

Technical Assistance (TA) Guide – Occupational Skills Training

This TA Guide is to provide the service provider 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 service provider 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)
		1. Should include “total” cost for the semester (this includes living expenses as well as training costs)
		2. All totals must be updated and calculated to determine resources needed
		3. ITA cannot be written for more than the total of resources needed
		4. Be sure to check the box IF the college representative does not sign
		5. 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)
		1. Training and training provider must be listed on the approved Training Provider (ETPL) list for Rivers East.
		2. Should not be scanned in NCWorks unless signed by Career Advisor and Program Supervisor
		3. Class schedule and needs list need to be scanned into NCWorks
		4. Once received from Training Provider, the “redeemed” ITA and invoice/receipt must be scanned in NCWorks
	3. Activity codes
		1. 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.
		2. Must obtain a 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
		1. Training and all supportive services needed must be listed on IEP/ISS and on the OA.
	5. Supportive Services
		1. Make sure all supportive services are listed on IEP/ISS and OA.
		2. If paying mileage, class and clinical schedule, if applicable, are required to be scanned into NCWorks.
		3. Needs list required for items purchased
	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 Service Activity Codes, Case Notes and Exit Dates
* Program Exit, Follow-up and ReEnrollment
* Residency Requirements