**LWDA:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ **Name of Reviewer:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Period Reviewed:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ **Date(s) of Review:**  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Complete the A/DW/TAA Program Review Guide using information gathered during the full review. If there are Findings regarding compliance issues, the reviewer must identify the basis for the Finding, e.g., observations, interview, LWDB policy, intake documents and/or participant records. Such documentation must be retained in the monitoring file (electronic and/or hard copy file). Reviewers must determine if a non-compliance issue is due to a specific individual, isolated factor or is a systemic problem that is inherent in the LWDA program operations. This will help to identify potential technical assistance and courses of action.

**Submit this guide and the draft Program Review Letter to QA Manager for review.**

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| **Policy** - Review LWDB policies to determine compliance with WIOA, federal / state guidance. Policies do not have to be standalone; related policies may be combined. Review the LWDB local plan for any policies. (Note: As of the development of this guide, a listing of required policies is being developed by NYSDOL Policy Unit. This list will be used once finalized / released to the LWDBs. Users must always check for the most current guidance prior to conducting a review.)  |
| **Required Policies** | **Comments** State if policy is compliant/noncompliant with the guidance listed or if LWDB does not have a policy. For any noncompliant / missing policy provide a detailed explanation. Answer any questions from left column.  |
| 1. Initial Assessment (IA)

TA 08-4.2 requires LWDAs have IA written processes/procedures |  |
| 1. Priority of Service

WIOA §134(c)(3)(E), 20 CFR 680.210(d), 20 CFR 680.600-640, TA12-12.4, Local Plan |  |
| 1. Individual Training Account (ITA)

20 CFR 680.200 - .230, 20 CFR 680.300-.350, TEGL 19-16, TA 09-02.1 |  |
| 1. Economic Self-Sufficiency

WIOA §134 (d)(1)(A)(x), 20 CFR 680.210, 680.710(a), TA 15-3 |  |
| 1. Supportive Services 20 CFR 680.900-970
 |  |
| 1. Eligible Training Provider List (ETPL)

20 CFR 680.400-530, TA 18-2.2 |  |
| 1. Follow-Up TEGL 19-16
 |  |
| 1. Securing & Protecting Personally Identifiable & Sensitive Information (PII & PPSI)

20 CFR 683.220, TEGL 39-11, TA 18-5 |  |
| 1. LWDB Monitoring

WIOA §107(d)(8), 20 CFR 683.410, TA 04-19 & TA 05-15  |  |
| 1. Does the monitoring policy/plan provide a schedule detailing the timeframes for each type of monitoring of subrecipients?
 |  |
| 1. Does the monitoring policy/plan identify who (by position and name), or what agency will perform the monitoring activities?
 |  |
| 1. Does the policy/plan identify the subrecipients that will be subject to oversight and monitoring annually? (e.g. subrecipient counties, contracted providers, etc.)?
 |  |
| *Note: The policies below with an asterisk are only required if LDWB offers the service.*  |
| 1. *\*On-the-Job Training (OJT)\**

20 CFR 680.200-230, 20 CFR 680.700-750, TEGL 19-16, TA 10-15.2 |  |
| 1. \**Customized Training*\*

20 CFR 680.200 - .230, 20 CFR 680.760-770, TEGL 19-16, TA 01-05.1 |  |
| 1. \**Incumbent Worker*\* 20 CFR 680.780-820
 |  |
| 1. \**Work Experience\** (including Internship / Transitional Job Career Services)

20 CFR 680.180-195, TEGL 19-16 |  |
| **NYSDOL Policies LWDBs must implement** | **Comments** Describe how the LWDB has implemented the TA requirements / answer any questions from left column. |
| 1. Disruptive Customer Policy TA 10-17
 |  |
| 1. Processing Non-Criminal Complaints/Grievances under Title I of WIOA TA 18-4, 20 CFR 683.600
 |  |
| 1. Equal Opportunity and Nondiscrimination Complaint Processing Procedures [DEOD 01-1](https://www.labor.ny.gov/formsdocs/deod/deodformsandpublications.shtm)
 |  |
| 1. Functional Alignment Staff Oversight and Supervision

