not Assessed	For the classes that are not observed, mark N/A. This will exclude them from the scoring criteria.
Finalize	Click on Finalize at the bottom. Note: For annual monitoring, the Preview feature is disabled. You can view the category star level on the Retain Star page.
Retain Star Pop-Up Box	Denote which categories, if any, will retain their star level. Note: When you select Retain Star, you are choosing to retain the category star level from the previous assessment. This retained category star level will be considered in the overall star level for this assessment.
Example of Retain Star Page with No Changes Example: Center A had an initial assessment and the category scores were as follows: 2, 2, 2, 2, 2. During the annual monitoring visit Categories 1 and 3 were N/A, and Categories 2 and 4 were each scored 3. Therefore, only Categories 1 and 3 would retain their star level. Previous 2, 2, 2, 2 Current 0, 3, 0, 3 Combined Calculation 2, 3, 2, 3 Verified Star remains 2 Star	To retain the category star from the previous assessment, place a check mark in the category to retain the previous category star level. Click on Combine Calculation. The combined calculation will be the previous star level for Categories 1 and 3 and the current star rating for Categories 2 and 4. This yields a 2-star Calculated Star. As this is an annual monitoring visit, the Verified Star will not change. Click on Submit and the reports will be finalized.

Task	Action
Example of Retain Star Page with Changes Example: Center A had an initial assessment and the category scores were as follows: 2, 2, 2, 2. During the annual monitoring visit there were staff changes and updated policies. This results in combined new data and previous data that will yield the current star level. **Do not check Retain Previous Rating.**	Click on Combine Calculation to generate the Calculated Star and the Verified Star. The Calculated Star is based on the current assessment. The Verified Star is from the previous assessment and does not change during the annual monitoring visit.
Verify the Star Rating The star level will be calculated and will not include the measures in which there was an N/A. **Does the facility have CCR deficiencies noted on the screening form that may cause certification to be lowered?**	No—The Verified Star will remain the same as the Calculated Star. Yes—Denote the Verified Star per the Screening Form consequence. Place an event into the Event Log as denoted within the Change in Star Level section. Click on Submit.
What is done after the scores have been verified?	The assessor: • downloads and views reports (Results Report, Facility Report, and Class Report) for the facility and the classrooms; and • provides reports and discusses them with the TRS mentor and TRS program.

Did the facility fail to maintain its verified star level at the annual monitoring visit? (The calculated star is lower than the verified star.)	No—The TRS mentor may choose to have technical assistance based on results. Yes—The facility is placed on an SIA. Follow the instructions in the User Guide, SIA section.

Event Log

This section provides instructions to TRS assessors and mentors on how to use the Event Log for any of the situations below.

The prerequisites are as follows:
- Schools must be Active.
- The TRS assessor must be granted access to the school and the role must be assigned on the School Management Page.
- The TRS mentor must be granted access to the school and the role must be assigned on the Class Management Page for each class.

Uses of the Event Log are as follows:
- Auto-assignment for Military Programs (DOD)
- Recording lowering or increasing of a verified star level due to screening impacts
- Invalidating an assessment
- Communicating between TRS assessors and mentors
- Documenting SIAs, reconsiderations, status updates, lost certification, TRS probation, no longer participating and the like.
- Requesting validation of records for TECPDS
- Generation of TECPDS Reports
- Initial Licensing Deficiency
- Monitoring Deficiency
- Pre-assessment notes
- Logging Mentor visits

STEP 1: Log in to CLI Engage.

STEP 2: From the Dashboard view, click on TRS Assessment Tool.

STEP 3: Search for and click on the school or facility.
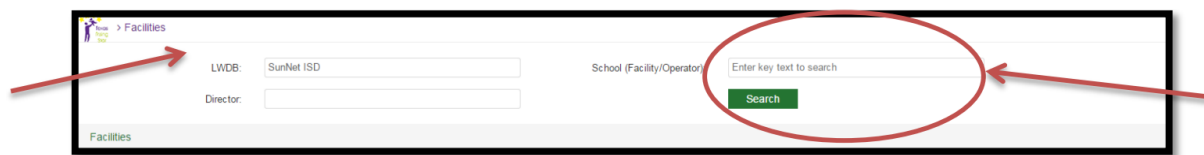
STEP 4: Locate the school and click on the Action button (play button).
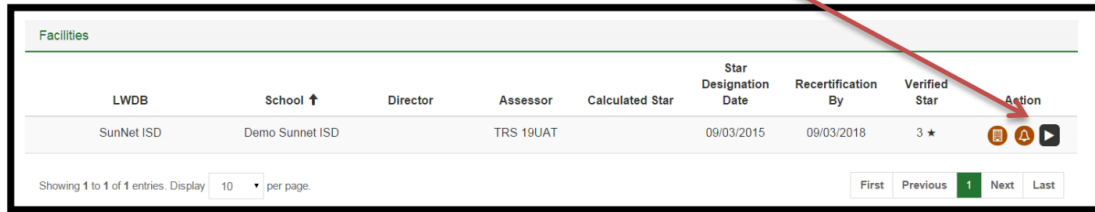
STEP 5: Click on the Event Log tab.
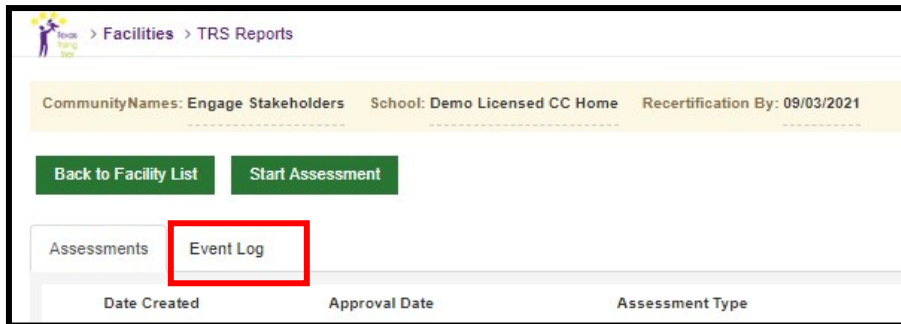
STEP 6: Click on Create Event. Complete items 1–9 below, as applicable to the event being created.
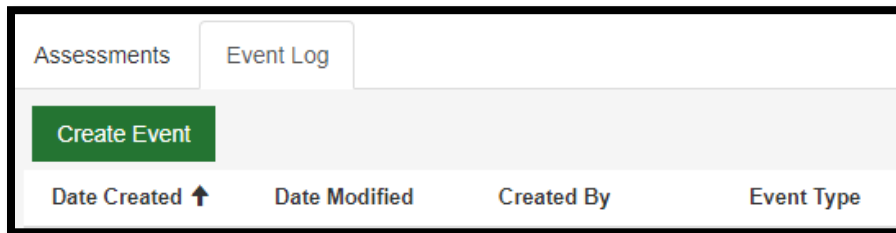
Event Log Creation

1. **Date Created**—date picker—Click on Date Created and select the date; this is the date of entry for the event.
2. **Date Modified** - auto populated if a previously created event entry is edited by user.
3. **Created By**—auto populated based on log-in credentials.
4. **Event Type**— (drop-down menu)—Choose the one that best fits the event that has occurred. See each of the sections below for Event Log type descriptions and instructions.
5. **Comment**—text box—Enter comments to explain the event and actions taken (up to 500 characters).
6. **Action Required**—date picker—If applicable, enter the date action or follow-up action that is required.
7. **Notification**—Yes or No (check box)—Check the box for yes or no to indicate whether a notification of this event should be sent to designated LWDB staff. The notification email contains information pertinent to the ELP and specific details about upcoming actions.
8. **Documentation**—file upload—Upload supporting documents to the Event Log.
9. **Action Button Set**—Three buttons might be displayed when you are placing or viewing an Event Log. The Disk button saves the Event Log; the No button cancels the Event Log; and the Edit button (the button with the pencil icon) allows you to modify an event already placed. However, this modification will create a new event that is added to the history view, is based on the time stamp, and is labeled "**modified**." When an event is modified, the most recent entry is displayed, and the previous entries are collapsed under the current entry. To view all entries, click the + button to the left of the date created. Modified entry (click + button to expand and view previous entries)

Date Created ↑	Date Modified	Created By	Event Type
08/24/2016	08/27/2016	jjjjj	(modified)

General Update

Events denoted as a **General Update** are those that do not change a star level or the status of a facility and could occur at any time within the facility's certification. This can include, but is not limited to, facility refusal of annual monitoring visit, change in mentor or assessor staff, facility changes, communication with facility that needs documentation, and change in director or contact. TWC issued guidance regarding extensions or waivers should be placed as a General Update.

