

Keys to Progress Data Entry I-Trac Guide

1. Search for the participant in I-Trac. Using *Find A Customer*, search for the participant record and click Select.

- If the customer is in I-Trac confirm Birth MM/DD and Last 4 SSN (if available) to verify that you are selecting the correct customer in I-Trac.

Find a Customer:

Last Name	First Name	I-Trac Customer ID	WS Job Seeker ID
test	testr2		

Search Results / Add Customer:

Last Name	First Name	MI	Birth MM/DD	Last 4 SSN	I-Trac CustomerID	WS JobSeekerID	Recent Fund Activity
Test	Testr2		01/01	REFUSED	1993908	2587682	HCNW, Housing Works, BTWO3, Re

- If the customer is not in I-Trac select the [add](#) button next to *Search Results/Add Customer* and add the customer to I-Trac.

Find a Customer:

Legal Last Name	Legal First Name	I-Trac Customer ID	WS Job Seeker ID	Email
Test	Keys			

Search Results / Add Customer:

2. Add the Keys to Progress Provider.

- On the Providers Tab, click [add](#) in *Providers Control* to add the Keys to Progress enrollment.
- Service Provider = Keys to Progress- Your Organization
- Customer Of = Choose Your Name
- Application Date = The date the customer is completing the registration process (NOTE: This date must be before the date of the first Keys to Progress grant funded service).

Providers

Service Provider	Customer Of
WorkSource DW - WSPM Central	

3. Complete *Registration Tab* data entry. All required data (**yellow fields**) on the *Registration Tab* must be entered to complete Registration.

Registration Tab

Career Coaches create the I-Trac Keys to Progress record and complete the *Registration Tab*.

Address:

Types: Home, Home/Mailing, Mailing, Homeless. Homeless type use the provider's address

Phones

Email Address

Secondary Contact:

Can be entered to have a contact for someone when you can't contact the participant

Ethnicity

Race

Other Demographics

Birth Date:

Enter the DOB and the documentation used to verify this. A copy of this document is not required to be maintained in the file. To be eligible must be age 18+

Employment Status

Current Employment or Last Job Worked

Employment Characteristics: To be eligible must choose one

- Fleeing or attempting to flee domestic or other violence
- Homeless
- Qualified as homeless before moving into their current housing

Economic Characteristics: Choose all that apply

Registration Results		
	Missing Information	Ineligible Reasons
	(All required registration information has been entered)	(Eligible)
Registration Completion		
	Application Date	Registered By
edit	11/29/2021	Brenk, Kari

Registration Results Control will tell you what information is missing or any ineligible reasons. If no *Ineligible Reasons* are listed complete the *Registration Results Control* for *Registered By*. Once registration is completed go to the *Customer Documents Menu* and print and have the participant sign the Application. The first service on the *Services Tab* sets the *Participation Date*.

The screenshot shows the I-Trac system interface. At the top, there is a navigation bar with tabs: Home, I-Trac, Workshops, User Admin, Login, Resources, Batch Reports, Batch Entry, WEX Bank, and Reports. Below this, there is a sub-navigation bar with tabs: Providers, Registration, Assessments, Goals, Services, Payments, Outcomes, Case Notes, and Reports. The main content area displays the 'Registration Results Control' for a customer named 'Testr2 Test' (I-Trac ID: 1993908). The 'Missing Information' section shows '(All required registration information has been entered)' and the 'Ineligible Reasons' section shows '(Eligible)'. A red circle highlights the 'customer documents menu' link in the top right corner of the interface.

Services Tab

Must complete all fields in **yellow**.


Services Control: Services must have a *Start and End Date* with a Status of *Completed*. Do not utilize the Status of *Next Step* or *Started*. Can edit a record of a *Completed* Status to *Not Completed* or *Cancelled*.

