



## ITA Initiation Procedure

### Overview

Career Coaches should follow the procedure below in Career Connect, and the data needed to begin the ITA process will automatically transfer to the Bright Horizons EdAssist Solutions (BHES) data system where the Career Coach can then complete the ITA application.

Once the participant has submitted the two required exploration forms to the Career Coach, and the participant has selected the training program and training provider, the process to request an Individual Training Account (ITA) may start. **Please do not begin the process unless training is eminent**, generally this means the training program the participant has selected is going to begin within the next two weeks.

### Navigation

An Initial ITA Request service should be entered in the Services bar of the WIOA application. An Initial ITA Request service can be added in the WIOA Program screen under Staff Profile>Case Management Profile>Programs>Activities/Enrollments/Services.

### Requirements

Prior to entering the Initial ITA Request service in Career Connect:

- The Participant must submit the two training program exploration forms and select a training provider and program
- The Career Coach must:
  - 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.

### Procedures

1. Expand the Activities/Enrollments/Services bar by clicking on the plus sign.

|                                       |            |
|---------------------------------------|------------|
| ☐ Participation                       | 09/18/2018 |
| ☐ Activities / Enrollments / Services | 2          |
| ☐ Measurable Skills Gain              | 0          |
| ☐ Partner Programs                    | 0          |

- Then, click on the Create Activity/Enrollment/Service link to add the Initial ITA Request service.

Activities / Enrollments / Services 2

[Create Activity / Enrollment / Service](#)

Search:

| Status | Activity / Provider   | WZ | Funding / Grant | Projected Begin Date | Actual Begin Date | Projected End Date | Actual End Date                                     |
|--------|---|----|-----------------|----------------------|-------------------|--------------------|---|
| C      | <a href="#">205 - Develop IEP -Same Day Service</a><br>Business And Career Services Inc.    | W  | Adult           | N/A                  | 09/18/2018        | 09/18/2018         | <a href="#">09/18/2018</a><br>Successful Completion |
| C      | <a href="#">203 - Case Management -Same Day Service</a><br>Employment And Employer Services | W  | Adult           | N/A                  | 09/18/2018        | 09/18/2018         | <a href="#">09/18/2018</a><br>Successful Completion |

- In the General Information section, under Customer Program Group, select the funding stream. The Customer Group for the Initial ITA Request service must be the same Customer Group that will be used to pay for the ITA.

**General Information**

**Participant User Name:** JPENA4982

**Participant State ID:** 3917568

**Last Name, First Name MI:** Pena, Joe

**Social Security Number:** 4982

**Address:** 1701 N 1st St  
Maywood, IL 60153

**Application Summary:** Program: Title I - Workforce Development (WIOA)  
Application Date: 9/18/2018  
Earliest Eligibility Date: 09/18/2018

**Participation Date:** 09/18/2018

**\* Customer Program Group:** 10B - Adult - Individualized Services/Training ▼

**\* LWDB:**  ▼  
LWDB cannot be modified if staff has local region assignment.

**\* Office Location:**  ▼

4. Scroll down to the Enrollment Information Section.
  - For the Service Activity Level select Career Services (Adult/DW) or Academic Learning Services (Youth).
  - For the Activity Code select service:
    - 231 Initial ITA Request (Same Day Service) for Adult,
    - 235 Initial ITA Request (Same Day Service) for Dislocated Worker, or
    - 423 Initial ITA Request (Same Day Service) for Youth.

Enrollment Information

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**Grant:**  ▼

**WIOA or Non-WIOA Partner Program:**  Yes, service is a WIOA or Non-WIOA Partner Program.

**\* Service Activity Level:**  ▼

**\* Activity Code:**  Initial ITA Request (Same Day Service)  
[Select Activity Code](#)

**Projected Begin Date:**

**Actual Begin Date:**

**\* Projected End Date:**

5. Then, enter the Actual Begin Date and the Projected End Date. These dates should be the same since the Initial ITA Request service is a **Same Day Service**.

**\* Activity Code:** 231 - Initial ITA Request (Same Day Service)  
 Activity code cannot be modified.

**Projected Begin Date:**

**Actual Begin Date:**   
 You do not have sufficient privileges to modify this field.

**\* Projected End Date:**

**Any classes attended through Distance Learning:**  Yes  No

6. Scroll down to the State Specific Information section. For State Fund select your program year contract which should include the title of your participant. Please be careful when enrolling in a special grant such as 1E, 1N or 1G, to make sure you pick the correct grant number.

**State Specific Information**

\* **State Fund:** 18681007 - 1A, 1D, 1Y, 1DC Adult, DislocWkr, Youth ▼

**Supports Bridge Program:**  Yes  No

**Bridge Program Activity:**  Yes  No

**Green Related:**  Yes  No

7. Then, select No for Bridge Program Activity and Green Related.

\* **State Fund:** 18681007 - 1A, 1D, 1Y, 1DC Adult, DislocWkr, Youth ▼

**Supports Bridge Program:**  Yes  No

**Bridge Program Activity:**  Yes  No

**Green Related:**  Yes  No

8. Scroll down to the bottom and click Next.

Case Notes:

[ [Add a new Case Note](#) | [Show Filter Criteria](#) ]

| ID             | Create Date | Subject | Action |
|----------------|-------------|---------|--------|
| No data found. |             |         |        |

Next >>

[ [Exit Wizard](#) ]

9. In the Enrollment Service Provider Information section, for Provider select your organization. For Service, Course or Contract select Office Services. The provider location should come up automatically, if not, please select your location by clicking on Select Provider Locations.

