FWCA Intake Request Evaluation Reference

Following is a process outline and guidelines to reviewing tasks submitted through the FWCA Support Request form.

Purpose

The purpose of the FWCA request form is to streamline intake of requests so that the correct information is provided for the team to accomplish them efficiently and correctly. Consolidating requests in the FWCA Project Planner enables everyone to see who is assigned to projects, track their status/progress, and find files associated with a project. Including links to relevant files in the task card helps team members working on projects to return to projects without hunting for information. It also provides valuable data that will accumulate over time to show the work the team is doing and build a case for additional needed resources.

Intake Process: Team Perspective

Direct Customers to Intake Form

For any type of request, team members should *encourage* customers to use the FWCA Support Request form. This is a change from previous, more casual requests made in the flow of work and some people may need to understand why they cannot just task you with something. It is part of our jobs to help them understand. Use neutral/positive language and provide a reason and support for the change to encourage its use:

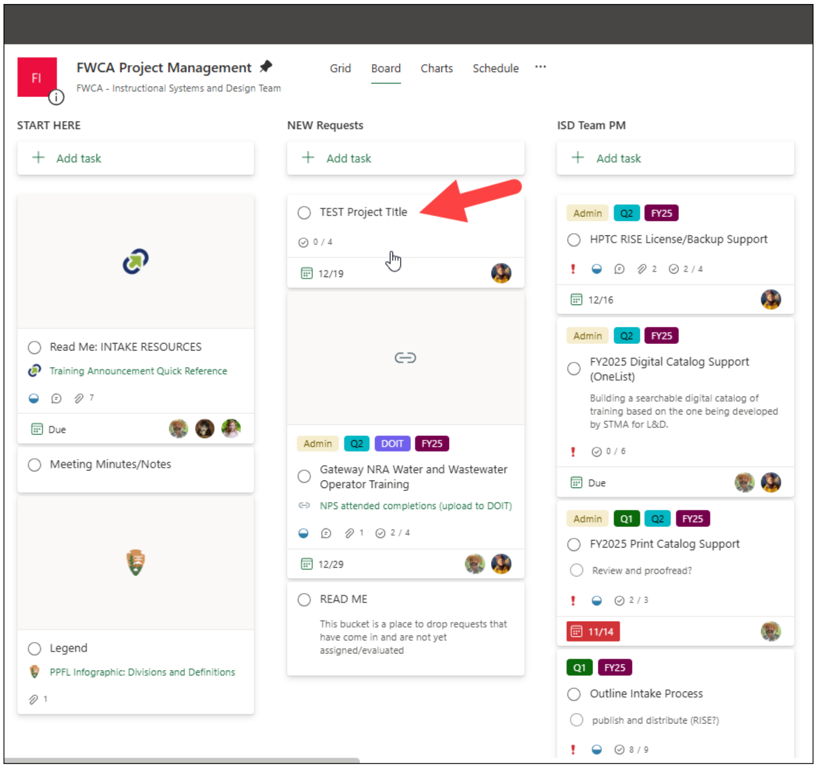
- "I understand you need [X] from us. We are tracking all requests through an Intake form so that we can handle them more efficiently and ask that you submit the request HERE."
- If you know the nature of their request, provide them any materials up front that will help them (and you):
  - See the Read Me: INTAKE RESOURCES card on the FWCA PM Planner for links to resources like Accessibility self-checks, Course Creation Quick Reference, and Training Announcement checklist and provide the resource the customer needs to help them prepare or make their request.
- IMPORTANT! If someone is proposing development of a new training, avoid offering any "solutions" and encourage them to provide their information through a request. The goal of any new training is to understand the challenges underlying their request, before offering any "solutions." Analysis of their request should reveal the best solutions.

