

TRIDENT

VOS INSTRUCTION LETTER 06-06 INCUMBENT WORKER TRAINING (IWT)

TO: Trident Workforce Investment Area Contractors and Staff

ISSUANCE DATE: February 16, 2007

EFFECTIVE DATE: Immediately

SUPERSEDES: N/A

SUBJECT: VOS Instructions for Locally Funded Incumbent Worker Training

PURPOSE: To transmit VOS Instructions for Locally-funded IWT.

BACKGROUND: See attached Instruction Letter

POLICY: See attached VOS Instruction Letter 06-06

PROCEDURES:

Inactivate VOS Instruction 06-02. See attached VOS Instructions for locally funded IWT.



Ronald Mitchum, Executive Director
BCDCOG

June 27, 2012

Date



Mark Sanford
Governor

SOUTH CAROLINA
DEPARTMENT OF COMMERCE

Joe E. Taylor, Jr.
Secretary

SC VOS INSTRUCTION NUMBER 06-06

TO: Local Workforce Investment Area Administrators
Workforce Development Staff, IT Staff

SUBJECT: VOS Instructions for Locally-funded Incumbent Worker Training (IWT)


ISSUANCE DATE: February 16, 2007

EFFECTIVE DATE: February 16, 2007

Attached are the VOS Instructions for Locally-funded Incumbent Worker Training (IWT). Please distribute copies of this instruction to your staff as necessary.

Inactivate VOS Instruction Number 06-02, VOS Instructions for Statewide Incumbent Worker Training.

If you have any questions concerning this matter, please call Mike Daniels at (803) 737-2423.


Margaret Torrey
Deputy Secretary for Workforce

Attachment

VOS Instructions for Locally-funded Incumbent Worker Training

Locally-funded IWT Agreements must be tracked as an employer service for federal reporting under WISPR. These services will be tracked in the employer account in VOS by following the steps below:

Employer Account:

- Check to see if the employer/third-party broker already has a VOS Account.
 - Click on Manage Employers.
 - Click on Assist an Employer and search for the employer by name.
 - If an account exists, review the account to ensure that the information is correct. Add any additional worksites/contacts as needed.
 - If no employer/broker account exists, create an employer account.
- To create an Employer Account:
 - Click on Manage Employers.
 - Click on Create an Employer Account.
 - Complete all required fields for the general corporate section.
 - Save your entry.
 - Add additional worksites/contacts if needed.
- Click on Case Management Profile.
 - Click on Activities.
 - Click on Service Plan.
 - Click on Add Service.
 - For Service Type, select “**E09, Local Adult IWT Agreement**” or “**E10, Local DW IWT Agreement**”. Complete required fields.
 - Put the start date of agreement in the Scheduled Date field.
 - Leave the Actual End Date blank.
 - For Contact Method, select Written Correspondence.
 - Enter the Agreement Number and projected end date in the Comments box.
 - Case notes may also be added to the Employer Account.

To create the drop-downs for the Activity Records, the locally-funded IWT employers must be set up in the Manage Fund Tracking section of VOS as Local Training Providers and each training course must be listed as described below:

IWT Training Providers:

- Each new IWT employer or third-party broker for locally-funded IWT agreements must be set up in IFT as a training provider for your local area.
- To check for new IWT employer/third-party broker:
 - Click on Manage Fund Tracking.
 - Click on Manage Providers.
 - Search for employer/broker name.
- If the employer/broker is **not** on the your local area provider list, complete the following steps:

- Click on Add Service Provider.
- Enter the required information in the **General Tab**, following the special instructions below:
 - Vendor ID: Enter the **Federal Employer Identification Number (FEIN)**.
 - Provider Name: Enter the **Employer/Third-Party Broker Name**.
 - Address: Enter the **Employer/Broker Address**.
 - FEID: Enter the **Federal Employer Identification Number (FEIN)**.
 - Provider Type: Check **PS-Training Non-ITA only**.
 - Complete other required fields and **Save**.
- Go to the **Locations Tab**, and enter the required information for any additional locations for this employer/broker covered by the local IWT agreement.
- Go to the **Contact Info Tab**, and enter a contact for each additional location.
- Go to the **Courses/Services Tab**, and enter information for each course covered by the IWT Agreement, following these special instructions:
 - Customer Group: Check **WIA-Adult or Dislocated Worker based on the fund stream of the agreement**. If the employer has both an Adult and a DW local IWT Agreement for the same training, check both boxes.
 - Provider Type: Check **PS-Training Non-ITA only**.
 - Program Name: Enter the name of the training course.
 - Description: Enter a brief description of the training course.
 - Non-Cost Item: Select “Yes”.
 - Locations Offered: Check “Offered” for the appropriate locations.
 - Enter other applicable information, and save.
- If the employer (or third-party broker) is on the Provider List, complete the following steps:
 - If the employer/broker is inactive, activate the employer/broker.
 - If the appropriate location(s) has/have already been created and is (are) active, leave the status active.
 - If your location has not been created, create your location as described above.
 - Also enter or edit the **Contact Information Tab** as needed.
 - Check the **Courses/Services Tab**. Add new courses and/or update Locations Offered for courses that are already listed.