Items 1–7 from the Event Log Creation section are required for input, and item 8 can be entered as applicable to the event.

Status Update

Events denoted as a **Status Update** are those that change a facility's status. This can include, but is not limited to, national accreditation received or lost, SIA issuance, SIA completion, military facility recertification, and requests for Category Reassessment and/or Star Level Evaluation.

Items 1–7 from the Event Log Creation section are required for input, and item 8 can be entered as applicable to the event.

Auto Assign

Events denoted as an **Auto Assign** are only for facilities that are military (Department of Defense) facilities.

Note: Changes to a star level based on a screening form for a military facility should be done as directed within Star Level Change type.

Items 1–7 and from the Event Log Creation section are required for input, and item 8 can be entered as applicable to the event.

Change in Star Level
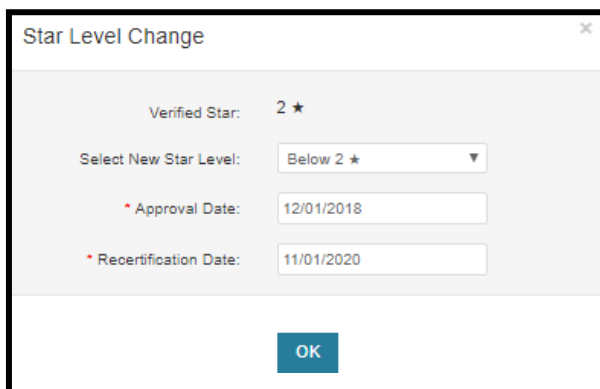
Events denoted as a **Star Level Change** are those that change the star level of a facility. These events include, but are not limited to, the loss of a star due to a screening form impact, gain of a star due to the end of the reduction time frame, and a change in a star level due to an SIA and/or redetermination of a Category Reassessment star level.

Items 1–7 from the Event Log Creation section are required for input, and item 8 can be entered as applicable to the event.

Documentation added should include, but is not limited to, a screening form, a screenshot of licensing history, and a TRS Notice of Impact form, as applicable.

Once the Star Level Change option has been chosen as the event type, a pop-up box appears to denote the Star Level Change. Select the new star level and enter the approval date and the recertification date.

Note: A warning pop-up box appears to verify that the change is accurate.

Reconsideration

An Event denoted as a **Reconsideration** occurs when:
- a facility requests a reconsideration; and/or
- a reconsideration visit has concluded.

Added documentation may include, but is not limited to, the written request for the reconsideration and documents supporting the initial scoring.

TRS Probation

Events denoted as a **TRS Probation** occur when the facility has been placed on probation due to CCR compliance. This event is denoted at the beginning and at the end of a TRS probation period.

Items 1–7 from the Event Log Creation section are required for input. Action Required is needed to set the reminder for the TRS probation timeframe of six months.

Technical Assistance Update

Events denoted as a **TA Update** occur when a facility receives substantial technical assistance from the mentor. This may include, but is not limited to, mentoring for initial certification, technical assistance for annual monitoring visits that did not result in SIA, mentoring finished, and facility requesting assessment. Any substantial technical assistance/mentoring visits, whether they are linked to the ELP's CQIP goals or not, will be logged into Engage via the event log and is to be accompanied by a completed Mentoring Visit Report.

Items 1–7 from the Event Log Creation section are required for input, and item 8 can be entered as applicable to the event.

No Longer Participating

Events denoted as **No Longer Participating** occur when an ELP is no longer participating in TRS. This may include, but not limited to, events such as closing of the facility or voluntarily withdrawing. Specific details related to this event must be noted in the comment section.

Quarterly Screening Review

These events, if they do not result in an impact, are to be noted as a General Update. For reviews that have an impact (either star level reduction or probation) use the applicable Event Log type instructions for data entry.

Examples of documentation that may be included are the completed screening form also stored on the school management page and a screenshot of the program's CCR licensing history.

Note: If the TRS staff's Board requires quarterly screenings to be inputted into TWIST, they are not necessary in CLI Engage when they result in no change of TRS status (probation or star level reduction).

Pre-Assessment

Events noted as **Pre-assessment** occur when there are updates related to the Program's status related to the pre- assessment process. This is an auto-generated event that CLI Engage produces.

TECPDS Report

Events denoted as **TECPDS report** are automatically generated when the assessor clicks the Create TECPDS report button. This report will be used to score measures related to Category 1 for the director and applicable staff.

Initial Licensing Deficiency

Events denoted as **Initial Licensing Deficiency** are automatically generated based on the reporting of deficiencies found on the licensing report from CCR. Once the initial deficiencies button is clicked on the school management page, a copy of the report is also auto-generated and saved in the event log for reference.

Monitoring Licensing Deficiency

Events denoted as **Monitoring Licensing Deficiency** are automatically generated based on the reporting of deficiencies found on the licensing report from CCR. Once the monitoring deficiencies button is clicked on the school management page, a copy of the report is also auto-generated and saved in the event log for reference.

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Screening reports

For initial applicants, staff must use the Initial Screening form. To be eligible for certification, the ELP must comply with all requirements on the Initial Screening form, which is comprised of three sections (*see Staff Handbook for additional details*).

When completing the initial screening form TRS Specialist will follow the steps below:

Step 1: Log in to CLI Engage. The web page that appears is the main Dashboard page for CLI Engage.

Step 2: Go to the bottom of this page and click on the Class & Student Management button under the Administrative Tools section.
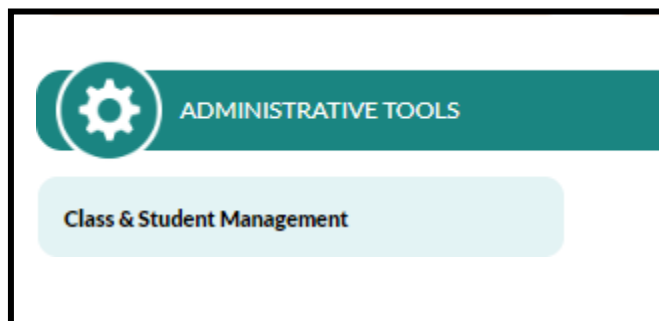
STEP 3: Locate the School Management tab
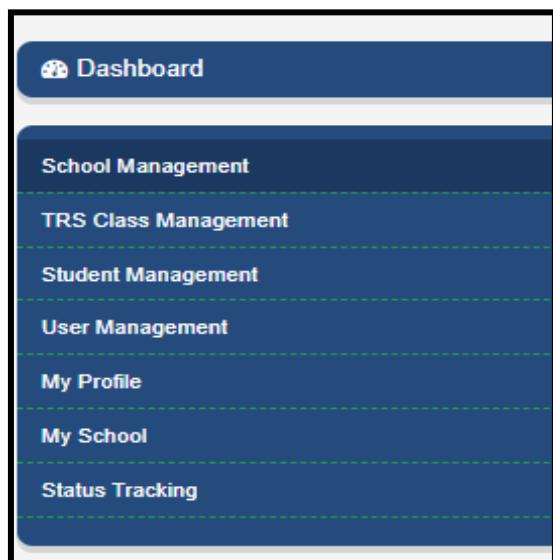
STEP 4: Click on the Pre-Assessment button.
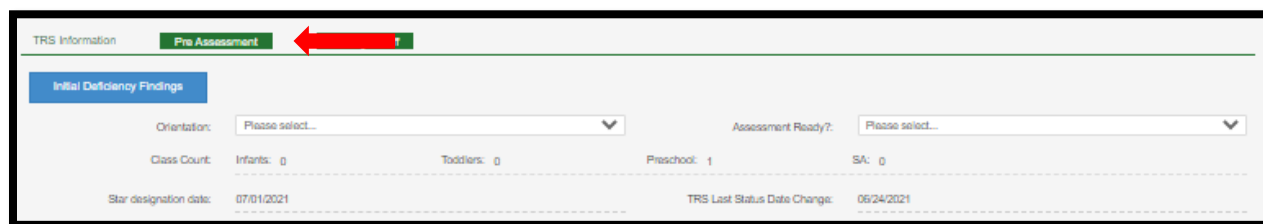
STEP 5a: Click on the ***Initial Deficiency Findings*** button to activate the importing of the deficiencies reported in the Child Care Regulation database.
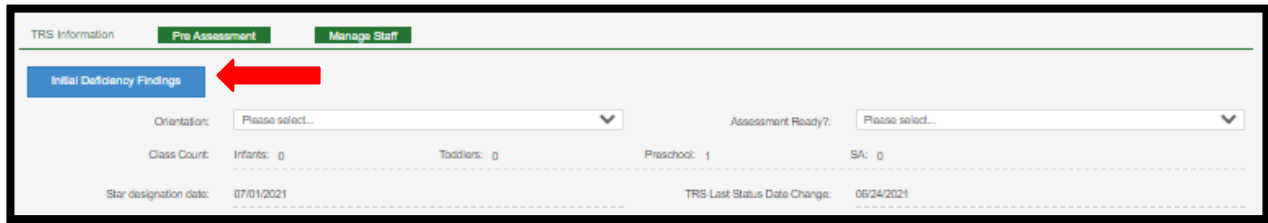
Step 5b: Once the initial deficiency findings button is activated, a list of the reported deficiencies will populate at the bottom of the screen under the Deficiency findings section. This information also includes the standard number/description of the deficiency, the date of the occurrence and the associated risk level. *A copy of this information is also automatically generated in the event log as an entry for initial licensing deficiency (see screenshot below).*