TA 15-12 |  |
| 1. Veterans’ Priority of Service for Covered Persons

20 CFR 680.650, TA 12-12.4. |  |
| 1. Does the LWDA have procedures in place to identify veterans at intake (e.g., use of [Military Service Questionnaire (MSQ)](https://labor.ny.gov/VETs/PDFs/ES50.pdf)?
 |  |
| 1. Is the veteran priority of service posted on the website?
 |  |
| 1. Is there veteran priority of service signage?
 |  |
| **LWDB Additional Implemented Program Policies** | **Comments**Are the LWDA policies compliant? |
|  |  |
|  |  |
|  |  |
| **Policy Summary Questions** | **Comment on the questions** |
| 1. Does the LWDA have all required policies?
 |  |
| 1. Are the policies compliant with WIOA and current federal and state guidance?
 |  |
| 1. Do any policies need to be revised?
 |  |
| 1. How are policies provided to program staff (e.g., local website, internal system/server, hard copy, e-mail)?
 |  |
| 1. Have the requirements of the TAs been implemented in the LWDA?
 |  |
| 1. Additional Information - Describe any other policy related issues disclosed during the review, if any.
 |   |

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| **Performance -** To determine if local performance goals were achieved, actual performance outcomes will be compared to the LWDB’s adjusted goals after the close of the program year. The unsatisfactory performance threshold is an outcome-to-goal ratio of less than 80% per indicator for a program year. NYSDOL Central Office provides the local performance reports and will notify a LWDA when a performance indicator is failed. [WIOA Primary Indicators of Performance](https://www.labor.ny.gov/workforcenypartners/wioa/wioa-performance.shtm) and TA in effect during the PY(s) under review. |
| **Performance** | **Comments** |
| 1. How does the LWDB and AJC managers ensure staff understand the Primary Indicators of Performance and Local goals?  *Briefly describe*
 |  |
| 1. What operational processes are in place to achieve the goals?  *E.g., quarterly partner meetings, participant follow-up, review of Individuals in the Credential Measure to check data entry.*
 |  |
| 1. In the most recently completed PY, did the LWDA fail to achieve at least 80% or above of the negotiated level of performance for an indicator? *Yes or No or N/A (if final report has not been issued for the period under review)*
 |  |
| a. If yes, state which indicator(s).  |  |
| 1. Did NYSDOL’s Policy Unit require the LWDB to develop a PIP for unsatisfactory performance of an indicator in a PY under review?
 |  |
| a. If yes, what is the status of the PIP? *(e.g. under development, submitted to central office, implemented)* |  |
| 1. Has NYSDOL provided technical assistance? If yes, describe *(This may include assistance in the development of the PIP and/or other actions designed to assist the LWDA in improving performance.)*
 |  |

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| **Monitoring** – 20 CFR 683.410, TA 04-19, WIOA §107(d)(8), 20 CFR 679.370(i)LWDBs are required to conduct program oversight (*monitoring*) of WIOA A/DW employment and training (E&T) activities. Evaluate the LWDB oversight conducted and evaluate for effectiveness / completeness.Review local monitoring policy, plan, monitoring reports and if required any corrective action. Answers here should be more than Yes/No. |
| 1. Was at least one annual on-site monitoring review for each subrecipient or fiscal agent/grant recipient if also providing services conducted for the PY under review? List here what monitoring was completed on which sub recipients.
 |  |
| 1. Was monitoring completed as outlined in the LWDB monitoring policy (i.e., frequency, schedule, and type)? List here what monitoring was to be completed and compare to what was completed in answer #1. Was all monitoring conducted as required?
 |  |
| 1. Are monitoring reports/letters issued to the subrecipient or fiscal agent/grant recipient if also providing services and the LWDB within 30 days after the monitoring was completed? List here when the letters were issued and to whom, as well as for what period.
 |  |
| 1. Are reports/letters issued within the required timeframe stated in the Technical Advisory and the LWDB policy?
 |  |
| 1. Are the reports/letters issued comprehensive, providing details of any Findings and corrective actions?
 |  |
| 1. Is there follow-up to ensure corrective action resolved any Findings identified? *(if applicable)* Identify the follow up provided here.
 |  |

