

California WIOA, Title II Employment and Earnings Survey

First Quarter Program Year 2026–2027 Guidelines

This document outlines Employment and Earnings Survey requirement for California WIOA, Title II: AEFLA agencies. [Frequently Asked Questions \(FAQs\)](#) are located at the end of this document. Complete these steps using our recommended timeline in the table below.

Dates	Task	Step Reference/Notes
August	Save Exit Population for PY '25–26 – Q3'	Step 2
August	Send a survey invite to students where Exit Quarter = '25–26 – Q3'	Step 3A
August	Send a survey invite to students where Exit Quarter = '25–26 – Q1'	Step 3B
September	Re-send survey invites to students who have not responded.	Step 5
September	After three attempts, personally contact non-responders via phone, email, etc.	Step 5
October	Grace period for sending survey invites and receiving responses.	After the grace period, you will not be able to send survey invitation through TOPSpro Enterprise (TE).

Step 1: Prepare your data

Ensure all students and their attendance hours for program year 2025–2026 – Quarter 3 have been entered into TE.

Any students marked as **Retained in Program** will exit at the end of this program year. **It is not recommended to use this program status.** To check which students, have this program status:

- 1) Go to **Records, Programs**, and then **Enrollments**.
- 2) Click the small filter button in the **Program Status** column header.
- 3) Select the box for "Retained in Program" then click **OK**.
- 4) Remove "Retained in Program" status.

Next, we need to revisit the list of students who exited in the third quarter of Program Year 2025–2026 (two quarters back) by generating the Follow Up Cohort Report. In TE,

- 1) Go to **Reports, Federal Reports**, and then **Follow Up Cohort**
- 2) Select "7/1/2025 – 6/30/2026" and under Special Options select Quarter "3".

- 3) Click **Generate**. Please note the report will contain a table for “NRS Students” followed by a table for “CAEP only Students.” Both tables are unduplicated. Students in both programs will not show up twice.
- 4) Once generated, you can click **Export** in the top toolbar to export the report to Excel and/or PDF.
- 5) Review and make any necessary changes, including SSN and attendance hours, before moving on.

Step 2: Save your exit population

- 1) Go to **Tools** and then **Follow Up Cohort Wizard**.
- 2) Select program year “7/1/2025 – 6/30/2026.” Click **Next** and select quarter “3”. Click **Next** again to generate the report.
- 3) The **Follow Up Cohort** report, just like in Step 1.3, should generate. Review the report for accuracy because once the Wizard is generated, you cannot run the Wizard again for the same quarter.
- 4) Click **Next** then click **Finish** to save the list of students.
- 5) To review the results, go to **Records** and then **Students in Follow Up Cohort**. By default, the lister is filtered for **Exit Quarter** = “Two Quarters Back”. Make sure the list displaying contains students where **Exit Quarter** = “25–26 – Q3.”

Step 3A: Send a survey invite to all students where Exit Quarter = “25–26 – Q3”

- 1) Under **Records** and then **Students in Follow Up Cohort**, ensure the **Exit Quarter** column filter is set to “Two Quarters Back” or “25–26 – Q3”.
- 2) Select students from the filtered list and click the **Send Survey Invite** button in the top toolbar. Once the Survey Wizard window pops-up, click **Yes** then **Next**.
 - a. If you want to administer surveys to a specific subset of students, hold “Ctrl” key on your keyboard and click the desired student records. Otherwise hold “Ctrl”+ “A” on your keyboard to select the whole population displayed in the lister.
- 3) Review the list of students selected. If needed, you can remove students from this list by highlighting the student and selecting **Delete Selected Records**. Click **Next** after having reviewed the list.
- 4) Select a Survey Language then click **Next**.
- 5) Select a Delivery Method then click **Next**.
- 6) The next screen will provide suggested invitation delivery and expiration dates.

Select Invitation Delivery Date for Second Quarter after Exit: 8/6/2026  Select Invitation Expiration Date for Second Quarter after Exit: 11/1/2026 

- a. The first date in the first row is the delivery date for the “Second Quarter after Exit” invitations. In other words, the survey invitations that need to be sent out in the current quarter. The Invitation Delivery Date will default to today. It is

suggested to keep the default dates, but you may choose different delivery dates.

- b. The second date in the first row is the expiration date for the survey invitation for the current quarter if the survey has never been opened or answered.

Select Invitation Delivery Date for Fourth Quarter after Exit:	2/6/2027	Select Invitation Expiration Date for Fourth Quarter after Exit:	5/1/2027
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- c. The first date in the second row is the delivery date for the “Fourth Quarter after Exit” invitations. These are the automatic survey invitations that are required for the PY 2026–27 Third Quarter Employment and Earnings requirement. Again, it is suggested to keep the default dates, however you can choose another date in that first quarter.
 - d. The second date in the second row is the expiration date for the “Fourth Quarter after Exit” requirement if the survey has never been opened or answered.
- 7) On the next screen, select either “Administer without survey customization” or “Apply Survey Customization.”
 - 8) Complete the wizard.
 - 9) Repeat Step 3A until you have sent surveys to all students listed under **Records** and then **Students in Follow Up Cohort** where **Exit Quarter** = “25–26 – Q3.”
 - a. You can add the column “Has Survey Q2” to verify all surveys have been sent.