Deficiency Findings

Index	Standard Number Description	Standard Risk Level	Deficiency Date ↓	Special Type
1	746.1201(1) - Responsibilities of Employees and Caregivers -Demonstrate Competency, Good Judgment, Self-control	High	06/22/2021	
2	746.2805(4) - Prohibited Punishments - Hitting with Hand or Instrument	High	06/22/2021	
3	746.1201(1) - Responsibilities of Employees and Caregivers -Demonstrate Competency, Good Judgment, Self-control	High	06/22/2021	
4	746.2407 - Infant Care Area Furnishings and Equipment -Use of Safety Straps	Medium High	06/22/2021	
5	746.305(a)(2) - Report Child Injury Requiring Medical Treatment	Medium High	06/22/2021	

Section key:

Standard Number Description - lists the associated number of the deficiency and a short description.

Standard Risk Level - categorizes the level of the deficiency based on the pre-determined criteria (Critical, High, Medium, etc.).

Created on - the date the deficiency was cited.

Event Log entry:

06/22/2021	06/22/2021	Jasmine Wiggins	Initial Licensing Deficiency	Click to review Deficiency Findings	06/22/2021	Yes

Deficiency Findings			
Index	Standard Number Description	Standard Risk Level	Deficiency Date ↓
1	746.1201(1) - Responsibilities of Employees and Caregivers - Demonstrate Competency, Good Judgment, Self-control	High	06/22/2021
2	746.2805(4) - Prohibited Punishments - Hitting with Hand or Instrument	High	06/22/2021
3	746.1201(1) - Responsibilities of Employees and Caregivers - Demonstrate Competency, Good Judgment, Self-control	High	06/22/2021
4	746.2407 - Infant Care Area Furnishings and Equipment -Use of Safety Straps	Medium High	06/22/2021
5	746.305(a)(2) - Report Child Injury Requiring Medical Treatment	Medium High	06/22/2021

STEP 5c: Once the required documents along with screening deficiencies have been reviewed, the assessor will contact the Program Director with next steps and complete step 6 as applicable. *This information contributes to determining eligibility for participation in the Texas Rising Star certification program.*

STEP 6a: If an impact was incurred, please follow the steps outlined in the EUG for the applicable action.

STEP 6b: If no impact incurred, screening is complete and no additional documentation is needed. Create an

event log entry with event type initial licensing deficiency and note: No deficiencies cited.

Screening Forms (Certified Programs)

For currently certified Texas Rising Star ELPs, staff must use the Current Screening form, which is comprised of five sections, before any assessment and each quarter (*see Staff Handbook for additional details*).

When completing the screening form, TRS Specialist will follow steps 1-4 outlined in the previous section.

STEP 5a: Click on the *Monitoring Deficiency Findings* button to activate the importing of the deficiencies reported in the Child Care Regulations database.
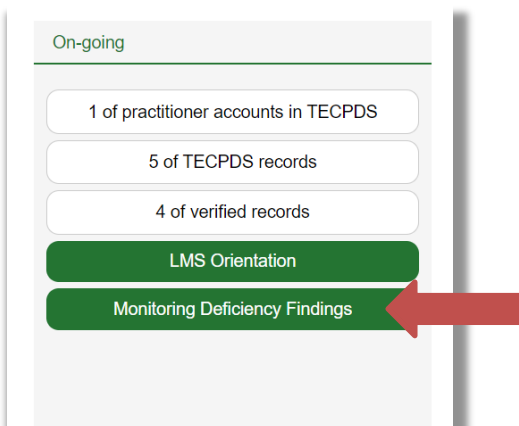
Step 5b: Once the monitoring deficiency findings button is activated, a list of the reported deficiencies will populate at the bottom of the screen under the Deficiency findings section. Note: The deficiencies listed reflect those cited within the most recent twelve-month period. Therefore, this list *could* contain newly cited deficiencies or previously cited deficiencies may no longer appear if they fall outside of the 12-month period of review. *Note: *The screening deficiency data is updated daily from the CCR database.*

Index	Standard Number Description	Standard Risk Level	Deficiency Date ↓	Special Type
1	746.2407 - Infant Care Area Furnishings and Equipment - Use of Safety Straps	Medium High	06/22/2021	
2	746.2405(1) - Infant Care Area Furnishings and Equipment - Adult-sized Chair	Medium High	06/22/2021	
3	746.1201(1) - Responsibilities of Employees and Caregivers -Demonstrate Competency, Good Judgment, Self-control	High	06/22/2021	
4	746.1201(2) - Responsibilities of Employees and Caregivers -Relate to Children	High	06/22/2021	
5	746.1203(4) - Responsibilities of Caregivers- Supervision of Children	High	06/22/2021	

*A copy of this information is also automatically generated in the event log as an entry for initial licensing deficiency (see screenshot below).

06/22/2021	06/22/2021	Jasmine Wiggins	Monitoring Licensing Deficiency	Click to review Deficiency Findings ▼	06/22/2021	Yes	🖊

STEP 5c: Once the required documents along with screening deficiencies have been reviewed, the assessor will contact the Program Director with next steps and complete step 6 as applicable. **This information contributes to determining eligibility for participation in the Texas Rising Star certification program. Please see Staff Handbook for details.*

**STEP 6a:** If an impact was incurred, please follow the steps outlined in the EUG for the applicable action.

STEP 6b: If no impact incurred, screening is complete and no additional documentation is needed. Create an event log entry with event type monitoring licensing deficiency and note: No deficiencies cited.

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TRS POWER-BI REPORT USER GUIDE

The TRS Screening Form report is designed to give users access to deficiency data for schools, which comes directly from Child Care Regulations. There are 2 versions of this report:

1. **LWDB Report**: Each of the 28 LWDB's will have their own report with data just for the schools in their local workforce board. This report will be available on each of the LWDB's respective TRS webpages and will require a password to log in (to be provided by CLI). <u>All the information shown on this report is for the current 12 months</u>. Deficiencies older than 12 months from the "Updated On" date in the report are not displayed or counted.

Both reports showcase the same information except for the bar graphs, where the data is displayed using different parameters.

LWDB Report:

Access: Each LWDB will go to their respective TRS webpage and enter their password to access the site.