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| **Participant Eligibility -** Determine if the LWDA program adheres to eligibility requirements when enrolling participants. Review applicable policies, procedures, participant records and tool(s) the LWDA program may have developed to support accurate eligibility documentation by staff, such as a checklist or desk reference. [TA 11-12.2](https://labor.ny.gov/workforcenypartners/ta/TA11-12.2.pdf) Attachment A, 20 CFR 680.120 - .130, 680.210, WIOA §3(15), Trade Act of 1974 as amended in 2002, 2009, 2011 |
| 1. Are LWDA A/DW/TAA programs adhering to eligibility requirements when enrolling participants? Yes [ ]  No [ ]
 |
| 1. Were all participants sampled determined to meet eligibility requirements for the program(s) from which they received services? Yes [ ]  No [ ]  N/A [ ]
 |
| 1. If any participants were found not eligible, was this an isolated occurrence? Yes [ ]  No [ ]  N/A [ ]
 |
| Explain any ‘no’ responses.If errors or omissions are identified, note the specific exceptions and advise the grant recipient to re-verify the eligibility of any participant in question.  |
| **A/DW/TAA Participant Record/DEV Worksheets -** [TA 11-12.2](https://labor.ny.gov/workforcenypartners/ta/TA11-12.2.pdf), [TA 10-3.1](https://labor.ny.gov/workforcenypartners/ta/ta10-3-1_AdditionalParticipantDemographicInformation.pdf), [PIRL](https://www.doleta.gov/performance/reporting/), [TA 17-7](https://labor.ny.gov/workforcenypartners/ta/ta-17-7.pdf), [TEGL 07-18](https://wdr.doleta.gov/directives/corr_doc.cfm?DOCN=4255) Joint Source Documentation, 20 CFR 680.600, [TEGL 22-15](https://wdr.doleta.gov/directives/corr_doc.cfm?DOCN=3959) Attachment A: Source Documentation Requirements *(At the time of guide development, TEGL 22-15 is active, USDOL ETA is issuing further WIOA guidance.)* |
| Compile information from the A/DW/TAA Participant Record/DEV Worksheets and outline below any data entry and documentation issues resulting from the A/DW/TAA Participant Record/DEV review. For any potential findings of compliance issues, provide evidence, e.g., record examples, observations and documents supporting the finding.For all items consider the following – * **Is the data accurately entered in participant’s OSOS record based on instructions in the OSOS User Guides?**
* **Is each element reported in OSOS documented with an allowable source?**
* **Is there consistency between the OSOS record data (e.g., employment status, work history, single parent), OSOS Comments and documentation?**

