RiversEast
WORKFORCE DEVELOPMENT BOARD

Technical Assistance (TA) Guide – Occupational Skills Training

This TA Guide is to provide the program operator with additional guidance when sponsoring a participant in Occupational Skills Training. This TA Guide is not meant to be all-inclusive. It is the responsibility of the program operator to review all applicable policies to ensure proper documentation and allowable expenditures.

Steps that should be followed when sponsoring Occupational Skills Training:

1. Financial Aid Analysis (FAA)
    i.   Should be representative of the TOTAL cost of attendance for that semester
    ii. All totals must be updated and calculated to determine need
    iii. ITA cannot be written for more than the resources needed total
    iv. Be sure to check the box IF the college representative does not sign
    v.   Documentation used to complete the FAA should be scanned with the FAA (data validation requires documentation for the "begin" date of training).

2. Individual Training Account (ITA)
    i.   Training and training provider must be on the approved list
    ii. Should not be scanned in NCWorks unless signed by Career Advisor and Program Supervisor
    iii. Class schedule and anticipated book/supply costs should be uploaded with the initial ITA when issued
    iv. Once received from Training Provider, the "redeemed" ITA and invoice/receipt must be scanned in NCWorks

3. Activity codes
    i.   Projected/Actual Begin date and the Projected End date should match the supporting documentation used to complete the FAA. To pass data validation, once the registration statement or transcript is received the "actual" begin and end date MUST be updated to match the "actual" training dates.
    ii. Must obtain a withdrawal or drop-out form when participant drops or withdraws; end date of activity must match drop-out form; this again is to pass data validation

4. IEP
    i.   Training and ALL supportive services needed must be listed on IEP

1. The 'plan' tab cannot just be updated when something changes on the IEP. When changes are made, the IEP MUST be printed, signed by the Career Advisor and the participant AND scanned in NCWorks. Remember to record the IEP update activity. Activity date should match the date signed on the IEP.

5. Supportive Services
    i. Effective July 1, 2021, per State policy, supportive services must be listed on the IEP, the Objective Assessment and in case notes
    ii. Transportation: class and/or clinical schedules along with MapQuest results must be scanned into NCWorks to pay mileage
        1. Uber use MUST have prior approval from the Local Area

6. Transcripts: are required for data validation; all participants should sign a Release of Information and a FERPA form during enrollment. Most colleges will require the participant to take the FERPA form back to the college. When the semester ends, do not wait for the participant; you can forward the Information Release to the college and request a transcript (as the FERPA form should already be on file). Once received, the transcript is scanned in NCWorks.

7. Credential/MSG: must be recorded when the transcript is scanned in NCWorks

8. Transcripts are required at the end of each semester to monitor GPA and to record and document MSG.

Applicable policies:

- ITA Voucher Policy
- Supportive Services
- NCWorks Online Service Activity Codes and Definitions: Guidance on Case Notes and Exit Dates