Once logged in, the Board will have access to the following reports:

Click here to access the different report types

Report 1 TRS Assessment with excel download

This report provides a global look of the completed facility assessments and the programs overall star rating and ratings by category. This report also has the option to be downloaded for Board's use.

Report 2 The TRS Screening Form Report (3 pages)

Page 1: CCR Deficiency Data

Displays operation information and deficiency data for all schools in the LWDB incurred in the last 12 months. Each school can have multiple records on this page, depending on how many CCR deficiencies they were cited for in the 12-month period. If a school was cited for a firearm deficiency, that record will be displayed on this page (with a "Yes" in the Firearm Citation field).

There will be 1 record per deficiency (all deficiency risk levels will be displayed), but only High and Medium High deficiencies are highlighted on this page. The bar graph at the top of the page shows the number of schools in the LWDB who have 15 or more High/Medium High deficiencies. This data is displayed by operation type.

Overall LWDB View on Page 1 – before a school is selected

This is the first page the user will see (with data for all counties and schools displayed)

Bar Graph: shows that this LWDB has 8 schools with >= 15 CCR Deficiencies (5 Licensed Centers and 3 Registered Child Care Homes)

Top Right Panel
- **SCHOOLS**: Total # of Schools in LWDB
- **TOTAL DEFICIENCIES**: Total # of deficiencies (all risk levels) for all schools in the LWDB
- **HIGH**: Total # of 'High' Deficiencies for all schools in the LWDB
- **MEDIUM-HIGH**: Total # of 'Medium High' Deficiencies for all schools in the LWDB
- **TOTAL HIGH/MED-HIGH**: HIGH + MEDIUM-HIGH Totals for all schools in the LWDB

SCHOOLS WITH TOTAL CCR HIGH/MEDIUM-HIGH DEFICIENCIES >= 15 BY LWDB

LWDB	DFPS LICENSE NUMBER	OPERATION NAME	OPERATION TYPE	DIRECTOR NAME	ISSUANCE TYPE	LICENSING HISTORY > 1 YEAR	CORRECTIVE ACTION	ADVERSE ACTION	FIREARM CITATION	DEFICIENCY DATE	DEFICIENCY DESCRIPTION	CCR RISK LEVEL	VERIFIED STAR
Tarrant County WDB - 5	1715677	2 Bs Childcare and Learning Center	Licensed Center	Patsy Black	Initial	No	No	No	No	4/30/2021 10:30:00 AM	746.901(4) - Required Personnel Records - Required Affidavit	Medium Low	No Star Rating
Tarrant County WDB - 5	1715677	2 Bs Childcare and Learning Center	Licensed Center	Patsy Black	Initial	No	No	No	No	2/4/2021 11:30:00 AM	746.3701 - Safety - Areas Free From Hazards	Medium High	No Star Rating
Tarrant County WDB - 5	1715677	2 Bs Childcare and Learning Center	Licensed Center	Patsy Black	Initial	No	No	No	No	2/4/2021 11:30:00 AM	746.501(a)(10) - Written Operational Policies - Meals	Medium	No Star Rating
Tarrant County WDB - 5	1715677	2 Bs Childcare and Learning Center	Licensed Center	Patsy Black	Initial	No	No	No	No	1/28/2021 11:40:00 AM	746.2405(1) - Infant Care Area Furnishings and Equipment - Adult-sized Chair	Medium High	No Star Rating
Tarrant County WDB - 5	1715677	2 Bs Childcare and Learning Center	Licensed Center	Patsy Black	Initial	No	No	No	No	1/28/2021 11:40:00 AM	746.3407(12) - Mark Cleaning Supplies, Toxic Materials; Keep Separate from Food and Inaccessible to Children	High	No Star Rating
Tarrant County WDB - 5	1715677	2 Bs Childcare and Learning Center	Licensed Center	Patsy Black	Initial	No	No	No	No	1/28/2021 11:40:00 AM	746.3701 - Safety - Areas Free From Hazards	Medium High	No Star Rating
Tarrant County WDB - 5	1715677	2 Bs Childcare and Learning Center	Licensed Center	Patsy Black	Initial	No	No	No	No	1/28/2021 11:40:00 AM	746.401(4) - Posting Requirements - Emergency and evacuation relocation diagram	Medium High	No Star Rating
Tarrant County WDB - 5	1715677	2 Bs Childcare and Learning Center	Licensed Center	Patsy Black	Initial	No	No	No	No	1/28/2021 11:40:00 AM	746.801(11) - Required Records Maintained and Made Available - Fire Inspection Report, Including Written Approval for Above/Below Ground Level Care	Medium High	No Star Rating
Tarrant County WDB - 5	1570169	A Mother's Touch Early Childhood Development Center Inc.	Licensed Center	Patina Clark	Full Permit	Yes	No	No	No				No Star Rating

LWDB: **Tarrant County WDB - 5** UPDATED ON: 07/20/2021

SCHOOLS: 1027   TOTAL DEFICIENCIES: 2520

430 HIGH   832 MEDIUM-HIGH   1262 TOTAL HIGH/MED-HIGH

SCHOOLS: All

Use Filters to Search for a School by County

Additional Filters

COUNTY
- ☐ Select all
- ☐ TARRANT

VERIFIED STAR
- ☐ Select all
- ☐ 2*
- ☐ 3*
- ☐ 4*
- ☐ Below 2*
- ☐ No Star Rating

OPERATION TYPE
- ☐ Select all
- ☐ Licensed Center
- ☐ Licensed Child-Care Home
- ☐ Registered Child-Care Home

ISSUANCE TYPE
- ☐ Select all
- ☐ Full Permit
- ☐ Initial
- ☐ Registered
- ☐ Renewed Initial

Details Panel: Shows Operation Details & Deficiency Data for all schools

1 of 3

Pages: Click to Navigate Between Pages

If a LWDB does not have any schools that have >=15 CCR High/ Medium High deficiencies, the panel at the top will not have a bar graph.

This LWDB does not have any schools with >= 15 deficiencies so there will not be a bar graph in this section.

SCHOOLS WITH TOTAL CCR HIGH/MEDIUM-HIGH DEFICIENCIES >= 15 BY LWDB

OPERATION TYPE

LWDB	UPDATED ON
Brazos Valley WDB - 16	07/20/2021

SCHOOLS	TOTAL DEFICIENCIES
167	318

50 HIGH	103 MEDIUM-HIGH	153 TOTAL HIGH/MED-HIGH

SCHOOLS
All

LWDB	DFPS LICENSE NUMBER	OPERATION NAME	OPERATION TYPE	DIRECTOR NAME	ISSUANCE TYPE	LICENSING HISTORY > 1 YEAR	CORRECTIVE ACTION	ADVERSE ACTION	FIREARM CITATION	DEFICIENCY DATE	DEFICIENCY DESCRIPTION	CCR RISK LEVEL	VERIFIED STAR
Brazos Valley WDB - 16	1643902	A Bright Beginning	Licensed Center	Keley Barrientos	Full Permit	Yes	No	No	No	1/14/2021 10:00:00 AM	745.651(2)(A) - Background Check Validation ? Every 3 months each operation, other than a licensed, registered, or listed home, must validate current list	Medium	2*
Brazos Valley WDB - 16	1546662	A Step Above	Licensed Child-Care Home	Janet Ogle	Full Permit	Yes	No	No	No				No Star Rating
Brazos Valley WDB - 16	192770	A&M United Methodist Weekday School	Licensed Center	Tina Matthews	Full Permit	Yes	No	No	No	7/7/2021 7:50:00 AM	746.2427 - AP Infants Sleep on Backs or Must Have Completed and Signed Sleep Exception Form for the Infant	High	3*
Brazos Valley WDB - 16	192770	A&M United Methodist Weekday School	Licensed Center	Tina Matthews	Full Permit	Yes	No	No	No	7/7/2021 7:50:00 AM	746.3407 - Maintenance of Building, Grounds and Equipment	Medium High	3*
Brazos Valley WDB - 16	192770	A&M United Methodist Weekday School	Licensed Center	Tina Matthews	Full Permit	Yes	No	No	No	7/7/2021 7:50:00 AM	746.3407(8) - Garbage Inaccessible to Children; Maintained in Sanitary Manner	Medium High	3*
Brazos Valley WDB - 16	192770	A&M United Methodist Weekday School	Licensed Center	Tina Matthews	Full Permit	Yes	No	No	No	7/7/2021 7:50:00 AM	746.3701 - Safety - Areas Free From Hazards	Medium High	3*
Brazos Valley WDB - 16	192770	A&M United Methodist Weekday School	Licensed Center	Tina Matthews	Full Permit	Yes	No	No	No	7/7/2021 7:50:00 AM	746.4135(c) - Children's Products-Posting of CPSC website	Medium	3*
Brazos Valley WDB - 16	192770	A&M United Methodist Weekday School	Licensed Center	Tina Matthews	Full Permit	Yes	No	No	No	7/7/2021 7:50:00 AM	746.5311(a) - Smoke-Detection System	High	3*