**Enrollment Service Provider Information**

**Enrollment Summary:** Enrollment ID: 288171  
Username: JPENA4982  
WIOA Application ID: 366503  
Activity Code: 231 - Initial ITA Request (Same Day Service)  
Activity Dates: 10/11/2018 - 10/11/2018

**\* Provider:** Business And Career Services Inc.  
[\[ Select Provider \]](#)

**\* Service, Course or Contract:** Office Services  
[\[ Select Service, Course or Contract \]](#)

**Provider Locations:** Business and Career Services Inc.  
723 W. Algonquin Road  
Arlington Heights, IL 60005  
[\[ Select Provider Locations \]](#)

10. The Provider Contacts is not required but may come up automatically. For Relationship Number, select the numbers associated with the participant's title. For example, if the participant is a 1A, the relationship number should end with 100. Then click next.

**Provider Contacts:** Al Saulys  
[\[ Select Provider Contacts \]](#)


**\* Occupational Training Code:** Not Applicable


**Relationship Number:** 8593100 ▼

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11. In the Closure Information Section, enter the Last Activity Date. The Last Activity Date must be the same as the Actual Begin Date. For Completion Code select Successful Completion. ***If Successful Completion is not selected, the service will not be sent to EdAssist and your initial request for a voucher will not be received.***


**Enrollment Summary:** Enrollment ID: 288171  
Username: JPENA4982  
WIOA Application ID: 366503  
Activity Code: 231 - Initial ITA Request (Same Day Service)  
Activity Dates: 10/11/2018 - 10/11/2018


**Last Activity Date:**   Today

**Completion Code:**  

12. Add a Case Note using the Case Note link. The Case Note should indicate the steps the Participant took that led to the Initial ITA Request.

13. Finally, click Finish to add the service.

**Last Activity Date:**   Today

**Completion Code:**  

**Case Notes:**

[ [Add a new Case Note](#) | [Show Filter Criteria](#) ]

| ID             | Create Date | Subject | Action |
|----------------|-------------|---------|--------|
| No data found. |             |         |        |

[Exit Wizard](#)

**NOTE:** The "Initial ITA Request" service is not an Active Service (it does not extend exit). It also does not transmit to IWDS.

## Result

If the Initial ITA Request service has been recorded properly in Career Connect **by 7:00pm Central Time (CT)**, then the information to set up the application for this participant will be transferred to BHES overnight. The next business day, you will be able to continue with the ITA application in the BHES data system.

## What if my information is not in Bright Horizons EdAssist Solutions?

If you sign in to BHES the next business day and you are not able to find your participant's information, it is most likely because the Initial ITA Request service was entered incorrectly. In this case you need to go back to the service in Career Connect, and check the following:

- The service must have an Actual Start Date – if not, add the “Actual Start Date”, and resave the service.
- The service must be closed as “Successful” – if not, change the completion code to “Successful” and resave the service.
- The WIOA application must be assigned to a Career Coach (Case Manager). If it is not, edit the “Initial ITA Request” service, assign the Career Coach, and re-save the service.
- You may only have one “Initial ITA Request” or “ITA Exception” service. (If you have more than one, contact The Partnership to have one voided.)

After correcting the error(s), the information should be in BHES the next business day. If you are still unable to see your participant in BHES, please submit a Helpdesk ticket to [helpdesk@workforceboard.org](mailto:helpdesk@workforceboard.org) including the customer name.

## Procedures During an ITA Shut Down

When ITAs are shut down for one or more customer groups, the only ITA Requests that will be reviewed / approved are those that meet one of the following exceptions:

- Veterans (ITA stoppages **never** apply to Veterans),
- Nursing Programs or other long-term programs which are paid for in the final semester,
- Graduates of Bridge Programs who are going on to advanced training (for example a certified nurse bridge graduate moving to an LPN program),
- Special Initiatives, where the commitment of training dollars is required by the funding source,
- Community College programs that will begin on a semester basis (sometimes does not apply), and
- Any other special exceptions which may be named in the shutdown correspondence.

During ITA shut-down periods, Career Coaches requesting an ITA Exception for a customer group that is shut down, should follow the same process as described above, but use the following service codes:

- 233-ITA Exception (Adult)
- 236-ITA Exception (Dislocated)
- 451-ITA Exception (Youth)

Add a case note to your ITA Exception service with the subject “ITA Exception” that explains how your client meets the exception requirements described above.

Any Initial ITA requests submitted with the regular Initial ITA Request service codes (231, 235 or 423) during a shut-down for a given customer group **will not be reviewed**. If you are not sure if your client qualifies for an ITA exception, please email Anne Hogan at [ahogan@chicookworks.org](mailto:ahogan@chicookworks.org) with a copy to Gabriela Ore at [gore@chicookworks.org](mailto:gore@chicookworks.org).