



## ITA Policies & Procedures - Frequently Asked Questions

### Resolving Common Issues

The questions and answers in this section will help you resolve common issues that have come up since the launching the new ITA process.

***My request was denied because EdAssist said my Financial Statement was blank. I completed it and sent it so I don't understand what happened. Please help.***

If you click on the link and complete the form from your web browser – the data will not save. Instead, download the file and save the blank document to your computer as a .pdf file. Then open the .pdf file (in Adobe Acrobat), complete it, and save it.

***Why hasn't the "Initial ITA Request" service changed the "Days since Last Active Service" report?***

The "Initial ITA Request" and "ITA Exception" services are not "active" services and do not transfer to IWDS. Therefore, the date of these services is not included in the Active Service Report.

***I am trying to access a customer in the BHES system but cannot find them. The customer does have an "Initial ITA Request" service in Career Connect. Why can I not find them?***

In most cases, the customer is not attached to the correct Case Manager in the BHES system. To attach the customer to the correct case manager in the BHES system:

1. Make sure that the customer is case assigned correctly in Career Connect. If not, update the case assignment and resave the "Initial ITA Request" service.
2. Check back the next business days after the case assignment has been completed. The assigned Career Coach should be able to access the client in the BHES system. If not, please email the Career Connect Help Desk ([helpdesk@workforceboard.org](mailto:helpdesk@workforceboard.org)).
3. The "Initial ITA Request" service has an "Actual Begin Date" and an "Actual End Date".
4. You only have one "Initial ITA Request" or "ITA Exception" service (if you have more than one, contact The Partnership to have one voided. . If you are still unable to see your participant in BHES, please submit a Help Desk ticket to [helpdesk@chicookworks.org](mailto:helpdesk@chicookworks.org) including the customer name.

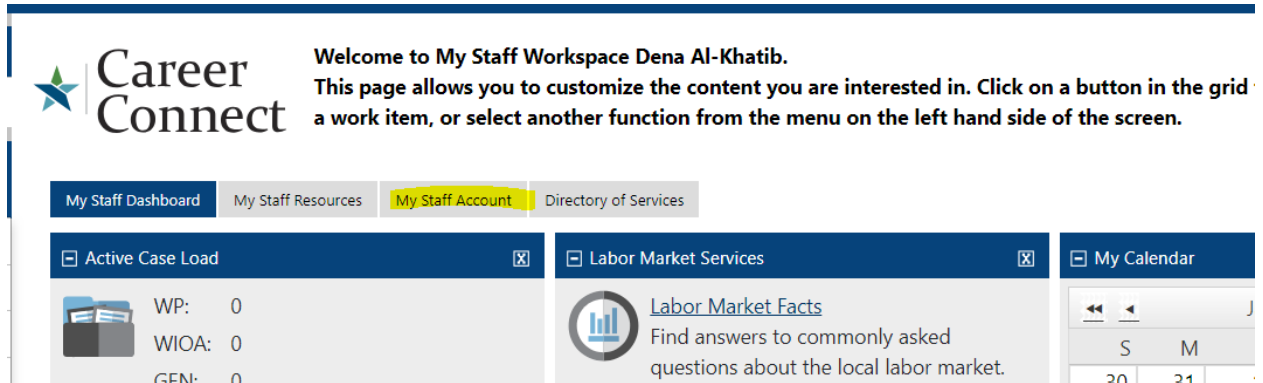
***When I log into the EdAssist / BHES system I get an error message of "Your Email Address cannot be uniquely identified". What should I do?***

This error should be reported to EdAssist at [TARA@edassist.com](mailto:TARA@edassist.com) Please include the error message, your name, and your email address in your email.

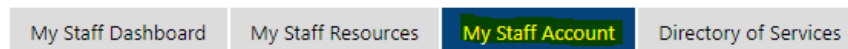
***When I log into the EdAssist / BHES system I get an error message of “Authentication credentials were missing or incorrect”.***

This error indicates that there is a mismatch between the Career Coach’s information in Career Connect and the BHES system. To correct the mismatch:

- 1) Log into Career Connect. From the home page, select the “My Staff Account” tab:



- 2) Check that your last name and email address are correct in Career Connect. If not, update and click “Update Account” at the bottom of the “My Staff Account” screen.