COUNTY
- [ ] Select all
- [ ] BRAZOS
- [ ] BURLESON
- [ ] GRIMES
- [ ] LEON
- [ ] MADISON
- [ ] ROBERTSON
- [ ] WASHINGTON

VERIFIED STAR
- [ ] Select all
- [ ] 2*
- [ ] 3*
- [ ] 4*
- [ ] No Star Rating

OPERATION TYPE
- [ ] Select all
- [ ] Licensed Center
- [ ] Licensed Child-Care Home
- [ ] Registered Child-Care Home

ISSUANCE TYPE
- [ ] Select all
- [ ] Certified
- [ ] Full Permit
- [ ] Initial
- [ ] Registered

1 of 3

Searching for a School

Users are encouraged to use the filters on the right-hand side of the report (from the overall LWDB view) to search for a school. They should first select the county and then pick the school they are looking for from the drop-down list. Once a selection is made, the data will be filtered for that school.

Bar Graph: If there is an orange bar graph in this panel for the selected school, it indicates that this school has >= 15 CCR High/Medium High Deficiencies.

If there is no orange bar graph in this panel for the selected school, it indicates that this school has less than 15 CCR High/Medium High Deficiencies

Top Right Panel
SCHOOLS: # of schools returned from using Schools filter (should be 1)
TOTAL DEFICIENCIES: Total # of deficiencies (all risk levels) for selected school
HIGH: Total # of 'High' Deficiencies for selected school
MEDIUM-HIGH: Total # of 'Medium High' Deficiencies for selected school
TOTAL HIGH/MED-HIGH: HIGH + MEDIUM-HIGH Totals

Selected School

Assessor can use this field at a glance to see how many High/Medium High deficiencies a school has

This school has a total of 37 deficiencies in the last 12 months. Of these, 21 are rated as High/ Medium High deficiencies. Since this school has >= 15 High/Medium High deficiencies, there will be an orange bar in the top panel.

Schools with the Same Name: A LWDB may have multiple schools with the exact same name which is why it is important for the user to look at the SCHOOLS count after using the Schools filter. If the SCHOOLS count is greater than 1, the user should filter the data some more (by county) or use the CCR License Number to differentiate between the schools and calculate the correct number of deficiencies. The TOTAL DEFICIENCIES listed here (3) is for both schools. However, if you filter the data further (by county), this number will be accurate (2 for school with CCR License Number 182223 and 1 for school with CCR License Number 135234).

Clearing Filters: Once a selection has been made and the user wants to search for a new school, the filters may need to be cleared if the school they are searching for is not on the drop-down list. If on a different page, go back to Page 1 and look at each of the filters previously used, and click on the "Select all" option for each one starting with the most limiting filter. For example, in the screenshot above, if the user wants to search for a school that is not in Burleson or Washington, if they click on the SCHOOLS filter, the school will not show up. To clear the filters, they would have to first "Select all" for COUNTY and then click on "Select all" for SCHOOLS.

Once they "Select all", all the check boxes will appear black. Click on "Select all" a second time to uncheck all the selections. This will refresh the list of counties and schools in that LWDB.

Another option would be to click on the refresh page icon on the browser to reset all the filters.

Refresh button on browser

Please note: If a filter is applied on any one page, the other pages will automatically be filtered by the same criteria. For example, if ABC School is selected on page 1, pages 2 and 3 will show data for ABC School as well. To clear the filters on pages 2 and 3 (if the user wants to make a different selection), they can use the clearing filters options above.

Page 2: TRS Selected Deficiency Data

Displays **TRS Selected** deficiencies for all schools in the LWDB incurred in the last 12 months. TRS Selected deficiencies

are the deficiencies listed on the Initial Screening Forms for all three operation types. Each school can have multiple

records on this page, depending on how many TRS Selected deficiencies they were cited for in the 12-month period. These deficiencies are a subset of the Total Deficiencies listed on Page 1 of the report. Firearm deficiencies are not included on this page (they are shown on Page 1 only). If a school does not have any TRS Selected deficiencies, they will not show up in the filters on Page 2. Always go back to Page 1 to start a new search.

Overall LWDB View on Page 2 - includes all counties and schools

Bar Graph: shows that in this LWDB, there are 19 TRS Selected Deficiencies in Licensed Centers, 8 in Licensed Child-Care Homes and 8 in Registered Child-Care Homes (35 Total)

*Note: One school can account for multiple deficiencies. For example, of the 8 deficiencies in Registered Child-Care homes, 1 school accounts for 5 of them

TRS SELECTED DEFICIENCIES: There are 35 of these deficiencies in this LWDB

TOTAL TRS SELECTED DEFICIENCIES IN LAST 12 MONTHS BY LWDB

Bar graph:
- Licensed Center: 19
- Licensed Child-Care Home: 8
- Registered Child-Care Home: 8

OPERATION TYPE

TRS SELECTED DEFICIENCIES
35

COUNTY	SCHOOLS
All	All

VERIFIED STAR	OPERATION TYPE
All	All

TRS SELECTED DEFICIENCY DESCRIPTION
- ☐ Select all
- ☐ 745.621(b)(2) - Renewal background checks submitted - When y...
- ☐ 745.641 - AP Background check results - Must receive notificatio...
- ☐ 746.1003(1) - Director Responsibilities - Operate in Compliance
- ☐ 746.1201(1) - Responsibilities of Employees and Caregivers -De...
- ☐ 746.1201(4) - Responsibilities of Employees and Caregivers -Ens...
- ☐ 746.1203(4) - Responsibilities of Caregivers- Supervision of Child...
- ☐ 746.1315(b) - Each Caregiver and the Director Must Have Curren...
- ☐ 746.2805 - Prohibited Punishments - No Harsh, Cruel or Unusual
- ☐ 746.2805(4) - Prohibited Punishments - Hitting with Hand or Ins...
- ☐ 746.2805(6) - Prohibited Punishments - Humiliating, Rejecting, Y...
- ☐ 746.3805(b)(3) - Administering Medication - Not After Expiratio...
- ☐ 747.1313(a) - Pediatric First-Aid and Pediatric CPR Training - Pri...
- ☐ 747.1313(b) - Pediatric First-Aid and Pediatric CPR Training -skill...
- ☐ 747.207(1) - Policies Comply with Rules
- ☐ 747.2705(1) - Prohibited Punishments - Corporal Punishment
- ☐ 747.3501 - Safety - Areas Free From Hazards
- ☐ 747.3501(3) - Safety - Air Conditioners, Fans, Heaters Safeguarded
- ☐ 747.3501(8) - Safety - Bodies of Water Inaccessible to Children
- ▶

These filters can be used to see a list of schools that have a certain type of TRS Selected Deficiency