Step 3B: Send a survey invite to students where Exit Quarter = “25–26 – Q1”

- 1) If you have completed Step 3A correctly in previous quarters, survey invitations to students whose **Exit Quarter** = “25–26– Q1” will have been sent automatically. To confirm:
 - a. Go to **Records** and then **Survey Responses**. Filter for **Quarter to Take Survey** column to “26–27– Q1”.
 - b. Filter the **Exit Quarter** column for “25–26– Q1.” If surveys are present, this portion of the requirement has been completed and continue to [Step 4](#). If not, continue with Step 3B.
- 2) Return to **Records** and then **Students in Follow Up Cohort**. Filter the **Exit Quarter** column to “Four Quarters Back” or “25–26– Q1” and click **OK**. Be sure to uncheck the box for “Two Quarters Back.”. The students displayed in this list are those that exited four quarters ago.
- 3) Select students from the filtered list and click the **Send Survey Invite** button in the toolbar. Once the Survey Wizard window pops-up, click **Yes** then **Next**.
- 4) Review the list of students selected. If needed, you can remove students from this list by highlighting the student and selecting **Delete Selected Records**. Click **Next** after you have reviewed the list.
- 5) Select a Survey Language then click **Next**.

- 6) Select a Delivery Method then click **Next**.
- 7) The next screen will provide suggested invitation delivery and expiration dates like [Step 3A](#).
 - a. Only one row of dates will be displayed, i.e., the delivery and expiration date for “Fourth Quarter After Exit” invitations. The Invitation Delivery Date will default to today. It is suggested to keep the default dates, but you may choose different delivery date.
- 8) On the next screen, select either “Administer without survey customization” or “Apply Survey Customization.”
- 9) Complete the wizard.
- 10) Repeat Step 3B until you have sent surveys to all students listed under **Records** and then **Students in Follow Up Cohort** where **Exit Quarter** = “25–26– Q1”.

Step 4: View current quarter invitations

At this point, all survey invitations should have been sent to students.

To view the status of the survey invitations, go to **Records** and then **Invitations**. It is important to note that this lister only filters by **Quarter to take Survey** and not **Exit Quarter**. See [FAQs](#) to determine if you have completed the requirement for this quarter.

This lister will show the date the invitation was sent in the **Date to Send Invitation** column and when the invitation will expire in **Date When Invitation Expire** column. The **Was Accessed** column indicates if a student has clicked on the survey link. If the invitation has been successfully sent to the student, in the **Delivery Status** column will state “Delivered.”

To view future survey invitations, change the filter **Quarter to Take Survey** column to “26–27 – Q3”. Notice that these invitations show “Pending” in the **Delivery Status** column because the date to send the invitation is in the future.

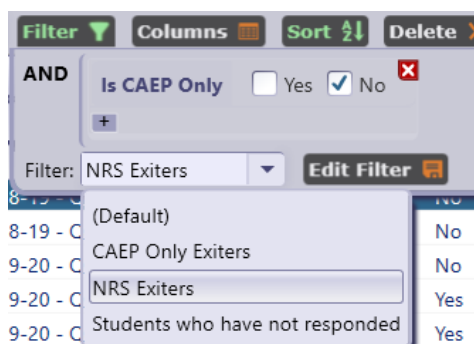
If you would like to resend a survey from this lister, select the student(s) and click the **Resend Invite** button in the top toolbar. A survey wizard will pop-up. See [FAQs](#) for more information on survey limits.

Step 5: Personally contact students who do not respond.

Use the **Survey Responses** lister to manage and manually enter survey responses. From this lister, you can **Resend Invite** or **Answer Survey** by clicking either button in the toolbar. There are similar columns as seen in the Invitations lister which were detailed in [Step 4](#).

To manage and manually enter survey responses,

- 1) Go to **Records** and then **Survey Responses**. The default filter for **Quarter to Take Survey** is set to "Current Quarter." Confirm that the list of students shown have a **Quarter to Take Survey** = '26–27– Q1.'
- 2) Next click the **Filter** button in the top toolbar. Click on the filter drop down menu and select "NRS Exiters." It may already be selected by default.



- 3) From this filtered list, select the student(s) who have not responded to the survey by filtering the **Survey Responded** column to "No."
- 4) Select a student and click **Answer survey** in the top toolbar or at the bottom of the student survey record by double clicking on a student. Manually enter responses in the student's survey which will pop-up in a separate browser.