- Career and Resource Planning
- Career Coaching
- Career Mapping Workshop
- Job Search Assistance

add Services					
	Start Date	End Date	Service	Status	Location
edit delete	12/1/2021	12/1/2021	Career and Resource Planning	Completed	n/a
edit delete	12/1/2021	12/1/2021	Career Coaching	Completed	n/a
edit delete	12/1/2021	12/1/2021	Career Mapping Workshop	Completed	n/a
edit delete	12/1/2021	12/1/2021	Job Search Assistance	Completed	n/a

Training, Post-Secondary Education & Employment Skills Control: Services must have a Start and Target End date.

- Pre-Requisite Training
- OST
- Pre-Apprenticeship Training
- Workforce Prep
- Entrepreneurial Training

add Training, Post-Secondary Education & Employment Skills						
edit delete	Start Date	End Date	Target End Date	Service	Status	Location
	12/1/2021		3/30/2022	Pre-Apprenticeship Training	Started	n/a
	Industry (NAICS)		Target Position (ONET)		Target Sector	Course of Study (CIP)
	Construction		Construction and Related Workers, All Other			46.0415, Building Construction Technology.
	Training Provider			Course Name		Pell Recipient
	Portland Youth build					No
	WIOA ITA	Trade Act		Planned Credential or Measurable Skills Gain		
	No	No		Industry Recognized Certificate or Certification		
Last Modified By		Date Modified				
Brenk, Kari		12/2/2021				

Work Based Training Control: Services must have a Start and Target End date.

- Internship/Work Experience

add Work Based Training						
edit delete	Start Date	End Date	Target End Date	Service	Status	Location
	12/1/2021		3/30/2022	Work Experience	Started	n/a
	Worksite Name		Industry (NAICS)		Position (ONET)	
	worksystems inc		Administrative and Support and Waste Management and Remediation Services		Secretaries and Administrative Assistants, Except Legal, Medical, and Executive	
	Hourly Pay	Hours/week	Benefits	Planned Credential or Measurable Skills Gain		
			No Benefits	Employment		
WEX Hours Completed			Last Modified By	Date Modified		
			Brenk, Kari	12/2/2021		

Updated 12/2021

Payments Tab

All payments made with funds in the Keys to Progress contracts are tracked on the *Payments Tab*. Do not enter payments provided by other funding sources into the Keys to Progress record. Must complete all fields in **yellow**.

Payment Plan Control: A Payments Plan is not required; however, the tool may be used if it is helpful to the Career Coach in managing the participant's resource plan. Planned Payments show in the Payment Overview and as Payments are made the Plan amount is reduced by the Payment amount to reflect current unpaid obligations.

Training & Education Service Payments Control: **Paid for and entered by the Career Coaching provider.** Payments for training services. Must have a *Training, Post-Secondary Education & Employment Skills* record on the *Services Tab*.

add	Training & Education Service Payments						
Total Training & Education Service Payments: \$500.00							
edit delete	Date	Status	Service	Service Status	WIOA ITA	Payment Type	Amount
	12/2/2021	Paid	Occupational Skills Training (12/01/2021)	Completed	No	Tuition/Fees/Books/Supplies	\$500.00
	Paid To		Fiscal Reference	Location		Staff	
	participant			n/a		Kari Brenk	

Support Service Payments Control: **Paid for and entered by the Career Coaching provider.** Refer to the *Keys to Progress Regional Program Standards* for definitions.

add	Support Services Payments						
Total Support Service Payments: \$50.00							
edit delete	Date	Status	Payment Type	Amount	Paid To	Other Resources Unavailable	Timeframe
	12/1/2021	Paid	Transportation	\$50.00	customer	Yes	One Time Payment
	Fiscal Reference		Justification	Location	Staff		
			transportation for housing search	n/a	Kari Brenk		

Rent Assistance Need Control:

No need to complete this control.