LWDB	COUNTY	DFPS LICENSE NUMBER	OPERATION NAME	OPERATION TYPE	VERIFIED STAR	DEFICIENCY DATE	DEFICIENCY DESCRIPTION
Brazos Valley WDB - 16	MADISON	1673207	Alisha Hill/Rockin Rebel Roost	Licensed Child-Care Home	No Star Rating	10/16/2020 2:45:00 PM	747.3501 - Safety - Areas Free From Hazards
Brazos Valley WDB - 16	BRAZOS	1681868	Barbara Grissom	Registered Child-Care Home	No Star Rating	12/21/2020 1:50:00 PM	747.3501 - Safety - Areas Free From Hazards
Brazos Valley WDB - 16	BRAZOS	1702100	BCS New Horizons Learning Center LLC	Licensed Center	No Star Rating	6/28/2021 11:40:00 AM	746.1003(1) - Director Responsibilities - Operate in Compliance
Brazos Valley WDB - 16	BRAZOS	812153	BVCAA Early Head Start Center	Licensed Center	No Star Rating	10/5/2020 5:13:00 PM	746.1201(1) - Responsibilities of Employees and Caregivers - Demonstrate Competency, Good Judgment, Self-control
Brazos Valley WDB - 16	BRAZOS	812153	BVCAA Early Head Start Center	Licensed Center	No Star Rating	10/5/2020 5:13:00 PM	746.2805 - Prohibited Punishments - No Harsh, Cruel or Unusual
Brazos Valley WDB - 16	BRAZOS	1305028	Connie Stone	Registered Child-Care Home	No Star Rating	5/17/2021 4:00:00 PM	745.641 - AP Background check results - Must receive notification prior to allowing subject to be present at your operation
Brazos Valley WDB - 16	BRAZOS	1305028	Connie Stone	Registered Child-Care Home	No Star Rating	5/17/2021 4:00:00 PM	747.2705(1) - Prohibited Punishments - Corporal Punishment
Brazos Valley WDB - 16	BRAZOS	1305028	Connie Stone	Registered Child-Care Home	No Star Rating	5/17/2021 4:00:00 PM	747.3501 - Safety - Areas Free From Hazards
Brazos Valley WDB - 16	BRAZOS	1305028	Connie Stone	Registered Child-Care Home	No Star Rating	5/17/2021 4:00:00 PM	747.3501(8) - Safety - Bodies of Water Inaccessible to Children
Brazos Valley WDB - 16	BRAZOS	1305028	Connie Stone	Registered Child-Care Home	No Star Rating	9/28/2020 8:35:00 AM	747.3501 - Safety - Areas Free From Hazards
Brazos Valley WDB - 16	ROBERTSON	826929	First Step Learning Center	Licensed Center	3*	6/15/2021 8:50:00 AM	746.3805(b)(3) - Administering Medication - Not After Expiration date
Brazos Valley WDB - 16	ROBERTSON	826929	First Step Learning Center	Licensed Center	3*	9/2/2020 11:56:00 AM	746.1201(4) - Responsibilities of Employees and Caregivers -Ensure No Child Abused, Neglected, or Exploited
Brazos Valley WDB - 16	ROBERTSON	826929	First Step Learning Center	Licensed Center	3*	9/2/2020 11:56:00 AM	746.2805(4) - Prohibited Punishments - Hitting with Hand or Instrument
Brazos Valley WDB - 16	ROBERTSON	826929	First Step Learning Center	Licensed Center	3*	9/2/2020 11:56:00 AM	746.2805(6) - Prohibited Punishments - Humiliating, Rejecting, Yelling
Brazos Valley WDB - 16	LEON	864608	Green Acres DayCare	Licensed Center	No Star Rating	12/3/2020 2:00:00 PM	745.641 - AP Background check results - Must receive notification prior to allowing subject to be present at your operation

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School View on Page 2: Once a school is selected on Page 1, Page 2 will display the results for that same school as well.

User selects school from drop down list on Page 1.

LWDB	DFPS LICENSE NUMBER	OPERATION NAME	OPERATION TYPE	DIRECTOR NAME	ISSUANCE TYPE	LICENSING HISTORY > 1 YEAR	CORRECTIVE ACTION	ADVERSE ACTION	FIREARM CITATION	DEFICIENCY DATE	DEFICIENCY DESCRIPTION	CCR RISK LEVEL	VERIFIED STAR
Alamo WDB - 20	896370	Apple Tree Day School	Licensed Center	Jennifer Voigt	Full Permit	Yes	No	No	No	2/2/2021 1:35:00 PM	745.641 - AP Background check results - Must receive notification prior to allowing subject to be present at your operation	High	No Star Rating
Alamo WDB - 20	896370	Apple Tree Day School	Licensed Center	Jennifer Voigt	Full Permit	Yes	No	No	No	2/2/2021 1:35:00 PM	746.3805(b)(1) - Administering Medication - Original Container with Child's Name, Date	Medium High	No Star Rating
Alamo WDB - 20	896370	Apple Tree Day School	Licensed Center	Jennifer Voigt	Full Permit	Yes	No	No	No	2/2/2021 1:35:00 PM	746.3819 - Food Allergy Emergency Plan Signed by Parents and Health Care Professional	Medium High	No Star Rating
Alamo WDB - 20	896370	Apple Tree Day School	Licensed Center	Jennifer Voigt	Full Permit	Yes	No	No	No	1/20/2021 1:20:00 PM	746.1613(a) - Reduction of child/caregiver naptime ratio by 50% allowed, If 13 or more children in care, children are 18 mo. or older and other standards met	Medium	No Star Rating
Alamo WDB - 20	896370	Apple Tree Day School	Licensed Center	Jennifer Voigt	Full Permit	Yes	No	No	No	1/20/2021 1:20:00 PM	746.3805(b)(1) - Administering Medication - Original Container with Child's Name, Date	Medium High	No Star Rating
Alamo WDB - 20	896370	Apple Tree Day School	Licensed Center	Jennifer Voigt	Full Permit	Yes	No	No	No	1/20/2021 1:20:00 PM	746.3819 - Food Allergy Emergency Plan Signed by Parents and Health Care Professional	Medium High	No Star Rating

1 of 3

This school has a total of 6 deficiencies. Of these, 5 are High/ Medium High Deficiencies.

Page 2 displays results for the school selected on Page 1 if it has any TRS Selected deficiencies.
Of the 5 High/ Medium High deficiencies shown on Page 1, 3 of them are TRS Selected deficiencies. The bar graph shows that this licensed center has 3 TRS Selected deficiencies.

TABLE (top screenshot data):

LWDB	COUNTY	DFPS LICENSE NUMBER	OPERATION NAME	OPERATION TYPE	VERIFIED STAR	DEFICIENCY DATE	DEFICIENCY DESCRIPTION
Alamo WDB - 20	KENDALL	896370	Apple Tree Day School	Licensed Center	No Star Rating	2/2/2021 1:35:00 PM	745.641 - AP Background check results - Must receive notification prior to allowing subject to be present at your operation
Alamo WDB - 20	KENDALL	896370	Apple Tree Day School	Licensed Center	No Star Rating	2/2/2021 1:35:00 PM	746.3805(b)(1) - Administering Medication - Original Container with Child's Name, Date
Alamo WDB - 20	KENDALL	896370	Apple Tree Day School	Licensed Center	No Star Rating	1/20/2021 1:20:00 PM	746.3805(b)(1) - Administering Medication - Original Container with Child's Name, Date

Type of TRS Selected Deficiencies Cited for this school

If a school has not had any TRS Selected deficiencies in the past 12 months, there will not be a bar graph or any entries for this school on Page 2. The TRS SELECTED DEFICIENCIES count at the top of the page will be 0.

TRS SELECTED DEFICIENCIES = 0
This school has not been cited for any TRS Selected Deficiencies in the past 12 months so Page 2 will not be populated. Other non-TRS Selected deficiencies (if any) will be displayed on Page 1.

