



CHICAGO COOK
WORKFORCE PARTNERSHIP

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Writing and Submitting Individual Training Accounts (ITAs)

May 2024



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Agenda



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1. Welcome and Introductions
2. Eligible Training Provider Application and Process
 - Eligible Training Provider List
 - Training Provider Qualifications
 - Target Industries
 - Local Occupation List
 - LWIA #7 40 Target Occupations for ITA Training
3. Individual Training Accounts (ITA) and Requirements
 - Definition
 - Steps to Being Approved for an ITA (Eligibility and Suitability)
 - Case Note Requirement
 - Career Connect ITA Requirements
4. EdAssist Process
 - EdAssist Initial ITA Request
 - EdAssist Initial ITA Application (Procedures, Forms and Financial Aid)
 - Additional EdAssist ITA Guidelines
 - Overview and Demo of Partnership ITA Forms (Exploration Form, Financial Statement, Attendance Sheet and Sample LOC)
 - EdAssist ITA Request Review Procedures (Time Frames, Reminders, Shutdowns and Voids)
5. Career Connect ITA Service Procedure
6. EdAssist Billing
7. Training Providers Outside of LWIA #7
8. Credentials
9. Questions

Eligible Training Program List



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The Eligible Training Program List (ETPL) is a compiled list of training schools that have applied through their Local Workforce Areas (LWA) to have their training programs added to the Illinois ETPL which can be found on Illinois workNet.

Approved training programs are eligible to receive ITA funds in exchange of providing quality occupational skills training for the programs listed on Illinois workNet.



The list is based on the Demand Occupation List developed by the state which shows what occupations may receive ITA's in Illinois

- <https://www.illinoisworknet.com/Training/Pages/WIOATrainingProgramSearch.aspx>



What are the Primary Qualifications?

- **Private Business and Vocational Schools**
 - Must be certified by the Illinois Board of Higher Education (IBHE)
 - Must be certified by Illinois Department of Professional Regulations (IDPR) if applicable
 - **CDL Schools**
 - Must be approved by the Illinois Secretary of State
 - **Community Colleges**
 - Must be approved by the Illinois Community College Board
 - **Colleges and Universities**
 - Must be approved by Higher Learning Commission (HLC)
- Apprenticeships**
- Must be approved by the Department of Labor



ALL MUST PROVIDE TRAINING THAT WILL LEAD TO A CERTIFIED CREDENTIAL

How do they Apply and When?



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- The Partnership has four application periods

- February 1st-15th
- May 1st-15th
- August 1st-15th
- November 1st-15th



- Applications are submitted to our Training Provider Email which is:
- trainingproviderapplications@chicookworks.org
- Applications are reviewed internally and then submitted to the Service Delivery Committee and then to the Workforce Board for approval

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Current Provider Recertification Measures



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- New Programs must be recertified after the first year of certification.
- Older Programs are certified every two years.
- The performance must meet or exceed the following measures for programs that have 10 or more exiters over the past two years.

Measure	Goal	Meeting Range
Successful Training Completion Rate (SC)	70%	63%-70%
Credential Attainment Rate (CAR)	60%	54%-60%
Training-Related Entered Employment Rate (TREE)	70%	63%-70%

Where is the Application Located?



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- The Training Provider application is located on The Partnership's website.
- Go to: Our Network>Occupational Training Providers

<https://chicookworks.org/wioa-occupational-training-providers/>

- The Application consists of three Parts. Part I, Part II and Part III.

Please direct any interested parties to this site.

Target Industries for LWIA #7



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Business and Professional Services



