CHICAGO COOK
WORKFORCE PARTNERSHIP

A proud partner of the AmericanJobCenter® network

TARA Transition Webinar

December 18, 2024

Technical Check

Good Morning,

Please confirm that you can hear and see the screen by introducing yourself in the chat box.

Your lines are muted. Please enter questions in the chat box and we will answer.

Agenda

➢ Welcome and Introductions
  o Program Relationship Managers
  o International Scholarship & Tuition Services (ISTS)

➢ Demonstration of ISTS System:
  o How to access the site and log in
  o How to submit ITA applications
  o How to obtain a letter of credit (voucher) after submission
  o How to edit applications
  o How to resubmit a denied application
  o How to cancel an application
  o How to review customer's applications

➢ Important ITA updates
  o New Training Checklists
  o 2nd ITA requests
  o Expedite requests

➢ Office Hours

➢ Questions

@ChiCookWorks #ChiCookWorks

Presenters

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Danny Marshall
Kristi Chevali
Rosa Marquez
Justin Payette
Eric Horn

For more information about The Partnership, visit workforceboard.org call 312.603.0200, follow us on social media @ChiCookWorks, or Subscribe to In the Works, The Partnership's monthly eNewsletter.

Welcome! Relationship Management Team

Your primary contact at The Partnership is your designated **Program Relationship Manager (PRM).** In order to provide the best and most timely service and follow-up possible, please reach out to your designated PRM as he/she will make certain partnership staff are included as needed. Their names and email addresses are listed below

Renee Francis rfancis@chicookworks.org
Danny Marshall dmarshall@chicookworks.org
Cynthia Rodriguez crodriguez@chicookworks.org
Cassie Vinson cvinson@chicookworks.org
Carlos Valentin cvalentin@chicookworks.org
Joshua Williams jwilliams2@chicookworks.org

If for some reason, you are not aware of your designated PRM, please reach out to Patti Prado at pprado@chicookworks.org

What's not changing

➢ Initial ITA request: Continue to enter the Initial ITA Request service in Career Connect as you normally would.

➢ Assign a Career Coach: You must still make sure the customer is assigned to you in Career Connect.

➢ ITA Application: Will still be reviewed to make sure the Program and Financial Statement match what is listed in Illinois workNet.

➢ ITA Policy

What is changing

Changing as of January 1, 2025:

✓ New platform to access ITA applications and vouchers
  o No longer have to "impersonate" the customer
  o Will be able to see a list of your customers and their status

✓ Accessing ITA Applications: You will receive an email from ISTS when the application is ready to be competed. Should still be 1 business day from entering the Initial ITA Request service.

✓ Training Provider Billing Contact: Now ***required*** as part of the application. Will need to provide a name & email address. Exploration Form has been updated.

✓ Training Checklists: Now ***required*** for ITA's and Apprenticeships

✓ ITA Timelines: ***You can now submit applications as early as 30 business days before the start date.***

International Scholarship & Tuition Services
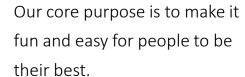
About ISTS

ISTS is dedicated to providing comprehensive educational assistance administration to **program sponsors** as well as guidance, support and educational resources to the **students** we interact with each and every day.

Our core purpose is to make it fun and easy for people to be their best.

100% Women-Owned Business

50 US based employees

Based in Nashville, TN

Proprietary Application System: Applicant Information Manager (AIM)

Founded in 1985

350+ scholarship & grant programs managed annually and operates Internationally

ISTS Demo

- ✓ How to access and log into ISTS
- ✓ How to submit ITA Applications
- ✓ How to obtain a letter of credit (voucher) after submission
- ✓ How to edit applications
- ✓ How to resubmit a denied application
- ✓ How to cancel an application
- ✓ How to review customer's applications
- ✓ How and when to contact ISTS?

Blackout Period

As we transition to ISTS, ITA requests will have **a temporary blackout period from**

Thursday, December 19 COB to Wednesday, January 1st.

Please submit all your ITA requests in **EdAssist** by 5:00 pm Thursday, December 19, 2024.

Begin using ISTS on Thursday, January 2nd

Initial ITA request

➤ This process has not changed. Continue to enter the Initial ITA Request service in Career Connect as you normally would.

➤ Once the initial step has been completed, you'll receive an email within 1 business day from ISTS to begin the customers application.