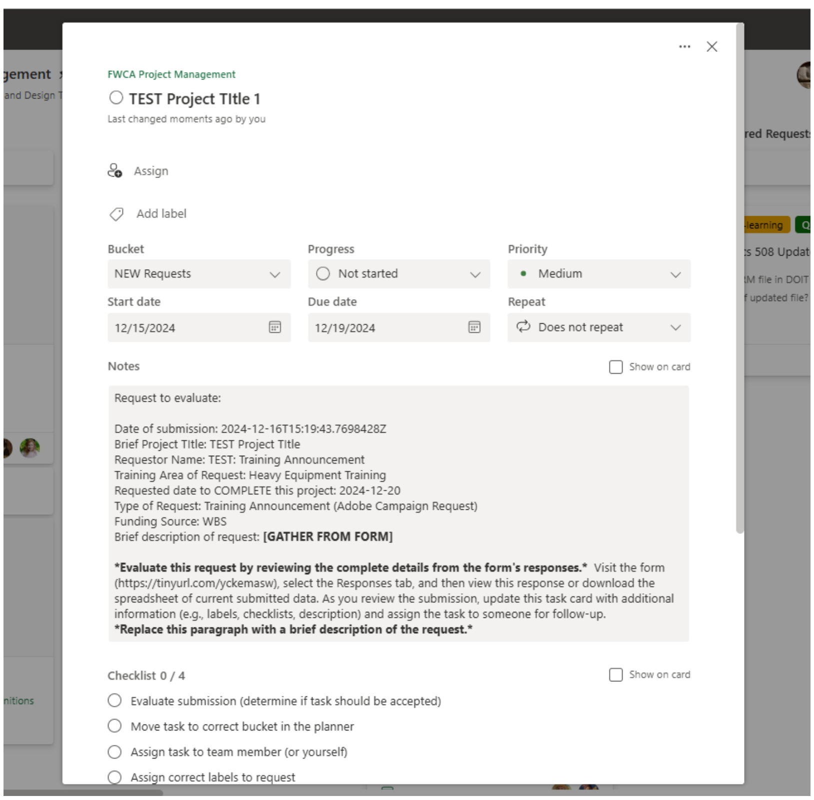
Intake Form Workflow

FWCA support requests are processed as follows:

1. Customer submits request through form.
2. Task is created in the Planner under the NEW Requests bucket:
   a. Working title and some *basic information* are pulled from the form: *date requested, area and type of request, requestor name.* (More information is likely provided in the form response.)

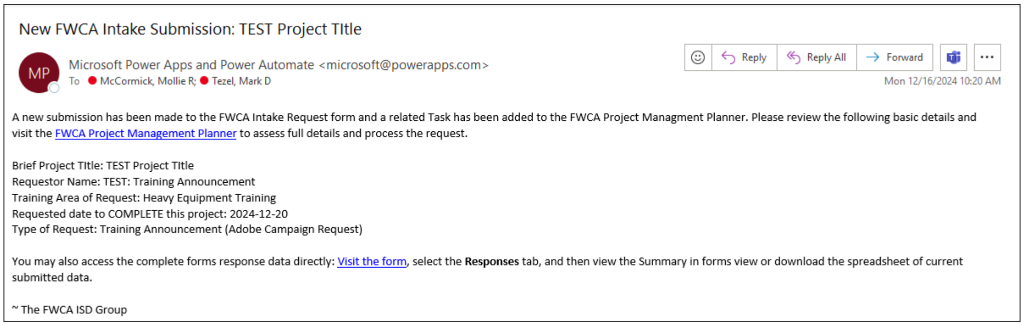
3. Training Manager (TM; Mark or Mollie) are auto-assigned the task.





NOTE: reminder to evaluate the request is included on each new card.

4. Training Manager (TM) receives an email notification of a new task added to the planner.



New FWCA Intake Submission: TEST Project TItle

Microsoft Power Apps and Power Automate <microsoft@powerapps.com>
To McCormick, Mollie R; Tezel, Mark D

Reply | Reply All | Forward

Mon 12/16/2024 10:20 AM

A new submission has been made to the FWCA Intake Request form and a related Task has been added to the FWCA Project Managment Planner. Please review the following basic details and visit the [FWCA Project Management Planner] to assess full details and process the request.

Brief Project TItle: TEST Project TItle
Requestor Name: TEST: Training Announcement
Training Area of Request: Heavy Equipment Training
Requested date to COMPLETE this project: 2024-12-20
Type of Request: Training Announcement (Adobe Campaign Request)

You may also access the complete forms response data directly: [Visit the form], select the **Responses** tab, and then view the Summary in forms view or download the spreadsheet of current submitted data.