Page 3: Map Locator
Map locator with information on where a school is located physically on the map.
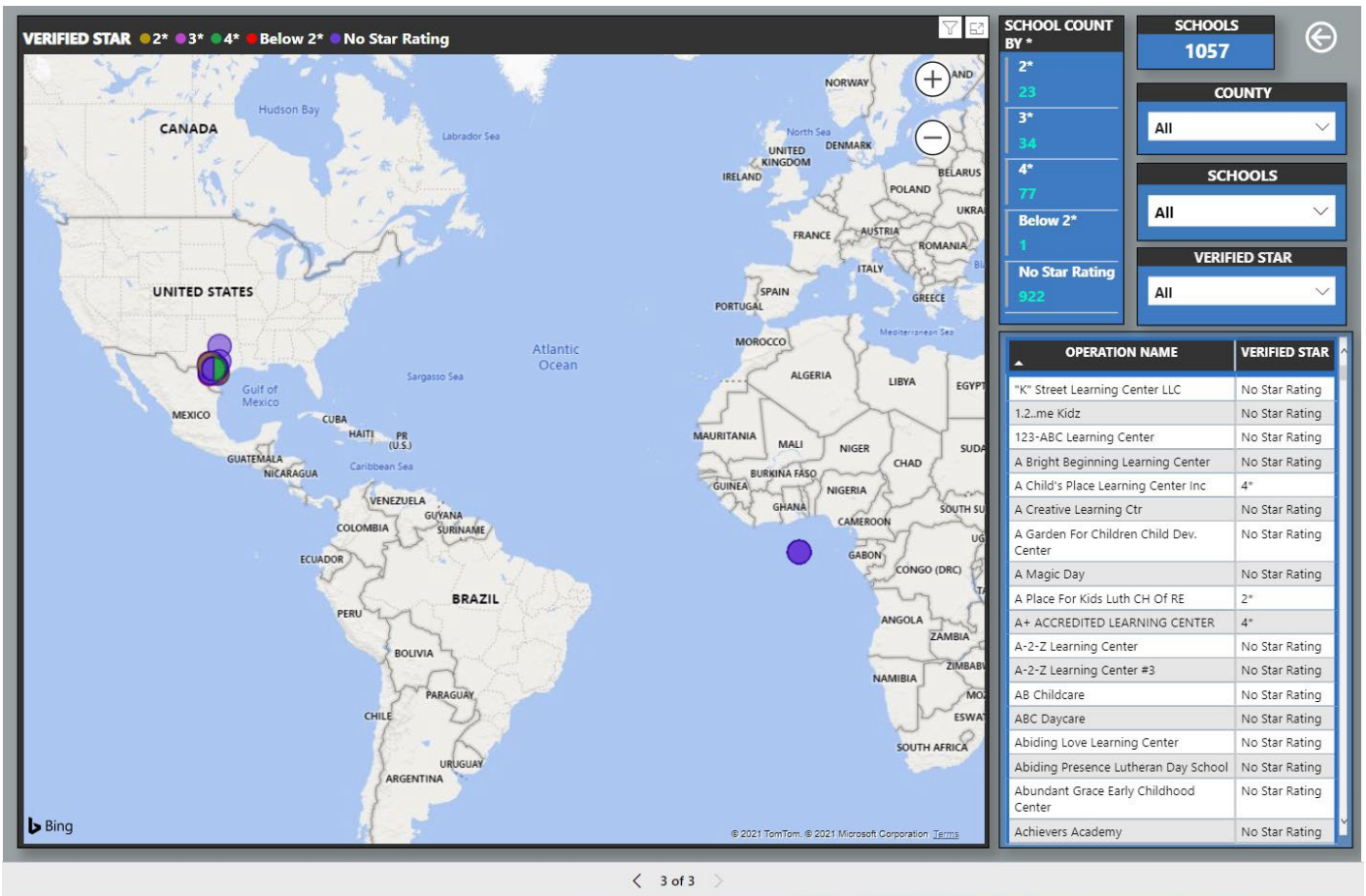
Report 3 Facility Forecasting Report

This report is specific to your Board's early learning programs' certification cycle, based on the recertification date inputted into CLI Engage. This data can be used by your Board to forecast upcoming annual monitoring visits and recertification assessments. Due to the nature of how this data is collected, it is imperative that assessors input accurate recertification dates within Engage. This report can be used to "forecast" how many assessments/visits boards will need to prepare for as it relates to caseload and scheduling visits.

TRS Guidance Board

This Guidance board is designed to be a platform that allows TRS Assessors, Mentors, and Board staff the opportunity to submit questions about the policies, implementation, or technology related to the Texas Rising Star Program.

These questions will be submitted through the methods below and a representative from the Texas Workforce Commission will respond to those questions that are related to policies and implementation, while representatives from the Children's Learning Institute will respond to those related to technology and scoring measures.

* Each staff member will have to be enrolled to view and submit questions. If you do not have access to the Guidance Board, please submit a Help Ticket and request access to the Guidance Board.

Viewing and Submitting Questions for TRS Guidance Board

Check the TRS guidance board for previously submitted questions. If your question appears with in the guidance board make note of the response. To check the guidance board, follow the steps below.

1. Login to **Engage**
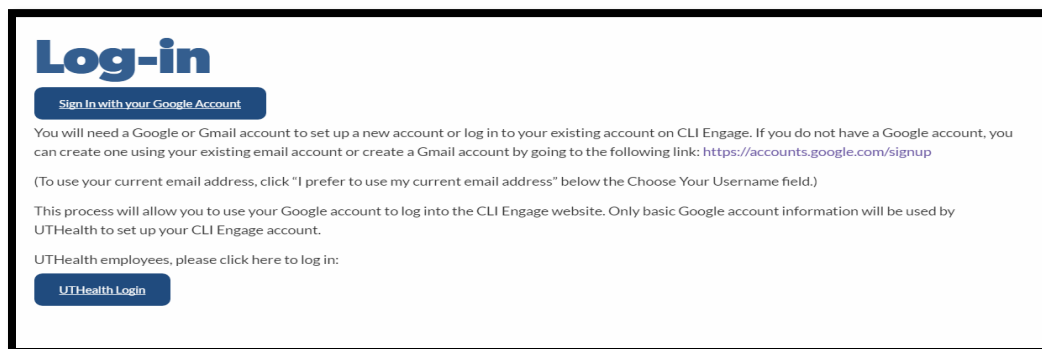
2. Scroll down to the **Texas Rising Star** Section, then click on **Guidance Board**.
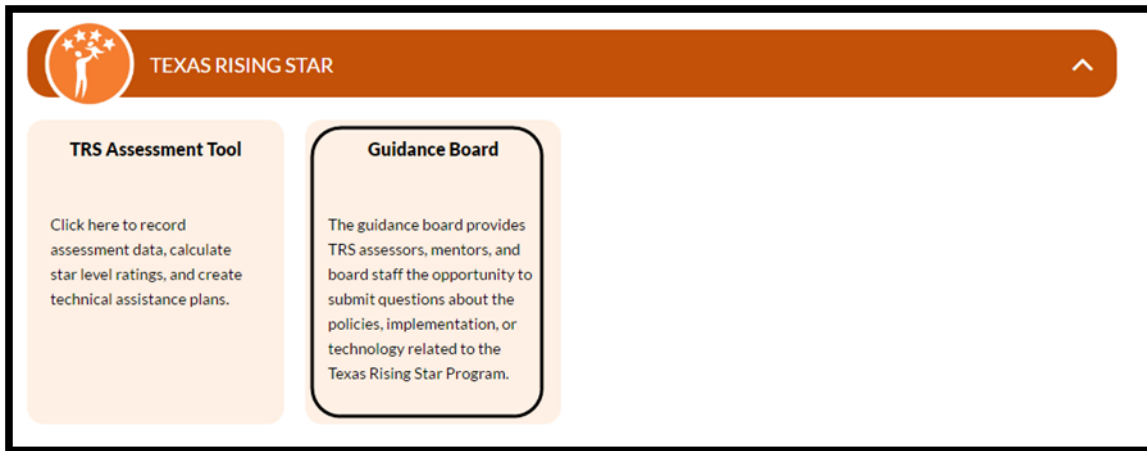
3. The **Guidance board** will open, Click on the topic area the relates to your question or view previous questions and answers submitted.
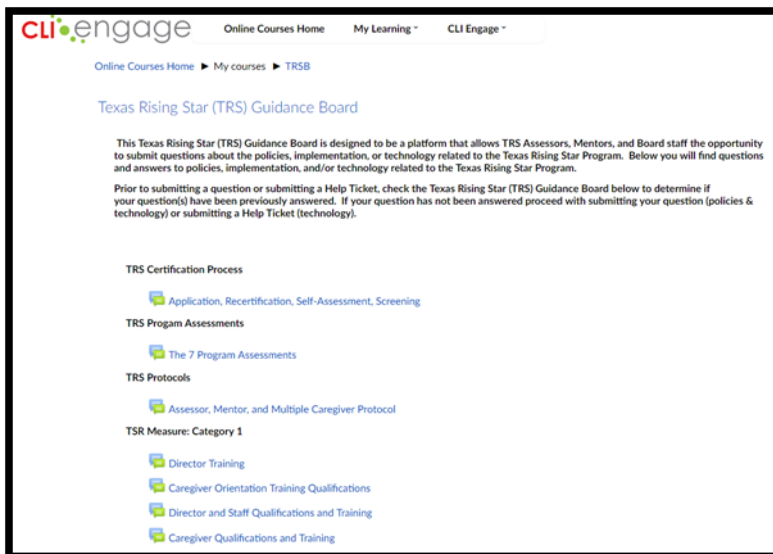
If your question does not appear on the guidance board, submit your question to **TexasRisingStarATCP@uth.tmc.edu** or submit a Help Ticket for technology issues.