\* Indicates required fields.

**Login Information**

User Name: 4532

Login Name: DALKHATIB

Password: [Change password](#)

Last Changed: 1/14/2019 10:25:35 AM, Dena Al-Khatib

**Name**

\* First Name:

Middle Initial:

\* Last Name:

## E-mail Address

\* Primary E-mail:   
[Create E-mail Account](#)

\* Confirm Primary E-mail Address:

- 3) Go to one of your customers with an “Initial ITA Request” service, and resave the service. This will cause your updated Career Coach account information to transfer to the BHES system the next business day.
- 4) If your account information is in correct in Career Connect or you are still getting the “Authentication credentials are missing or incorrect” message, please email the Career Connect Help Desk (Helpdesk@chicookworks.org) and provide the following information:
  - The error message that you are getting
  - Your Career Connect staff user name (login name)
  - Your first and last name
  - Your email address

## Training Exploration Form

### *So is the Training Exploration form now obsolete?*

No, at least two Training Exploration Forms must be completed and submitted by the client prior to entering the Initial ITA Request service in Career Connect. Save the forms in the client’s hard (paper) file.

### *Will the Training Exploration Form be updated as well?*

Yes, it has been and is available on the Zen Desk in the ITA forms section.

## Initial ITA Request Process

### *What happens if I enter the “Initial ITA Request” service after 7pm Central Time?*

The data will not transfer to BHES until the following night – i.e. it will be two business days before your customer will show up in the BHES system.

### *What do I do if the “Program” (e.g. Adult, Dislocated Worker, and Youth) is incorrect?*

**DO NOT CONTINUE WITH THE APPLICATION.** Contact the Career Connect Help Desk (helpdesk@workforceboard.org) to void the current Initial ITA Request service. Re-enter the service with the correct customer group. The updated information will be in the BHES the next business day.

***What do I do if the customer name is incorrect or changes?***

Correct the customer name in Career Connect. The name will update in the BHES the next business day.

***What do I do if the customer's address is incorrect or changes?***

The customer address that transmits from Career Connect to BHES is the residential address at time of WIOA application (which may be different from the current customer address). If the address at time of WIOA application was entered incorrectly, email the Career Connect help desk ([helpdesk@chicookworks.org](mailto:helpdesk@chicookworks.org)), with the customer name and proof of address, and ask for the WIOA application address to be corrected. The updated address will transmit to BHES the next day. BHES does not need the customer's current address, so if the customer moves, just update the address in Career Connect. There is no need to update it in BHES.

***The BIF form required the Career Coach to indicate whether or not the customer was a veteran, a nursing student, or in other long-term training.***

The purpose of those fields on the BIF was to indicate when a customer qualified for an exception during an ITA shut-down. Now, during a shutdown, Career Coaches will use the "ITA Exception" service in Career Connect and add an appropriate Case Note indicating what the exception is. (If the customer is a veteran his/her veteran status will automatically transmit to BHES.)

***When entering a service in Career Connect, is there an option for 1E on the Statewide Fund drop down menu?***

Yes, when the client has been enrolled in 1E in the application, there will be an option to select the 1E grant on the drop-down menu. The 1E/1N enrollment procedure can be found in the helpdesk under procedures.

**ITA Application & LOC Process in BHES**

***Is the BHES password the same as the Career Connect password?***

Your User Name will be the same as your Career Connect User Name, but you will set a unique password in the BHES system the first time that you log in.

***How do you know the customers' log in information for EdAssist?***

You will no longer use the customer's login. Each Career Coach will have his/her own BHES account. Your BHES User Name will be the same as your Career Connect User Name (and you will set your own BHES password). You will then use the name of your customer to start the impersonation and access their account.