Quarter to Take Survey: 26-27 - Q1 **Exit Quarter:** 25-26 - Q3
Delivery Status: Delivered **Survey Accessed:** No **Survey Responded:** No **Filled-in by Staff:** No
Sent to Portal On: 8/10/2026 **Updated from Portal On:** 10/1/2026
Contact Status: Not Yet Contacted **Contact Notes:** Phone kept ringing no voice mail 10/06 LA kept ringing 10/13 TM; Phone kept ringing no vo

Survey Items

Item Responses	#	Item Name	Item Prompt	Was Answered	Answer
	1	Different School Attendance	Are you attending school in a different area?	☐	
	2	School Name	What school do you attend now?	☐	
	3	Labor Force Status	Do you have a job now?	☐	
	4	Monthly Income	How much do you usually earn in one month?	☐	

Student

Full Name: Jacklin Leann Newman **Email:** N/A
Phone: (209)555-98546 **Cell Phone:** (209)555-98546

Interact with Student Portal **Answer survey** **Get item responses**

- 5) Once you have completed the survey, click **Get Item Responses** in the student's survey record to populate the Survey Items table.
- 6) Also in the Student's Survey record, staff can manage survey's using the **Contact Status** or **Contact Notes** fields.

- 7) To edit survey responses, select the student whose survey you are trying to edit. Click on **Answer Survey**. Click on **Edit Survey** and put in new answers. Return to TE and click **Get Item Responses** under the student's survey information.
- 8) You can also add "Survey Answer Employed" and "Survey Answer Quarterly Wage" columns to Survey Responses lister where Survey Name = "NRS Core Employment and Earnings Follow-up Survey" to view all responses on the main lister.
- 9) Continue until all students have responded to the survey. See [FAQs](#) to determine if you have completed the requirement for this quarter.

Frequently Asked Questions (FAQs)

Question: Why can't I find the Core Performance Report, Core Performance Wizard, and Core Performance Students lister?

The Core Performance Report has been renamed to the Follow Up Cohort Report, the Core Performance Wizard will appear as the Follow Up Cohort Wizard, and the Core Performance Students lister is now the Students in Follow Up Cohort lister. These name changes have occurred to align with the terminology used by the NRS. Despite the name change, all these features can be found in the same location in TE.

Question: How do I know if I have completed the quarterly deliverable requirement?

You will know you have completed the deliverable requirement if both exit populations have been surveyed for that quarter. For this deliverable requirement, under **Records** and then **Survey Responses** filter **Quarter to take Survey** column for "26–27 – Q1". If the **Exit Quarter** column has both "25–26 – Q1" and "25–26– Q3" surveys, then you have completed the requirement.

Question: How can I export the employment and wage data obtained from the survey by student?

You can add "Survey Answer Employed" and "Survey Answer Quarterly Wage" columns to Survey Responses lister (**Records > Survey Responses**) where **Survey Name** = "NRS Core Employment and Earnings Follow-up Survey". Also from the Survey Responses Lister, you can click **Export** in the top toolbar then **Export by Student Survey Items**.

Question: Our agency is also CAEP funded. What about the CAEP requirements?

The steps in this document also fulfill the requirements for CAEP. Following up with CAEP-only exiters is currently optional. If you would like to review the results of your

CAEP exiters, go to **Records** and then **Survey Responses**. Click the **Filter** button in the top toolbar. Click on the filter drop down menu and select “CAEP Only Exiters.”

Question: I sent my all the surveys, but they all aren’t showing on the Surveys lister? Why is this?

The Survey Responses lister by default only shows “NRS Exiters.” In **Records** and then **Survey Responses**, click the **Filter** button next to your agency. Click on the drop-down menu and select “CAEP Only Exiters.” The CAEP only survey records will appear. Review your filters as they might have changed. [Step 5.2](#) for a screenshot of the Filter drop down menu.

Question: Is there a limit on the number of survey invitations we can send to students?

For text messages, there is a limit of 3 invitations per student per quarter. There is no limit for emails.

Question: Does the text message get sent to the “phone” or “cell phone” number?

TE will try both “phone” and “cell phone”. If the first attempt fails, TE attempts the second number available.

Question: What is the default email the survey is sent from?

The survey by default is sent from survey@casas.org

Question: What is the default phone number the survey is sent from?

The survey is sent from short code “66395”.

Question: I made a mistake entering a student’s survey. How can I fix it?

To edit survey responses, select the student whose survey you are trying to edit. Click on **Answer Survey**. Click on **Edit Survey** and put in the new answers. Return to TOPSpro Enterprise and click **Get Item Responses** under the student’s survey information.

Question: When do we contact students who do not respond to the survey?

You may contact students during the quarter in which you are sending survey invitations to them, and up to one month after the current survey quarter ends.

Question: It’s past the data submission due date. My Program Specialist is telling me I haven’t completed the requirement. I thought I did. What now? I’m getting errors.

You will need to contact the CASAS Technical Support Staff to assist. TE no longer allows you to use the student portal to send surveys. CASAS staff will manually create

student survey records for the missed surveys, and you will have to personally contact and manually enter responses for all students on the list before the requirement is marked as complete.

Question: We are directly contacting students. Do we still need to do the steps above?

Yes, you will still need to do the steps above to create individual survey records under **Records** and then **Survey Responses**. Once the surveys are on this lister, you can enter any responses by clicking **Answer Survey** in the tool bar.

Question: Can I use the 'Resend Invite' button after the grace period?

No. TE no longer allows you to use the student portal to send surveys. Agency staff will need to contact students directly and then enter responses manually.

For additional information on the Employment and Earnings Requirement, please see the [California Employment Follow Up Survey](#) page on the CASAS website.