Frequently Asked Questions

Is the annual monitoring visit entered into CLI Engage?
Yes. The assessor must enter all annual monitoring scores into the TRS Assessment Tool on CLI Engage and then finalize the score. The verified star level remains the same. Exceptions are if the TRS facility has CCR deficiencies that may cause the facility's certification level to be reduced. Use the Event Log to make note of the change in star level.

Which categories does the TRS staff observe and/or review during the annual monitoring visit for an accredited program?
TRS staff observes 50 percent of the classrooms, including at least one classroom for each age group. Assessors use the full assessment tool to review all applicable age group measures in Categories 2 and 4 **only**. Categories 1 and 3 are marked N/A.

Which categories and measures does the TRS staff observe and/or review during the annual monitoring visit for a non-accredited program?
TRS staff observes 50 percent of the classrooms, including at least one classroom for each age group, giving priority to new classrooms and/or teachers. Assessors use the full assessment tool to review all applicable age group measures in Categories 2 and 4. The assessor asks the director if there are program or policy changes relating to Categories 1 and 3.

Which classes does the TRS staff observe?
An assessor should observe 50 percent of the total number of classrooms (one classroom for each age group) with priority given to new classrooms and/or teachers. For example, if a site has seven classrooms, the assessor should monitor at least four of them. An example list follows:
**Total classrooms:**
- Red Room (0–12 months)
- Orange Room (12–24 months)
- Yellow Room (2-year-olds) **new classroom**
- Green Room (3-year-olds)
- Blue Room (4-year-olds) **new teacher**
- Purple Room (4–5-year-olds)
- Pink Room (school-age)

The assessor could monitor:

- Red Room (0–12 months)
- Yellow Room (2-year-olds)
- Blue Room (4-year-olds)
- Pink Room (school-age)

The example above encompasses 50 percent of classrooms, with one classroom for each age group.
Priority was given to the Yellow Room (over the Orange Room), as it is a new classroom, and Blue Room (over the Purple Room) because of the new teacher.

How are new classes treated? Are all measures observed?
Yes. All applicable age group measures must be reviewed, including classroom lesson plans. Additionally, training hours and qualifications are reviewed for new teachers.

If a facility has improved from its previous scores can the facility's star level be raised at the annual monitoring visit?
No. Star levels cannot be raised (or lowered) from an annual monitoring visit. If the facility agrees, a Star Level Evaluation can be conducted in lieu of the annual monitoring. A Star Level Evaluation is a full program assessment of all categories. If during an annual monitoring visit, the star level calculated is lower, a Service Improvement Agreement (SIA) is put in place.

Can an assessor do an annual monitoring then conduct a Star Level Evaluation?
Yes. A Star Level Evaluation can be completed in its entirety on a separate date any time before the program's certification end date. A Star Level Evaluation is a full program assessment of all categories and all classrooms.

Can an assessor do a Star Level Evaluation in lieu of an annual monitoring?
Yes. However, if the facility does not request the Star Level Evaluation before the annual monitoring visit is conducted, the assessor and director can discuss any improvements seen during the annual monitoring and then determine whether a Star Level Evaluation should occur. If it is determined that a Star Level Evaluation is warranted, the assessor would return at another time to conduct a full assessment of the program and all classrooms.

Recertification Visits

Can the recertification visit replace the annual monitoring visit, since the facility will be reassessed before its TRS end date?
Yes. The recertification visit will take the place of an annual monitoring visit for that year.

What if, due to scheduling, the recertification visit occurred a month or two before the initial TRS end date and results in a lower TRS star level than the facility initially had. May the facility keep the higher star level?
Here is an example to answer the question: A facility's TRS end date is August 31, 2020. The recertification assessment occurs June 16, 2020, and the facility receives a lower star level, effective July 1, 2020. The facility receives the new star level at the new effective date (the date recertification was conducted), and the end date is the final day of the three-year certification.

If at a recertification visit there is a "not met measure" (that is, a measure that is not corrected before the end of the day/assessment) and the facility loses certification, what is entered into CLI Engage?
The full scoring of the assessment is entered into CLI Engage and the verified star level is noted as Below 2 Star. A comment should be placed for the category where a not met measure was scored. Additionally, a Status Update event is placed in the Event Log denoting the loss in TRS certification. When TRS certification is revoked, the facility must wait six months to reapply. The facility then will apply as an initial applicant and must meet the screening form criteria for an initial applicant.

How does the assessor complete a recertification assessment for a nationally accredited facility?
The assessor will observe and assess Categories 2 and 4 for all classrooms. This assessment requires a modified recertification visit and is entered into CLI Engage as directed in the Full Assessments for Nationally Accredited facilities (Modified) section.

Nationally Accredited Facilities

What steps are taken for a newly nationally accredited facility that is already TRS certified?
For a facility that has newly received national accreditation (was not nationally accredited) their information should be updated within the School management page. A Status Update is added to the Event Log and at the facility's next visit, they are observed/assessed as a nationally accredited program.

Does a nationally accredited program receive an initial assessment?
Yes, the assessor will observe and assess Categories 2 and 4 for all classrooms. This is entered in CLI Engage as directed in the Full Assessments for Nationally Accredited facilities (Modified) section.

What if there has been a change in staff or director?

Category 1 is not observed or assessed while the facility is nationally accredited. Updates to the director are made in the School Management tab for this facility. Additionally, a General Status event may be placed in the Event Log, if desired.

How does the assessor complete a recertification assessment for a nationally accredited facility?

The assessor will observe and assess Categories 2 and 4 for all classrooms. This assessment requires a modified recertification visit and is entered into CLI Engage as directed in the Full Assessments for Nationally Accredited facilities (Modified) section.

What does an annual monitoring visit look like for a nationally accredited facility?

The assessor observes and scores all applicable facility measures for Category 4, as well as all applicable classroom measures for 50 percent of the classrooms, including one classroom from each age group, for Categories 2 and 4. These scores are entered as directed in the Annual Monitoring Visits section.

Can a nationally accredited facility lose its star level as the result of an annual monitoring visit?

No. However, if because of the visit, the facility's calculated star level is lower than its current verified (assessed) star level, the facility is placed on an SIA for Category 2, 4, or both. The facility follows the same processes for the SIA as a non-nationally accredited facility and receives an SIA assessment, which may result in a lower star level.

What happens when a facility loses national accreditation?

The assessor places a Status Update event in the Event Log describing this situation. Within three months of the loss of national accreditation, the facility receives a full assessment. This assessment is denoted as a Recertification assessment when the assessor enters scores into CLI Engage. The best practice is to mentor this facility during those three months to help the facility prepare for a full assessment visit.

What accrediting bodies are accepted by TRS?

The list of national accreditations that are recognized by TRS is in the TRS Guidelines.

What happens when a nationally accredited facility has a change of facility?

The outcome in this situation is contingent on what CCR and the facility's national accreditation body decides. A General Status event is entered in the Event Log to document the situation. If the assessor cannot determine the steps that occur after CCR and the national accreditation body have finished processing the change, the assessor sends an e-mail requesting guidance to the TRS e-mailbox at TexasRisingStar@twc.texas.gov.