***How do you look up a client's ITA history in the new BHES system?***

The historical data for each customer should be in the system. You may need to check the financial statement to calculate the amount used for tuition vs. books and fees. If you are unsure, contact Anne Hogan ([ahogan@chicookworks.org](mailto:ahogan@chicookworks.org)) or BHES.

***If a customer is going for a license, do we choose certification designation?***

Yes.

***If the payment needs to be made to multiple vendors (for example, the school is receiving the tuition, but another vendor is receiving payment for the books) do we have to submit two applications?***

Yes, you must create two applications in the BHES system, but you only need one “Initial ITA Request” service in Career Connect and only one Financial Statement (attached to both applications).

***How can I print an ITA application?***

In the application summary review from the application history page, if you select the print button in your browser, it will print out the application in a printer friendly format.

How do we distinguish people that have the same name?

Must I always stop impersonation of client A before I can start to type in client B's name, or can I simply just type in client B's name, select client B, and start impersonating client B?

Yes, you will always need to Stop Impersonation of Client A and select Start Impersonation before entering Client B. It is also best practice to Stop Impersonation when you are done in the system and before you log out.

***How do we distinguish people that have the same name?***


BHES uses the client’s Career Connect State ID number (called the User Name in the BHES system). The BHES was updated and now the State ID number displays along with the client’s name in the impersonation box.

See below for instructions on how to find the State ID number in Career Connect.

***How do I find the Career Connect State ID number?***

The State ID number shows up in multiple places in Career Connect, three of which are explained below. It is a unique identifier that can be used to look-up the customer in Career Connect and it is also attached to the customer in BHES.

**Option 1:** Go to Manage Individual > Assist an Individual and search for your client. The State ID number will appear in the search results.

 For help click the question mark icon.

Results View: [Summary](#) | [Detailed](#)

To sort on any column, click a column title.

User Name	First Name	Last Name	SSN	Vet	State ID	Last Login Date	Last Exited	Created	Action	Select
<a href="#">ROLIVER</a>	Oliver	Reed	2111		3917627	11/27/2018		11/27/2018	<a href="#">Summary Tab</a> <a href="#">Case Notes Tab</a> <a href="#">Activities Tab</a> <a href="#">Programs Tab</a>	<input type="checkbox"/>

[Save New List](#)  
[Update Existing List](#)

**Option 2:** Go to Staff Profile > General Profile > Summary and set the filter to “Case Summary”

- [-] My Individual Profiles
  - [+] Personal Profile
  - [+] Search History Profile
  - [+] Self Assessment Profile
  - [+] Communications Profile

- [+] My Individual Plans

- [-] Staff Profiles
  - [-] General Profile
    - [+] Summary
    - [+] Case Notes
    - [+] Activities
    - [+] Documents (Staff)
  - [+] Case Management Profile
  - [+] Report Profile

Summary
Case Notes
Activities

Panel to be displayed:

Case Summary

Individual Information Panel

<p><b>Client:</b> <a href="#">Oliver Reed</a></p> <p><b>Case Manager(s):</b> Reed, Keri (WIOA #366620)</p> <p><b>User Name:</b> ROLIVER</p> <p><b>Case Status:</b></p> <p><b>Veteran:</b> No</p>	<p><b>Age:</b> 21</p> <p><b>Sex:</b> Male</p> <p><b>User ID:</b> 260134</p> <p style="background-color: yellow;"><b>State ID:</b> 3917627</p> <p style="text-align: center;"><a href="#">[ More Individual Information ]</a></p>
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**Option 3:** The State ID appears in the General Information section of the printed WIOA application.

