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 International Scholarship & Tuition Services (ISTS) 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.

ITA Requirements

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

- The Participant must submit the two - three training program exploration forms and select a training provider and program
- The Career Coach must:
    o Enter the numeracy and literacy scores.
    o Certify the participant for training (Adults and Dislocated Workers).
    o Create the Individual Employment Plan (IEP) / Individual Service Strategy (ISS).
    o Enter the Develop IEP/ISS service.
    o Assign a Career Coach to the WIOA application.
- Case Note Requirements
    o <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.
    o <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.
        ▪ 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 **NEW!** <u>All Occupations in Yellow require a case note.</u> 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 Requirements
  - Participants must be 21 or older

Apprenticeship Requirements

Customers attending an Apprenticeship need to have the Initial ITA Request service entered in Career Connect:

- 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.
  - Add Case Note for Training Justification (see Case Note Guide)
  - Once participant begins their training enter code 315: Registered Apprenticeship Program (RAP).
  - The 2nd ITA Policy also to applies to Apprenticeships.
- Case Note Requirements
  - 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.

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

2. 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	205 - Develop IEP -Same Day Service Business And Career Services Inc.	W	Adult	N/A	09/18/2018	09/18/2018	09/18/2018 Successful Completion
C	203 - Case Management -Same Day Service Employment And Employer Services	W	Adult	N/A	09/18/2018	09/18/2018	09/18/2018 Successful Completion

3. In the General Informaton 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:**	Chicago Cook Workforce Partnership ▼ LWDB cannot be modified if staff has local region assignment.
* **Office Location:**	Chicago Cook Workforce Partnership ▼

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:
     - o 231 Initial ITA Request (Same Day Service) for Adult,
     - o 235 Initial ITA Request (Same Day Service) for Dislocated Worker, or
     - o 423 Initial ITA Request (Same Day Service) for Youth.

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*.

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.

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.

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 Succesful Completion. *If Succesful Completion is not selected, the service will not be sent to ISTS 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: 10/11/2018 📅 Today

Completion Code: Successful Completion ⌄

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: 10/11/2018 📅 Today

Completion Code: Successful Completion ⌄

Case Notes:

[Add a new Case Note | Show Filter Criteria]

ID	Create Date	Subject	Action
No data found.			

<< Back   Finish   Delete

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 5:45pm Central Time (CT)**, then the information to set up the application for this particpant will be transferred to ISTS overnight. The next business day, you will be able to continue with the ITA application in the ISTS data system. **NOTE:** *Please DO NOT enter any Initial ITA Request services after 5:45pm Central Time (CT) on Friday.* *Any Initial ITA Request services entered after the deadline above will not transfer to ISTS.* *You can resume entering the Initial ITA Request service on Monday at 8am Central Time (CT).*

What if my information is not in International Scholarship & Tuition Services (ISTS)?

If you do not receive an email from ISTS the next business day indicating you can now proceed with the application, 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 ISTS the next business day. If you still have not received an email from ISTS, please submit a Helpdesk ticket to helpdesk@workforceboard.org including the customer name and CC State ID number.

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 you client qualifies for an ITA exception, please email your Program Relationship Manager (PRM). If you are not sure who your PRM is, please contact Patti Prado at pprado@chicookworks.org