*For example, Comments state participant was laid-off from most recent employment, but Work History tab shows no end date for the employment.** **Are Measurable Skill Gains and credentials being properly data entered, with OSOS Comments? If supplemental wage data is being collected for participants not included in wage reporting, (e.g., no SSN #) is all required data being collected?**
* **If documentation is insufficient, determine if it is a systemic issue, or an isolated occurrence.**
* **Is AJC staff following all LWDB policies?**
 |
|  |
| **DW Eligibility** - [TA 11-12.2](https://labor.ny.gov/workforcenypartners/ta/TA11-12.2.pdf) Attachment A and B; [TEGL 19-16](https://wdr.doleta.gov/directives/attach/TEGL/TEGL_19-16_acc.pdf); [WIOA §3(15)](https://www.congress.gov/113/bills/hr803/BILLS-113hr803enr.pdf) |
| Compile information from the Dislocated Worker Eligibility Worksheets and outline below any data entry and documentation issues. For any potential findings of compliance issues, provide evidence, e.g., record examples, observations and documents that support the finding. |
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| **TET NDWG Eligibility** - [TEGL 2-18](https://wdr.doleta.gov/directives/attach/TEGL/TEGL_2-18_acc.pdf); [Trade and Economic Transition DWG OSOS Guide](https://labor.ny.gov/workforcenypartners/osos/Trade-and-Economic-Transition-DWG-OSOS-Guide.pdf); [TEGL 2-15](https://wdr.doleta.gov/directives/corr_doc.cfm?DOCN=4439)Must provide comments or an explanation for any deficiencies. |
| 1. Is training provided in line with the contractor’s proposal and the budget on the NOA? Yes [ ]  No [ ]
 |
| 1. Is training funded in OSOS with TET NDWG 2018 funds? Yes [ ]  No [ ]
 |
| 1. How many TET NDWG participants were expected to be served?
 |
| 1. How many participants have actually been served to date?
 |
| 1. If actual served is less than planned, do they have a strategy to serve additional participants prior to the lapse date of the grant? Yes [ ]  No [ ]
 |
| Explain any ‘no’ responses or discrepancies. |
| **Opioid NDWG –** [TEGL 4-18](https://wdr.doleta.gov/directives/corr_doc.cfm?docn=7230); [TEGL 2-15](https://wdr.doleta.gov/directives/corr_doc.cfm?DOCN=4439); [Opioid Crisis Dislocated Worker Grant OSOS Guide](https://labor.ny.gov/workforcenypartners/osos/Opioid-Crisis-DWG-OSOS-Guide.pdf)Must provide comments or an explanation for any deficiencies. |
| Participant Numbers (Opioid NDWG Subrecipient Agreement)1. Number of Projected Participants to be served? *How many participants were enrolled vs the proposed number of participants in the agreement*?
 | **Planned** | **Actual** |
|  |  |
| 1. Number of Projected Participants to participate in Disaster Relief Employment? *How many participants participated in Disaster Relief Employment vs the proposed number of participants in the agreement.*
 |  |  |
| 1. Number of Projected Participants to participate in Employment and Training Activities, including Supportive Services? *How many participants participated in Employment / Training Activities vs the proposed number of participants in the agreement.*
 |  |  |
| Is only the following question being used to screen for potential Opioid customers: *“Your answer to this question is voluntary. Do you, a friend, or any member of your family have a history of opioid use? Please answer “Yes” or “No.”* Yes [ ]  No [ ]   |
| Verify how the LWDB is inquiring about each participant’s Opioid Grant eligibility? (Included in WIOA registration form or asked during assessment interview?) [TEGL 2-15](https://wdr.doleta.gov/directives/corr_doc.cfm?DOCN=4439) *If information is gathered on a form, obtain copy for file.*Explain \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |
| Were all participants determined eligible as a dislocated worker in OSOS? Yes [ ]  No [ ]   |
| Are career services offered to eligible participants as outlined in the Subrecipient Agreement?Yes [ ]  No [ ]  |
| Are supportive servicesoffered to eligible participants as outlined in the Subrecipient Agreement? Yes [ ]  No [ ]  |
| Did customers who received training services receive training in an allowable field: Yes [ ]  No [ ]  *Customers who did not disclose as being directly, or indirectly, affected by the Opioid crisis may only receive training in specific training fields identified to have an impact on the Opioid crisis: addiction treatment; mental health treatment (focused on conditions that lead to / exacerbate opioid addiction); and pain management services and practices the LWDB demonstrates could help reduce or avoid prescription painkiller addiction. Customers who identified as being directly or indirectly affected can be training in any field.* |
| Was Disaster Relief Employment included in the grant budget? Yes [ ]  No [ ]  N/A [ ] 1. Are the disaster relief Employment initiatives allowable under the Opioid NDWG? Yes [ ]  No [ ]