~ The FWCA ISD Group

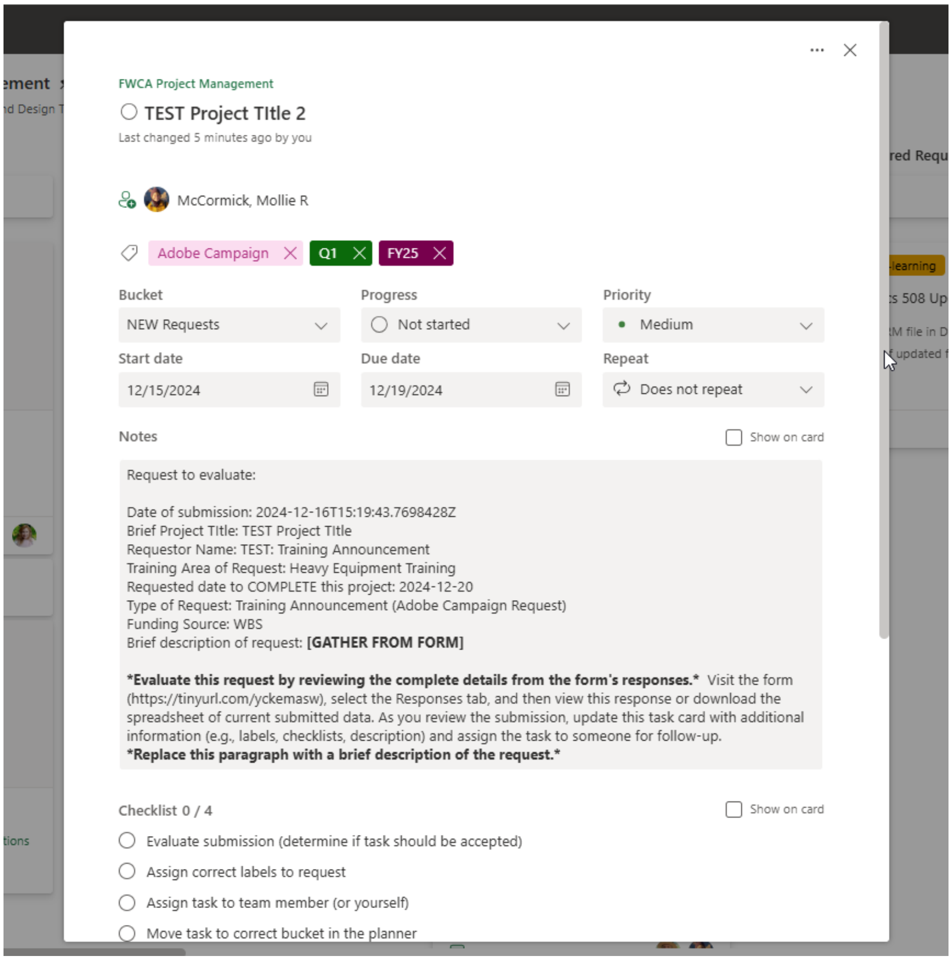
Next step: evaluate and assign the task.

Evaluating Requests: Training Manager Level

The TM should evaluate each request to determine the feasibility of accepting the request, considering its level of effort and who may accomplish it in the timeframe requested (or with a revised timeframe). *It is important that someone with Team oversight make this initial evaluation, for them to understand what the team is being asked to accomplish.* Steps for assignment level evaluation include:

1. Review the provided information and the entire response in the Forms responses:
   a. Follow the link to [Review Form Responses]
   b. Select **Responses** (tab) > **View results** (button) and use arrows to navigate to the results for the NEW Request (new requests are added to the end of the list).
   c. While reviewing the information, add any basic additional information to the task card: POC, brief description of the request, etc. (e.g., **note in bold text at bottom of card**)
2. Assign basic labels to the task: Type of request, FY year and quarter.
3. Adjust bucket (training area) for the request and priority. (NOTE: All tasks come in at Medium Priority.) (One assigned to a bucket, the task will appear under that bucket going forward.)
4. Assign task to team member.
5. If helpful, add basic steps in the checklist for completion or links to any useful info (not provided in the request) under Attachments (e.g., previous curriculum content) and/or Comments about the request to help the team member move forward. *Every comment will be sent as an email to assigned team members.*

NOTE: These basic steps are included in the Task checklist as a reminder; check them off as you complete them.