➤ You will not have to log into their site to see if the information from CC transferred correctly. If you did not receive an email the next day, you will know something is wrong.

➤ If you don't receive an email within 1 business day, go back to CC and edit the service and resave it, then you should receive an email the next day.

➤ If you still have not received an email from ISTS please send a ticket to the helpdesk helpdesk@chicookworks.org including the name and state ID.

ISTS ITA Procedures

➤ To access ISTS, you will receive an email to begin the application. As shown in the demo, you will log in with your email and then you can create a password by clicking on the "forgot password" link.

➤ 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 attached as a PDF
  - New! ITA/Apprenticeship Checklist attached as a PDF
  - New! Training provider name & email are now required for billing. This information has been added to the Exploration forms.

ISTS ITA Request Review Procedures

➢ ISTS will review all applications, including the Financial Statement & Checklists before approving the ITA.

➢ If the application is Incomplete or Incorrect, you will receive an email notification requesting additional information, or a correction.

APPROVED

DENIED

➢ If the application is Denied, the email notification will include the reason for denial, and a new application might be required.

➢ The approved ITA voucher will be emailed to the Career Coach who will give the voucher to the customer to send it to the training provider along with the attendance sheets **before training starts**.

Canceling an ITA in ISTS

➢ Canceling a voucher requires email to ISTS: chicookworks@applyISTS.com

➢ Prior to canceling an ITA in ISTS, you must check with the school to confirm that no billing is going to be submitted.
  ✓ This must be included in the email to ISTS
  ✓ Include customers name and ISTS Application number

➢ An ITA may not be cancelled if the participant has started training as there will be some funds owed to the training provider.

ISTS Time Frames

- **You may submit 30 days** 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!

- **Voucher is good for 60 days**.

NEW! Training Checklists

- ➢ The following checklist is now ***REQUIRED to be completed and UPLOADED*** to ISTS when requesting an ITA for your customer. If this document is not uploaded your application will be denied.

- ➢ Information on the Checklist is not new; we just want it to be clearly documented in the customer file.

- ➢ The checklist will ensure you have everything in the customer file in order to:
  1. Justify the need for sending your customer to training.
  2. Make sure you have everything needed for an audit.

- ➢ Revised ITA Procedure now includes
  - ✓ How to document an occupation in Yellow category (lower demand)
  - ✓ ITA Checklist or Apprenticeship Checklist

NEW! Training Checklists

The following must be completed **_before_** entering the Initial ITA Request service in Career Connect. All documentation must be in customer files.

❑ Minimum of 2 Exploration forms in file
❑ Enter the literacy and numeracy scores.
❑ Certify the participant for training (Adults and Dislocated Workers).
❑ Create the Individual Employment Plan (IEP) / Individual Service Strategy (ISS).
❑ Enter the Develop IEP/ISS service. **Remember: Follow customer flow, OAS, Career Exploration, IEP/ISS)**
❑ Assign a Career Coach to the WIOA application
❑ CDL Requires that participants must be 21 or older

Case Note Requirements

➢ <u>Training Exploration Form Results Case Note:</u> This case note should document the 2 - 3 schools the customer visited and should include the school's name, person they spoke with and which school they chose and why.

➢ <u>Training Justification Case Note:</u> Participant must be suitable for the occupation chosen. List the participants current skills and what skills are needed for their training program.

   o Job readiness, career exploration testing, and assessment of the participant's aptitude and interests related to the selected training program should be case noted.

   o 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 or if the client is only going to participate in an OJT, Customized Training, or Work Experience should be case noted.

Case Note Requirements

- **All Occupations in <mark>Yellow</mark> require a case note.** The case note should contain the following information:
  - Identify that the participant's chosen training program is in <mark>Yellow.</mark>
  - Documentation showing the participant was informed that the chosen <mark>Yellow</mark> occupation is in lower demand or has lower wages than those in <mark>Green</mark>.
  - 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.

Apprenticeships

- Registered Apprenticeship Programs (RAPs) are first reviewed, vetted, and approved by the United States Department of Labor (USDOL), Office of Apprenticeship.

- According to USDOL guidance, RAPs can be automatically added to Illinois' ETPL if the program chooses to do so. DCEO's role is to verify the RAP's standing in the USDOL's "RAPIDS" database.