2. Are they serving the number proposed in the budget? Yes [ ]  No [ ]
3. Does the disaster relief employment match the description in the grant narrative? Yes [ ]  No [ ]
4. Were any individuals employed in Disaster Relief Employment for more than 12 months (or 2,040 hours), pursuant to WIOA §170(d)(3)(A). Yes [ ]  No [ ]
 |
| Explain any ‘no’ responses or discrepancies. |
| **A/DW Participant ITA/OJT/Customized Training Determination Worksheets** - 20 CFR 680.210 |
| Compile all information from the A/DW Participant ITA/OJT/ Customized Training Determination Worksheets and outline below any program requirement and documentation issues. For any potential findings of compliance issues, provide evidence, e.g., record examples, observations and documents that support the finding. |
|  |
| **A/DW ITA Worksheets -** ITAs are the primary method to be used for procuring training services under WIOA. Training services provided must be directly linked to an in-demand industry sector or occupation in the LWDA or region, or in another area to which an A/DW receiving such services is willing to relocate. Except, a LWDB may approve training services for occupations determined by the LWDB to be in sectors of the economy which have a high potential for sustained demand or growth in the LWDA (see Local Plan). WIOA §134(c)(3)(G)(iii), 20 CFR 680.100(b)(2), 300-.350, .750 |
| Compile all information from the A/DW ITA Worksheets and outline below any program requirement and documentation issues. For any potential findings of compliance issues, provide evidence, e.g., record examples, observations and documents that support the finding. |
|  |
| **A/DW/TAA Non-ITA Contract Training Worksheets -** Pre-Award - WIOA §181, 20 CFR 683.260, TEGL 19-16, [TA 10-15.2](https://labor.ny.gov/workforcenypartners/ta/ta-10-15-2.pdf); Contract Assurances - 20 CFR 680.700 - .770, 680.830, 683.270, 683.275, 683.280, 683.200(g), 683.600, 683.400 - .410, WIOA §188, [TA 18-4](https://labor.ny.gov/workforcenypartners/ta/ta18-4_wioa_title_I_non-criminal_complaints_and_grievance.pdf); Certifications - WIOA §181, WIOA §188; 29 CFR Part 38, 20 CFR 683.200, .290, [TA 12-12.4](https://labor.ny.gov/workforcenypartners/ta/ta12-12-4-veterans-priority-of-service.pdf); Additional Certifications - 2 CFR 200 Appendix II, CFR Title 37. Patents, Trademarks, and Copyrights, 40 U.S.C. 3701-3708, 42 U.S.C. 7401-7671q., 33 U.S.C. 1251-1387 |
| Compile all information from the A/DW/TAA Non-ITA Contract Training Worksheets and outline below any program requirement and documentation issues. For any potential findings of compliance issues, provide evidence, e.g., record examples, observations and documents that support the finding. |
|  |
| **A/DW/TAA On-the-Job** **Training (OJT) Worksheets -** OTJ is provided by an employer to a paid participant while engaged in productive work that provides knowledge or skills essential to the full and adequate performance of the job; which provides employers to be reimbursed up to 50% of the wage rate of an OJT participant for the costs of providing the training and additional supervision related to the OJT. LWDB may increase the reimbursement rate for OJT contracts up to 75% when considering the factors contained in 20 CFR 680.730. WIOA §134(c)(3)(H)(ii); 20 CFR 680.750 - .730, TA 10-15.2 |
| Compile all information from the A/DW/TAA On-the-Job Training Worksheets and outline below any program requirement and documentation issues. For any potential findings of compliance issues, provide evidence, e.g., record examples, observations and documents that support the finding. |
|  |
| **A/DW Customized Training Worksheets -** Customized training is designed to meet the specific requirements of an employer (including a group of employers) that is conducted with a commitment by the employer to employ an individual upon successful completion of the training, and for which the employer pays for a significant cost of the training, as determined by the LWDB (in accordance with the factors identified in WIOA §3(14), WIOA §134(c)(3)(D)(xi), 20 CFR 680.710(c), 680.760 - .770) |
| Compile all information from the A/DW On-the-Job Training Worksheets and outline below any program requirement and documentation issues. For any potential findings of compliance issues, provide evidence, e.g., record examples, observations and documents that support the finding. |
|  |
| **Incumbent Worker Training (IWT) Worksheets -** IWT isdesigned to meet the special requirements of an employer (including a group of employers) to retain a skilled workforce or avert the need to lay off employees by assisting the workers in obtaining the skills necessary to retain employment. Conducted with a commitment by the employer to retain or avert the layoffs of the incumbent worker(s) trained. An incumbent worker does not have to meet the eligibility requirements for career and training services for A/DW under WIOA, unless they are also enrolled as a participant in the WIOA A/DW program. At a minimum staff need to verify DOB, Selective Service, and work history. 20 CFR 680.780 - .840 |