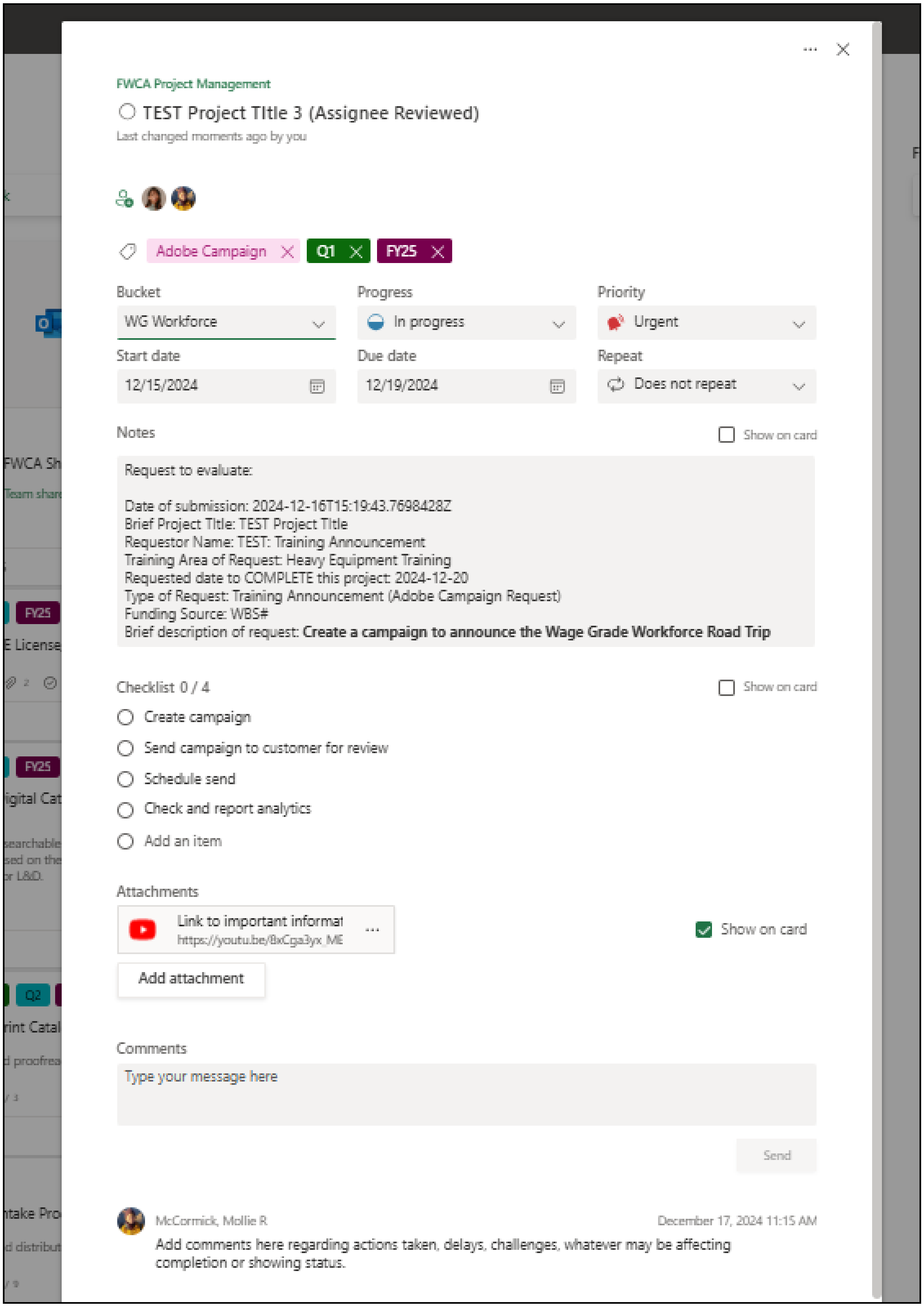
Evaluating Requests: Assignee Level

Once assigned a request, the team member should evaluate the request fully for themselves and ensure all provided information is added to the card. After receiving an email that a task has been assigned to you:

1. Review the provided information and the entire response in the Forms responses:
    a. Follow the link to [Review Form Responses]
    b. Select **Responses** (tab) > **View results** (button) and use the right/left arrows to navigate to the results for your NEW Request. TIP: New requests are added to the end of the list, scroll all the way to the right.
    c. While reviewing the information, add any additional information to the task card: POC, brief description of the request, etc. (e.g., **note in bold text at bottom of card** AND clean up card to leave only the relevant info)
2. Adjust/add any labels for the task: Type of request, FY year and quarter, area of request (DOIT or EDOIU), type of training, etc.
3. Mark the Progress as **In Progress.**
4. Add to checklist any tasks to be completed for the request and remove anything not relevant.
5. Add under Attachments any assets provided in the form response or links to courses, content, etc., relevant to the request.