Healthcare and Social Services



Retail, Culinary, and Hospitality



Information Technology



Manufacturing



Transportation, Distribution, and Logistics



Construction

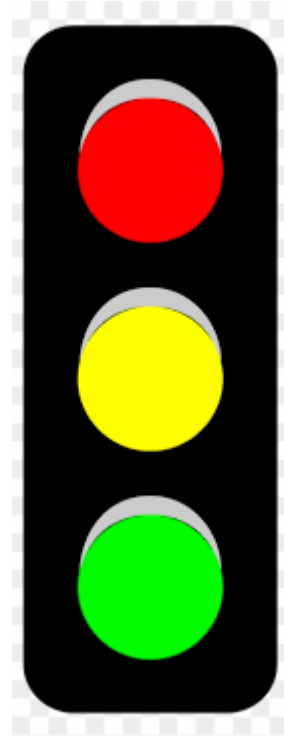
Local Occupation List



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- The Demand Occupation List (DOTL) identifies which occupations are an appropriate use for ITAs.
- Our LWA identified occupations that are in High Demand in our local area and are reflected on the local target occupation list.
- Occupations coded in green are an appropriate use for ITAs and do not need additional documentation
- Occupations coded in Yellow may be appropriate for an ITA but will require additional case notes and justification.
- Occupations listed in Red on our list are not appropriate for ITAs and no longer allowable.





- A copy of the current list can be found on the ZenDesk
- <https://worforceboard.Zendesk.com/hc/en-us>
- The list is located under WIOA Programs>ITA Procedures & Forms>Revised Occupation List



What is an ITA?



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Also known as a Letter of Credit (LOC) by EdAssist, a voucher is a promissory note given to the training provider by the customer prior to beginning their WIOA funded portion of their training to indicate they have been approved to attend training at their institution.

A customer may only receive one ITA but may be issued multiple vouchers in cases where books or other training related materials must be purchased from a third-party vendor. For example: Follett Bookstore.

For LWIA #7, The Partnership, it is a 3-tiered (\$3,000, \$5,000 and \$8,000) voucher for tuition and fees with the amount based on the occupation, which can be awarded to an eligible and suitable customer in need of occupational training. There is a lifetime limit of one ITA per customer dating back to the launch of The Partnership on July 1, 2012.



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Steps to being approved for an ITA



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- Attend Orientation
- Meet with a Coach
- Go through Eligibility and Suitability
- Career Exploration
- Research Schools (minimum of two)
- A proper training justification case note with all necessary information
- Coach applies for an ITA via EdAssist
- The ITA voucher is given to the student to sign
- The student brings the voucher to the school for signature prior to beginning training



Eligibility



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Customers in need of training services must meet the following requirements before an ITA can be requested:

- Must be a registered WIOA Customer (1A, 1D, 1E/1N, 1Y In-School or Out- of-School).
- Must have participated in Career Exploration (1A/1D) or Vocational (1Y) Exploration and the service recorded in Career Connect.
- Must have an Individual Employment Plan (IEP) or Individual Service Strategy (ISS) (youth only) created in Career Connect.
- Must have test scores recorded as well as a case note indicating their suitability for training.



All customers referred to Occupational Training must be found **suitable** for their program of choice. Suitability is determined by the Career Coach based on the **requirements of the chosen career**, but also how well they expect the customer will succeed in not only training, but also in getting and keeping training related employment.

At minimum, the following items should be addressed:

- The participant must meet the minimum requirements of training program.
- The participant's individual barriers have been addressed.



Basic Case Note Requirements



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The training case note is very important as it provides the narrative for the expenditure of funds for an ITA. This expenditure must be justified based on a number of criteria.

1. The Participant must be eligible and suitable for training.
2. The Participant must understand the Career Path and wages for the occupation they have selected.
3. The Participant must visit at least two, preferably three providers, who offer the training selected.



4. The names of the schools visited, along with the name of the person they met with and the reason for the school chosen, must be included in the case note.



Requirements

- The case note must explain how the participant is matched for the training program and must include:
- **Why the person chose the particular training vendor**
- Job readiness, career exploration testing, and assessment of the participant's aptitude and interests related to the selected training program.
- If the participant has an associate degree or above; passed the school entrance/placement exam dated within the last year for adult program clients and 6 months or less for youth programs, which is related to the program description in Illinois workNet; whether the Training Program does not require Math test.



All Yellow Occupations require a case note. The case note should contain the following information:

- Identify that the participant's chosen training program is in Yellow.
- Documentation showing the participant was informed that the chosen Yellow occupation is in lower demand or has lower wages than those in Green.
- The career pathway for this occupation, if any, has also been explained to the customer.
- The customer should understand all information given to her/him and wants to continue with the approval of the ITA for this occupation.

Yellow Case Note Example



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Customer chose the Dental Assistant program at Chicago State University which is a Yellow coded occupation.