| Compile all information from the IWT Worksheets and outline below any program requirement and documentation issues disclosed during the review of IWT. For any potential findings of compliance issues provide evidence, e.g. record examples, observations and documents that support the finding. |
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| **Transitional Jobs (Work Experience) Worksheets -** A transitional job provides a limited work experience, that is subsidized in the public, private, or non-profit sectors for those individuals with barriers to employment because of chronic unemployment or inconsistent work history. These jobs are designed to enable an individual to establish a work history, demonstrate work success, and develop the skills that lead to unsubsidized employment. WIOA §134(d)(5), 20 CFR 680.180 - .195  |
| Compile all information from the Transitional Jobs (Work Experience) Worksheets and outline below any program requirement and documentation issues disclosed during the A/DW program review. For any potential findings of compliance issues provide evidence, e.g. record examples, observations and documents that support the finding. |
|  |
| **Pay for Performance (PFP) Contract Strategy Worksheets -** WIOA PFP contract strategy is a specific type of performance-based contract strategy that places a higher emphasis on performance outcomes and drives better results. In a PFP contract strategy, service providers are paid based on the achievement of specified levels of performance related to WIOA outcomes, rather than being paid for processes or outputs. LWDBs may use up to 10% of their funds for adult training services and/or youth activities for PFP contract strategies. Where LWDBs use PFP contract strategies, funds may be available until expended, if authorized by Congress in annual appropriations (i.e., if outcomes are not achieved as hoped, the funds may be used for another PFP purpose). WIOA §3(47), WIOA §122, 20 CFR 683.500 - .540. |
| Compile all information from the Pay for Performance Contract Strategy Worksheets and outline below any program requirement and documentation issues. For any potential findings of compliance issues provide evidence, e.g. record examples, observations and documents that support the finding. |
|  |
| **Summary of any Monitoring Findings & Corrective Actions** Ensure all relevant information regarding a finding is captured.* Make a clear, concise and specific statement describing the violation of statue, regulations, uniform guidance, policies, etc.
* State the cause, for example, what is or was the LWDA doing or not doing that resulted in the Finding.
* Identify the citation(s) (statute, regulation, and/or TA requirement) that support the Finding.
* Identify the action(s) required to eliminate the cause of the Finding.
 |
|  |
| **Summary of any Technical Assistance Observations and Recommendations**Include situations that merit attention because they negatively impact services and performance, and if unaddressed could lead to a Finding. State the suggested actions that can be taken to rectify a Technical Assistance Observation. |
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| **Entrance Conference**Keep documentation of the Entrance Conference as part of the official work papers. |
| Date of Conference: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |
| Attendees:Name \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Job Title \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Name \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Job Title \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_Name \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Job Title \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |
| Topics Discussed: |

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| **Exit Conference**Keep documentation of the Exit Conference as part of the official work papers. |
| Date of Conference: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |
| Attendees:Name \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Job Title \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Name \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Job Title \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_Name \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Job Title \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ |
| Topics Discussed: |
| **Exit Meeting Summary** |
| On <Insert Month Day, Year>, an exit meeting was held with \_\_\_\_\_\_\_\_\_\_\_\_\_\_, and \_\_\_\_\_\_\_\_\_\_\_\_\_\_. During the meeting all of the above Findings and Observations were discussed and agreed upon. |