6. Create a project in the FWCA Project SharePoint as follows:
    a. Navigate to the Documents > 01 – Active Projects > A01_Project Name [MASTER] folder.
    b. Locate and copy the MASTER folder marked "Project Title [MASTER -- COPY and RENAME]"
    c. Navigate to the folder that corresponds with your training area.
    d. TAKE ONE of TWO ACTIONS:
        - Search for an existing project folder for your project (especially if a Training Announcement or Admin [roster/registration] update.
        - If no folder exists, paste the copied MASTER folder set into the Training Area folder, then rename the folder to your working project title.
    e. Consider the subfolders for your assignment and paste any assets in the folders as appropriate.
    f. Provide a link to the Active Project folder in the Task Card of the Planner for your project.
    g. If you are creating a NEW training product (e.g., new e-learning or classroom course that you or a contractor will develop), create a OneNote for the project and save it to the Project Folder, then link to it from the Task card in Planner.
        - Sections of the OneNote may include: Contacts, Meeting minutes, Design Decisions, Resources and Assets (customer provided content), Questions (to be answered), or whatever is relevant to your projects.
        - The OneNote should be the central location for gathering information for a long-term project. It may be shared with other team members to collaborate on a project.

— CONTINUE TO REVIEW TASK CARD POPULATED BY ASSIGNED TEAM MEMBER —


FWCA Project Management
TEST Project TItle 3 (Assignee Reviewed)
Last changed moments ago by you
Adobe Campaign
Q1
FY25
Bucket
WG Workforce
Progress
In progress
Priority
Urgent
Start date
12/15/2024
Due date
12/19/2024
Repeat
Does not repeat
Notes
Show on card
Request to evaluate:
Date of submission: 2024-12-16T15:19:43.7698428Z
Brief Project TItle: TEST Project TItle
Requestor Name: TEST: Training Announcement
Training Area of Request: Heavy Equipment Training
Requested date to COMPLETE this project: 2024-12-20
Type of Request: Training Announcement (Adobe Campaign Request)
Funding Source: WBS#
Brief description of request: Create a campaign to announce the Wage Grade Workforce Road Trip
Checklist 0 / 4
Show on card
Create campaign
Send campaign to customer for review
Schedule send
Check and report analytics
Add an item
Attachments
Link to important informat
https://youtu.be/8xCga3yx_ME
Show on card
Add attachment
Comments
Type your message here
Send
McCormick, Mollie R
December 17, 2024 11:15 AM
Add comments here regarding actions taken, delays, challenges, whatever may be affecting completion or showing status.

Requests From Outside the Intake Process

If you are working a project that was assigned before the Intake Process began, document the project in one of these ways:

- Add a card to the Planner, copying one of the existing tasks and assigning it to yourself, updating it with all of the relevant information and links OR
- Use the form to enter the project request into the system, then follow the process outlined above to complete documentation and place files on the FWCA Project folders.

Documenting Project Work

As noted above, it is important to document and save work to the FWCA SharePoint as you work a project. This ability to “tell the story” of how/what work is being accomplished will have several benefits:

- One location for the TM to gauge the workload of the team and distribute resources.
- Ability to track work with reminders and gauge hours for project completion and timekeeping per organizational requirements.
- Ability to gather and report data on how resources are being applied/used (and what more the team may need).
    - MS Forms data and Planner data
    - Filter capabilities to isolate and aggregate data as needed
- Provides data to gauge the resources and level of effort for each quarter of the fiscal year.
- Will enable team members to see their accomplishments and support their Performance Review write-ups.
- Backup of relevant information for any FOIA requests that may arise.

Documentation Best Practices

Following are some suggested best practices for documentation across all workflows and request types.

- Save and backup files to the FWCA Project folders:
    - As you work a request, save files to your OneDrive and periodically (at least weekly) set aside time to sync them to the FWCA Project folder.
    - If you anticipate being out of the office or offline for more than a day, backup working files to the FWCA Project folder.
- Update task card as you work a request:
    - Add comments to note meetings held or actions you have taken (contact with customer, key decisions or delays [e.g., DOIT is down until X date OR customer is reviewing for 2 weeks], next steps)
    - Add actions (high level) to the checklist as they arise (“show your work”) and check them off as completed.
    - Update “Progress” or deadlines as needed.
    - Add links or attachments as necessary (e.g., when some new content is provided or deliverable is made – such as the final DOIT course link.
- Provide links to final product on the card and mark Completed when resolved + ensure that final (source) files and deliverables are in the Project Folder.