- **Although DCEO does not review or vet the apprenticeship elements, career planners must ensure the program adheres to all state and federal guidance, including appropriate approvals by the Illinois authorizing or approving education entity.**

- An ITA can only fund the classroom portion of a registered apprenticeship program's *Related Technical Training* components. When a Registered Apprenticeship employer requests wage reimbursement as part of the program, the LWIA's *On-the-Job Training (OJT)* policy and procedures must be followed.

- Apprenticeships are ***required*** to have an employer partner.

NEW! 2nd ITA Request Approval Form

If your customer is in need of a 2nd ITA Request, you **_MUST_** complete this form and send to your **_Program Relationship Manager_** for approval.

2nd ITA Requirements:
- ✓ Must have successfully completed one ITA funded training course; and is requesting a training program in the same or related subject/field (e.g. along a career pathway)
- ✓ The subsequent ITA provides training in a field where the customer is able to use transferrable skills
- ✓ In exceptional circumstances, at the discretion of The Partnership

Please note:
- ✓ A second ITA **_will not_** be approved if the customer withdrew from or failed to complete the initial ITA funded training course.
- ✓ A customer receiving a subsequent ITA may only access the balance of the original lifetime ITA funding maximum amount as applicable based on the voucher limit tiers.

NEW! 2nd ITA Request Approval Form

Information needed for the 2nd ITA Request Form

➤ Was the previous training completed successfully or unsuccessfully

➤ Did the customer get their credential? If no, please provide a detailed response

➤ Are there case notes pertaining to their training?

➤ Did they find employment in what they trained for? Please provide detailed information

➤ Does this align with their career path? Please provide detailed information

➤ **Provide a detailed explanation on why you support this request.**

New or Revised Forms

Demonstration of the following forms:

- Sample Letter of Credit (LOC)/Voucher (showed during demo)

- Revised Exploration Form

- New ITA/Apprenticeship Checklists

- New 2nd ITA Approval

- Updated ITA Procedure LINK: https://workforceboard.zendesk.com/hc/en-us/articles/32824841286541-

NEW! Revised Exploration Form

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Training Assessment Review

Training Provider Exploration Form

All customers applying for WIOA funding for training programs must meet with a school counselor to discuss the following information. *(All customers must visit a minimum of two (2) training facilities.)*

Please return this form to the student's Career Coach:		_at_	

Student's Name		Last 4# SSN	
School Contact Person		Title	
Name of School			
School Street Address		City	
State		Zip Code		School Email	
School Phone #		School Fax #	
School Billing Contact Person	**Name**		**Email**
Registration Date		Class Start Date		Class End Date	
Name of Program			
Days of Week		Hours Per Day	
Total Program Hours		Total Weeks	

NEW! ITA Checklist

ITA Checklist

The following must be completed **_before_** entering the Initial ITA Request service in Career Connect. Documents must be in customer files.

☐ Minimum of 2 Exploration forms in file

☐ Enter the numeracy and literacy scores.

☐ Certify the participant for training (Adults and Dislocated Workers).

☐ Create the Individual Employment Plan (IEP) / Individual Service Strategy (ISS).

☐ Enter the Develop IEP/ISS service.

☐ Assign a Career Coach to the WIOA application.

☐ Case Note Requirements

- o Training Exploration Form Results Case Note: This case note should document the 2 - 3 schools the customer visited and should include the school's name, person they spoke with and which school they chose and why.
- o Training Justification Case Note: Participant must be suitable for the occupation chosen. List the participants current skills and what skills are needed for their training program.
  - • Job readiness, career exploration testing, and assessment of the participant's aptitude and interests related to the selected training program should be case noted.
  - • 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 or if the client is only going to participate in an OJT, Customized Training, or Work Experience should be case noted.
- o All Occupations in Yellow 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.

☐ CDL Requires that participants must be 21 or older

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NEW! Apprenticeship Checklist

Apprenticeship Checklist

The following must be completed _before_ entering the Initial ITA Request service in Career Connect:

☐ Enter the numeracy and literacy scores.

☐ Certify the participant for training (Adults and Dislocated Workers).

☐ Create the Individual Employment Plan (IEP) / Individual Service Strategy (ISS).

☐ Enter the Develop IEP/ISS service.

☐ Assign a Career Coach to the WIOA application.

