CTEIS Follow-Up Training

October 2023

01

Introduction:

- CTEIS Support Resources and PTD contact information found on: Support.cteis.com

02

Follow-Up Process Overview:

- Introduction to Follow-Up collection. Steps for success.
- Review Follow-Up Packet materials- Follow-Up Instructional Guide.
- How to generate and review your Follow-Up listing.

03

How to conduct the survey:

- Review Protocol Manual- Purpose, Importance of the Follow Up data collection.
- Example Follow-Up survey review.
- How to enter survey data into CTEIS.

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04

Complete the report and submission process:

- Review and complete the report.
- FA Review and CEPD Submission.
- Survey Results- Follow-Up survey generate: X0610, X0611, and T1608 reports.

05

Looking Ahead:

- Expenditure Report: Fiscal Agent submit to CEPD Administrator: November 2, 2023 and CEPD Administrator submit to OCTE: November, 9, 2023.
- Follow-Up: Fiscal Agent submit to CEPD Administrator: January 11, 2024. and CEPD Administrator submit to OCTE: January 18, 2024.