A copy of local LMI has been discussed with the customer and placed in the file showing dental assistant is in lower demand than a similar Green occupations such as Dental Hygienists.

There is no sequential Career Pathway for dental assistant unless customer wants to become a dentist. The customer understands that by selecting this training program their career advancement opportunities are limited.



Participants Who are Working



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- If a Participant is working at the time of enrollment and is seeking a voucher for training:
 - ✓ Please make sure that their job will not interfere with their training schedule.
 - ✓ Case note the reason they need training and if they will be seeking employment with another company upon completion of the program.
 - ✓ Make sure that any barriers such as childcare and transportation are addressed.

Career Connect ITA Requirements



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Before entering the Initial ITA Request Service in Career Connect, make sure the following steps have been completed:

- ✓ Numeracy and Literacy scores are entered.
- ✓ **The State Specific Tab of the WIOA application is complete.**
- ✓ Adult/Dislocated Workers have been certified for training.
- ✓ An IEP or ISS has been created and its service has been open.
- ✓ You have written the proper case notes and titled them correctly.
- ✓ A Career Coach has been assigned to the WIOA application.
- ✓ Information from the Initial ITA Request Service will be transferred to BHES within two business days.

EdAssist Initial ITA Request



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The Initial ITA Request is a Career Connect same day service that needs to be entered for every customer seeking training and is the **initial step** to request an ITA in Career Connect.

Once the initial step has been completed, you'll want to check Career Connect the next day to make sure your customer's information transferred over.

If you sign into Bright Horizons and you are not able to see your customer's information, the service was probably entered incorrectly.

Go back to CC and edit the service and resave it, the information should be there the following day.

If you are still unable to see the customer, please send a ticket to the helpdesk helpdesk@chicookworks.org including the name and state ID.



EdAssist ITA Application



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The ITA Application is created in Bright Horizons with the customer's selected training program information.

The Career Coach must ensure that **all necessary supporting documentation**, such as the Financial Statement, are attached to the customer's file correctly to avoid delays in the issuance of the ITA.

Those costs must also match those listed in Illinois workNet or the application will be rejected.



EdAssist ITA Procedures



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- To access BHES website, go to <http://partnership.edassist.com>
- ITA Application will be submitted by Career Coach and must include:
 - Education Program
 - Field of Study
 - Education/Training Provider
 - Program Dates
 - Course/Program Name
 - Total ITA Obligation Amount
 - Financial Statement Form
 - Career Coach will be required to attach a pdf of the Financial Statement to the ITA Application in BHES

Overview of Partnership ITA Forms



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Demonstration of the following forms:

- Training Provider Exploration
- Financial Statement
- ITA Training Attendance Sheet
- Sample LOC





What is a Training Provider Exploration Form?

It is a form given to the customer by the Career Coach. It is to be used while visiting a minimum of two certified training providers offering the same training program of their choice as part of the ITA application process.





What is the Financial Statement?

It is a form that indicates the training program costs and any financial aid offered by the training provider. It must be completed electronically by the career coach, attached to the customer's EdAssist application, and submitted in Bright Horizons.



Financial Aid



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For WIOA purposes, financial aid is considered:

- Pell grant
- MAP grant and/or
- School scholarships.



Federal loans are not considered financial aid.

In the case of veterans, a Pell grant can be used for living expenses.

For all other customers, financial aid awarded will apply first to the program cost, and then WIOA funds can be applied according to the 3-tiered limit.

Additional EdAssist ITA Guidelines



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- ITAs for a long-term degree will only be approved if the customer has less than 24 months remaining and outstanding balance of less than the maximum ITA limit for the applicable program.
- EdAssist will verify that payment arrangements have been made and documented on the financial statement when the tuition/fees cost exceeds the tuition/fees limit.
- No exploration forms are needed if your customer is already in training
- **NO customers may attend classes before the WIOA ITA start date until EdAssist issues ITA.**

EdAssist ITA Request Review Procedures



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- EdAssist will review all applications, including the Financial Statement before approving the ITA.
- If the application is Incomplete or Incorrect, you will receive an email notification requesting additional information, or a correction.
- If the application is **Denied**, the email notification will include the reason for denial, and a new application might be required.
- The approved ITA will be emailed to the Career Coach who will give it to the customer to send it to the training provider along with the attendance sheets before training starts.