**WIOA APPLICATION  
CareerConnect**

General Information	
<b>Application Status:</b> Application Complete, Ready For Enrollment	
<b>Name:</b> REED, OLIVER	<b>SSN:</b> XXX-XX-2111
<b>AppID:</b> 366620	<b>WIA Converted App ID:</b> Not Applicable
<b>State ID:</b> 3917627	<b>User ID:</b> 260134
<b>LWIA:</b> Chicago Cook Workforce Partnership	<b>Office:</b> Cicero Workforce Center (7600) <b>Office of Responsibility:</b> Cicero Workforce Center (7600)
<b>Assigned Case Manager:</b> Reed, Keri	
<b>Application Date:</b> 11/27/2018	<b>Login Name:</b> ROLIVER
<b>Eligibility Dates</b>	

***How long does it take for a Letter of Credit to be ready once the application is submitted (assuming that there are no problems with the application)?***

The Letter of Credit (voucher) should be issued 3 to 4 business days after the ITA Application is completed in the BHES system. The Partnership strongly recommends that you start the ITA process (by adding the "Initial ITA Request" service in Career Connect) two weeks before training starts to allow time for errors and corrections.

***Where would the letter of credit be sent to after approval?***

The Letter of Credit is sent directly to email address of the Career Coach that is case assigned to the client in Career Connect. Additionally, the assigned Career Coach can download the LOC from the BHES.

***When editing an ITA application in the BHES, do I need to go to New Application again?***

No, you can just edit the existing application. The BHES procedure document has screen shots that show how to edit and application.

***How do I cancel a voucher?***

Please see the BHES Procedure for when and how to cancel a voucher.

***Will supervisors be given access to go into the new system for all customers assigned to their office?***

The Partnership and BHES will determine the feasibility of giving supervisors a login that allows them to see all the clients assigned to their office at a later date.

***What if the Career Coach is out of the office and the customer needs the LOC prior to the Career Coach's return?***

Contact EdAssist at [TARA@edassist.com](mailto:TARA@edassist.com) to request that a copy of the LOC be sent to another staff member.

***What if a Career Coach leaves the organization?***

Re-assign the customers to a new Career Coach in Career Connect. Customers will be attached to the new Career Coach's account in BHES the next business day.

***How can I contact EdAssist?***

- In the Application History, when in summary review, you can add comments on the application to communicate directly with EdAssist about the specific application.
- If you still have questions, contact EdAssist at [TARA@edassist.com](mailto:TARA@edassist.com) or call 866-285-3150.

**Financial Aid & Financial Statement**

***Does the Financial Statement get submitted BEFORE we have the Application Number?***

You will get an Application number once your application, including Financial Statement, are submitted in the BHES system.

***On the Financial Statement in the text box it says that the Career Coach is signing on behalf of the customer. In the box it asks for the customers signature. The form is usually sent blank and then the customer signs when the ITA is picked up. What do we do?***

For now we will keep that line in case the Career Coach needs to sign for the customer. If not, have the customer sign as you have been doing.

***If a customer is receiving financial aid, should this amount be deducted from the requested voucher amount, or should we wait until the financial aid has been exhausted?***

Usually you will not submit the request until the customer has exhausted their financial aid. However, if there is financial aid at the time of application you would deduct the financial aid.

***Customers are given a private loan in order to hasten the ITA process. What happens if they are asked to pay monthly during the last portion of their training?***

They may be eligible for an ITA as most student loans are not paid off prior to graduation.

## **ITA Policy Questions**

### ***Can a customer be enrolled in Paid Work Experience and an ITA at the same time?***

Yes, as long as they can go to class.

### ***How are the career coaches suppose to identify customers in their last semester?***

The customer needs to come in prior to their last semester to determine eligibility, suitability and at what point they would be eligible for WIOA assistance.

### ***What is the lifetime limit for ITAs?***

The lifetime limit for tuition (not including books, fees and tests) is \$8,000. Please see our ITA Policy Letter for more details.

### ***If a client had an ITA in the past, but did not exceed the \$8,000 limit, does The Partnership need to approve using the remaining ITA balance?***

The Partnership recommends checking with Anne Hogan ([ahogan@chicookworks.org](mailto:ahogan@chicookworks.org)) and Gaby Ore ([gore@chicookworks.org](mailto:gore@chicookworks.org)) in advance if the customer is returning for a second ITA.