☐ Case Note Requirements

- o Training Exploration Form Results Case Note: This case note should document the 2 - 3 schools the customer visited and should include the school's name, person they spoke with and which school they chose and why.
- o Training Justification Case Note: Participant must be suitable for the occupation chosen. List the participants current skills and what skills are needed for their training program.
  - Job readiness, career exploration testing, and assessment of the participant's aptitude and interests related to the selected training program should be case noted.
  - 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 or if the client is only going to participate in an OJT, Customized Training, or Work Experience should be case noted.

Please Note: Once participant begins their training enter code 315: Registered Apprenticeship Program (RAP). The 2nd ITA Policy also to applies to Apprenticeships.

NEW! 2nd ITA Request Approval Form

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69 WEST WASHINGTON I SUITE 2860 I CHICAGO, ILLINOIS 60602 I TEL 312 603-0200 I FAX 312 603-9939/9930

This form is to be used when requesting a **2nd Voucher for your WIOA Registered Customer**. This form needs to be approved by The Chicago Cook Workforce Partnership. Once approved or denied an email will be sent. Please place this request in customer's file and complete a case note entry in the case management system, if applicable.

The following conditions must be met in order for a customer to be considered for a 2nd ITA:
1. Must have successfully completed one ITA funded training course; and is requesting a training program in the same or related subject/field (e.g. along a career pathway) which will provide additional skills to support their move toward self-sufficiency.
2. The subsequent ITA provides training in a field where the customer is able to use transferrable skills
3. In exceptional circumstances, at the discretion of The Partnership

A second ITA will not be approved if the customer withdrew from or failed to complete the initial ITA funded training course. A customer receiving a subsequent ITA may only access the balance of the original lifetime ITA funding maximum amount as applicable based on the voucher limit tiers.

Agency Name:	
Career Coach Name:	
Customer Name:	
Career Connect State ID:	

Please provide the information on the customer's previous training.

Name of the Training Provider:	
Start and End Dates:	
Name of Training Program and Tuition Amount:	
Completion Status (Successful or Unsuccessful, etc):	
Did they get their credential, Y/N? Please provide a	

Expedite Requests

- **We will no longer honor any expedite requests.** The only exception is if Career Connect or ISTS websites are not working.

- **You may now submit 30 business days prior to start of class. Do not wait until the last minute.**

- You **must** submit 5 business days before the beginning of class

- The expectation is that each Career Coach allow themselves enough time to complete an ITA request.

- Carer Coaches please:
    1. Inform customers that the ITA process is not a quick turn around. It can take up to and possibly more than 30 days to receive a voucher.
    2. Make sure it will support their career goals and that customers are suitable for their training of choice.
    3. Make sure people understand this is a once in a lifetime opportunity

Office Hours

The Partnership will conduct office hours during this transition period

- ➢ Option 1: Tuesday, 1/7 from 10:30am – 12pm
- ➢ Option 2: Thursday, 1/9 from 2pm – 3:30pm
- ➢ Option 3: Tuesday, 1/14 from 10:30am – 12pm
- ➢ Option 4: Thursday, 1/16 from 2pm – 3:30pm

Please use the LINK below to register for one of the sessions
https://chicookworks-org.zoom.us/meeting/register/tZMlcuyqqzgtGNb1O5RWrUwjWIdxf8cfyaI6

These sessions will be for troubleshooting any issues. We will not cover any new material during this time. Please join us at the times above if one of the following occurs:

- Have not received an email after entering Initial ITA service (1 day)
- Receiving error messages
- Cannot move through the screens successfully
- If you suspect something is not working correctly
- Need assistance navigating through the system

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As we transition to ISTS, ITA requests will have **a temporary blackout period from**

Thursday, December 19 COB to Wednesday, January 1st.

Please submit all your ITA requests in **EdAssist** by 5:00 pm Thursday, December 19, 2024.

Begin using ISTS on Thursday, January 2nd

Q & A

Adjournment

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

Feel free to reach out to your Program Relationship Manager

Renee Francis rfancis@chicookworks.org
Danny Marshall dmarshall@chicookworks.org
Cynthia Rodriguez crodriguez@chicookworks.org
Cassie Vinson cvinson@chicookworks.org
Carlos Valentin cvalentin@chicookworks.org
Joshua Williams jwilliams2@chicookworks.org

If for some reason, you are not aware of your designated RM, please reach out to Patti Prado at pprado@chicookworks.org

Thank You!

HAPPY HOLIDAYS