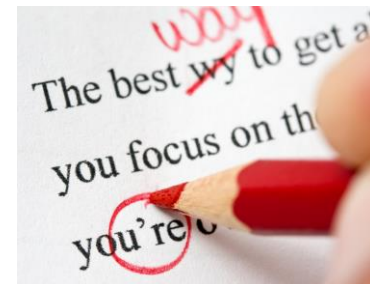
EdAssist Time Frames



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- You may submit 15 prior to start of class.
- You **must** submit 5 business days before the beginning of class
- **Check for errors!**
- Make sure the costs match Illinois workNet!
- Expedites may be requested but your Manager and Partnership Program Manager should be cc:'d on the request.
- Voucher is good for 30-60 days.



Reminders



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- The Initial ITA Request service is a **same day service** therefore it must be closed the same day, and **successfully** for the information to be transferred into Bright Horizons.

When ITAs are shut down, the only ITA Requests that will be reviewed/approved are those with one of the following exceptions:

- Veterans (ITA stoppages never apply to Veterans).
- Nursing Programs or another long-term program in the final semester.
- Graduates of Bridge Programs who are going on to advanced training.
- Special Initiatives, where the commitment of training dollars is required by the funding source.
- Community College programs that are on a semester basis.
- Other special exceptions.



Shut-Down Procedures



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During shut-down periods, if requesting an ITA Exception for a customer group that is shut-down please use the following service codes:

- 233-ITA Exception (Adult/DW)
- 451-ITA Exception (Youth)

In addition, add a case note with the subject “ITA Exception” indicating how it qualifies under an exception. Keep in mind that if the regular Initial ITA Request Service is entered, the voucher **WILL NOT** be approved. Any further questions please send an email to The Partnership.

Canceling an ITA in EdAssist



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- Prior to canceling an ITA in BHES, you must check with the school to confirm that no billing is going to be submitted.
- For step-by-step instructions on how to login and add an application in BHES please refer to the Bright Horizons EdAssist Solutions (BHES) ITA Application Procedure.
- This procedure can be found in the helpdesk:
<https://workforceboard.zendesk.com/hc/en-us>
Under WIOA Topics>ITA Procedures & Forms
- An ITA may not be cancelled if the participant has started training as there will be some funds owed to the training provider.



Career Connect ITA Service Procedure

- Every customer that receives an ITA to attend occupational training must have a 300- Occupational Skills Training service (Adult/DW) or a 453-Occupational Skills Training service (Youth).
- **Before adding the 300-Occupational Skills Training (Adult/DW), make sure to complete the WIOA Training Criteria section on the State Specific tab of the WIOA Application.**
- For Step-by-Step instructions on how to add the service, please refer to the ITA Service Procedures located in the helpdesk under WIOA Topics
<https://workforceboard.zendesk.com/hc/en-us>
- **If the Participant is attending an Apprenticeship program, use code 315.**

Voiding and ITA Service in Career Connect



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- If an Occupational Skills Training Service needs to be voided, please submit a ticket to the helpdesk. You should include customer name, State ID and why the service needs to be void.
- Helpdesk tickets can be sent to: helpdesk@chicookworks.org





- Billing instructions are included on the ITA.
- Providers bill EdAssist directly, no invoices or bills should be sent to you.
- Providers may bill after the Participant has been enrolled in training for one month.
- The billing includes a copy of the ITA, one month of attendance and an invoice from the school.



- Participants may attend training outside of our LWIA if the training is in an approved occupation.
- If working with a provider outside of our area, please refer them to the ITA for billing instructions if you have not worked with them before.
- The same goes for Apprenticeships



Credentials



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- Credential attainment affects not only the Training Providers performance but also the performance of your agency as well as The Partnership.
- When adding your customer's credential in Career Connect, please make sure you associate the credential with the ITA enrollment service otherwise it won't get recorded.

Q & A



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Adjournment



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Thanks for your time! We hope this information will be useful to you.

Sincerely,

Anne Hogan & Rosa Marquez

Feel free to reach out to us at:

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rmarquez@chicookworks.org