    - TM: When a project is marked COMPLETE, review the FWCA Project Folders to check that all files are present and backed up.
- Cleanup your OneDrive and the FWCA Project folder to archived/removed any files not relevant for archiving or needed for future reference/updates.

General Workflow

Each request should be resolved following a basic workflow of evaluation, customer engagement, resolution, documentation, and closeout.

1. Evaluate assigned request/task.
2. Contact customer within 2 business days (even if only to acknowledge or gather additional info).
3. Resolve the request through appropriate action, adding comments for any notable decisions/issues.
4. Document work by saving any attachments to the project folder and linking to task card.
5. Closeout by notifying customer of completion and mark date of completion (then update progress to Complete).

Specific Workflows

Administrative Support (Rosters / Registration)

Requests for help uploading completion rosters or with course registrations. Follow the general workflow as outlined and

- Use this job aid and template for roster uploads to DOIT.
- Encourage requestors to enter their student's emails to the template (provide it when they make a request), if they only have student names on paper.

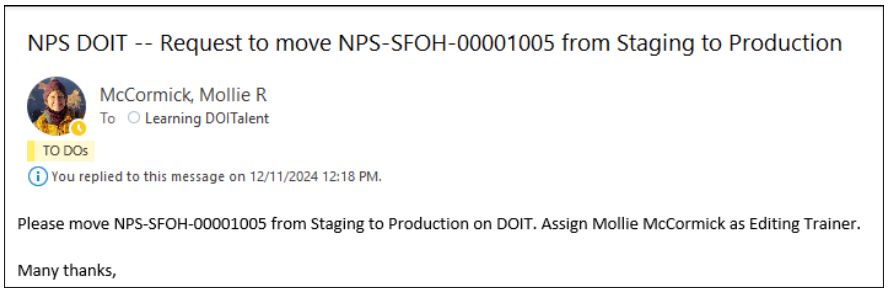
Training LMS Support

Requests to create a course shell in DOIT / EDOIU or to address course issues. Follow the general workflow as outlined and take steps specific to the request.

Course Shell Build Requests

- Check if requestor provided the completed required forms with their request: LMS Course Creation Request and Content Verification Agreement.
    - If not provided/completed, ask the customer to fill them out (or work with them to complete each):
        - LMS Course (Shell) Creation Request: https://tinyurl.com/2j5du7e8
        - Content Verification Agreement (CVA): https://tinyurl.com/3ep8bsb3
- If course is not yet built on staging, build the training shell per the request. Consult the LMS shell stylesheet to include required elements for course shell builds. Per L&D Operations' guidelines, shells must include:
    - [ ] Title
    - [ ] Course code (assigned by DOIT Team)
    - [ ] Description
    - [ ] Audience Identified
    - [ ] Learning Objectives
    - [ ] "How to" *navigate* and *complete* the training

    - Who to contact for help or about content
    - Evaluation (using new DOIT questions that align with Ops Evaluation strategy)
- Submit the Course Request and CVA through the Operations online Course Request Worksheet (transferring the info provided in the Course Request document completed with the customer). *Operations will assign the training a course code and notify you by email.*
- Add the course code to the course shell on staging.
- Provide capture for customer review prior to request for moving to LIVE.
- Email learning_doitalent@ios.doi.gov to move the course from Staging to Production. Be sure to include NPS and the target LMS as well as the course code in your Subject line and body of the email.
- Also request that you be made Editing Trainer as well as any additional people who should have edit rights to the course. *It is a good best practice to include the TM as an editing trainer on all courses.*



- *NOTE: Complete documentation of the LMS Course Creation Process is available on the L&D Operations sharepoint page.*

Training Announcement (Communications Request)

TBD – work with Kathy

Training Development (New or Revised) Support

TBD – build out with ADDIE and LE frameworks.

Presentation Support

Requests to help develop a presentation (e.g., webinar or PowerPoint).

Key Considerations and resources of these requests are:

- Requests for interpreters or producers.
- Accessibility (508 compliance).

Accessibility Support (Guidance with 508 Compliance)

TBD – provide resources

Video Direction/Production Request

TBD – work with Emma