When the term of your IWT agreement has expired, complete the following steps:

- **Go to Manage Employers:**
 - Click on Case Management Profile.
 - Click on Activities.
 - Click on Service Plan.
 - Open the IWT Agreement and enter the Actual End Date of the Agreement and the Service Status. Add any appropriate comments.
- **Go to Manage Fund Tracking:**
 - Click on Manage Providers.
 - Search for and select the provider.
 - Go to the Courses/Services Tab and change the Locations Offered selection to “Not Offered” **AND**

- Go to the General Tab and change the status to “inactive”.

All locally-funded IWT participants must be entered into VOS because they will count in Local and State performance measures (for Employment Retention and Average Earnings) and will be included in Data Validation. Please follow the special VOS data entry requirements specified below.

Locally-funded IWT Participants:

- A spreadsheet signed by the Employer Representative will be provided within 10 days of the training Actual Start Date and will contain the following information for each participant:

Participant Name	Participant SSN
Date of Birth	Disability
Gender	Race
Ethnicity	Veteran
Campaign Vet	Recently Separated Vet
Disabled Vet	Limited English Proficiency
Highest Grade Completed	Current Hourly Wage
Training Course Name	ONET Code (if applicable) for Training
Actual Training Start Date	Projected Training End Date

- A spreadsheet signed by the Employer Representative will be provided within 10 days of the training Actual End Date and will contain the following information for each participant:

Actual Training End Date	Completion Status
Type of Certificate Received	

The header of the employer spreadsheets will contain information identifying the Agreement Number, Training Course Name, etc. and local area administrative staff will select Adult or Dislocated Worker funding. Templates for the spreadsheet will be provided separately.

- **VOS Entry Requirements for IWT Participants:**

- For all VOS screens listed below please enter information as provided on the employer spreadsheet. If the information is not available on the employer spreadsheet, then enter “No”. On all screens that ask for Office or Location, select “**IWT LWIA Name**”.
 - Individual Membership
 - Enter “**IWT**” for the street address. Enter a city, state and zip.
 - Enter “**000-000-0000**” for the phone number.
 - WIA Youth or Adult/DW Core and Intensive/Training Application
 - Determine eligibility for Adult or DW depending on the funds used in the local IWT Agreement.
 - Use staff as alternate contact.
 - The Application Date and Eligibility Date will match the Actual Start Date of the training.
 - Select **IWT LWIA Name** for Office of Responsibility.
 - Select **Yes** for Selective Service for those males born after 12/31/59.

- Select **Citizen** for Citizenship and **Other, employer record** as verification source.
- Employment status will be **Employed**.
- Family Size will be **1**.
- Family Income will be **9999999.99**.
- Set Self-sufficiency to **Eligibility Override**.
- For adult eligibility, also set eligibility to **Eligibility Override**. **OR** For dislocated worker eligibility, set eligibility to **Eligibility Override**. Choose either adult **or** DW eligibility based on the fund stream specified in the IWT Agreement.
- Note that selecting **Eligibility Override** for the self-sufficiency and eligibility fields causes no eligibility rules to run in the system. Therefore, these participants should not receive any services other than the locally-funded IWT training.
- For Dislocated Worker eligibility:
 - ◆ Set “Have you received a termination or layoff notice from your last job or, if still employed, current job? Dislocated Worker program only.” to **No**.
 - ◆ Do not enter any information on the Dislocation Employer.
 - ◆ Do not enter a Dislocation Wage.
- In Comments, enter “**Eligible for Local IWT Adult Program only**” or “**Eligible for Local IWT DW Program only**”.
- **Do not assign the participant to a case manager.**
- Participation Record
 - Participation Date must be the Actual Start Date of the Training.
 - Employment Status must be **Employed**.
- Activity Record
 - Customer Group: Select **Adult or Dislocated Worker**.
 - Activity Code: Select **325, Employed Worker Skills Upgrading/Retraining**.
 - Provider: Select the **Employer/Broker Name**.
 - Course: Select the appropriate **Training Course**.
 - ONET Code: Enter an ONET Code for occupational skill training as appropriate. Do not enter an ONET code for soft skills, basic skills or English as a Second Language.
 - Credential: Select **Yes** only when the credential earned meets the definition of Certificate found in TEGL 17-05.
- Since the IWT Agreement is between the local area and the employer/broker, the IWT participants will not be required to sign any WIA forms and individual participant hard copy case files will not be maintained. The employer spreadsheets (signed by the employer/broker) will be used for monitoring.
- VOS will automatically exit these participants after 90 days with no service. Therefore, no Outcome Record will be keyed into VOS.
- Follow-up records will not be entered into VOS for the locally-funded IWT participants. Data for employment, retention and wages after exit will be obtained from wage records only.