Rent Assistance Management Control:

It is the Rent Assistance Coordinator's role to add the referral under the *Rent Assistance Management* control. Choose the *Housing Type* of *Homeless*. Enter the initial referral as a Status of Pending when the referral is made and then update the status to Approve or Not Approved once the referral has been finalized.

add Rent Assistance Management							
Total Rent Assistance Payments: \$2000.00							
	Referred Date	Referred Staff	Service Point ID	Housing Type	Status	Approval Date	Approval Staff
save cancel	12/1/2021	Kari Brenk	22222	Homeless	Approved	12/1/2021	Kari Brenk
					--Select One-- Pending Approved Not Approved		
add Rent Assistance – Program Engagement							
	Date	Engaged				Modified By	Mo

Rent Assistance- Program Engagement Control:

Career Coaches must verify program engagement. Service engagement must be entered by the 10th day of each month in each month the participant is searching for rent assistance, and then each subsequent month that rent assistance is received until rent assistance ends. **The Rent Assistance Coordinator must verify monthly services by the Career Coaching provider prior to the rent payment being released.** Engagement is verified for the current month and rent is paid in the current month for the next month.

Rent Assistance – Program Engagement			
	Date	Engaged	
save cancel	12/1/2021	<input checked="" type="checkbox"/> Attending Career Coach Appointments <input type="checkbox"/> Gap in Service <input type="checkbox"/> Career Plan Goals Progress <input type="checkbox"/> Career Coach Weekly Contact <input type="checkbox"/> Employed <input type="checkbox"/> Job Searching <input type="checkbox"/> Training <input type="checkbox"/> Not Engaged	▼ Status Modifier
add Rent Assistance Payment			
	Date		
	Funding Source		

Rent Assistance Payment Control:

Each time a rent assistance payment is made on behalf of the participant, the Rent Assistance Coordinator will enter the payment information in I-Trac. Separate payment information must be entered for each type of payment. Choose *Housing Type of Rapid Re-Housing* for all payments. Refer to the *Keys to Progress Regional Program Standards* for payment definitions.

add Rent Assistance Payment								
	Date	Payment Type	Paid To	Status	Month	Year	Amount	Housing Type
edit delete	12/14/2021	Move-In Fee	Lanlord	Paid	December	2021	\$100.00	Rapid Rehousing
	Funding Source		Rent Assistance Eligible	Modified By		Modified Date		
	Keys to Progress		Yes	Kari Brenk		12/14/2021		
	Date	Payment Type	Paid To	Status	Month	Year	Amount	Housing Type
edit delete	12/14/2021	Rent	Landlord	Paid	December	2021	\$750.00	Rapid Rehousing
	Funding Source		Rent Assistance Eligible	Modified By		Modified Date		
	Keys to Progress		Yes	Kari Brenk		12/14/2021		

Outcomes Tab

The following Keys to Progress contract outcomes are tracked and managed through the *Outcomes Tab*:

Attainment of Unsubsidized Employment
Attainment of Career Track Employment
Retention in Employment
Percent of participants who reside in permanent housing at the time of their exit from program

Program Status Control:

The following program statuses are entered by the Career Coach as appropriate.

- **Exit-** Manually entered when a participant has completed all program services and is ready to be exited
- **Exit-Deceased, Family Care, Health/Medical Reasons, Institutionalized**
Refer to the *Key to Progress Regional Program Standards* for definitions. These Exit types remove participants from all performance
- **Auto Exit:** Will auto populate if a record goes more than 90 days without a service entered.

add Program Status		
	Program Status	Date
	Exit Removed	11/4/2021
	Participation	4/12/2021
	Registration	4/1/2021
	Application	4/1/2021

Credential Control: Entered when a participant earns a DOL defined Credential. See credentials definition.

add Credentials					
	Date	Credential Type	Credential Name	Status	Documentation
edit delete	12/2/2021	Occupational Skills Licensure awarded by a government agency	LPN	Attained	License
	Related Training/Education Service		Last Modified By	Date Modified	
	Yes: Occupational Skills Training (12/01/2021)		Brenk, Kari	12/2/2021	

Housing Status at Exit Control:

At Exit enter one of the following types of housing status. This control must be completed before you can enter a manual Exit status in the *Program Status Control*.

- Permanent Housing
- Transitional Housing
- Shelter
- Street/Car
- Other, See Case Notes

edit	Housing Status at Exit
	Housing Status at Exit
	Permanent Housing

Employment Information Control:

Enter a record when a participant obtains employment. This control will show all in-program and post exit employment. New employment records require a two part save, shown below where the employer details are entered and saved before the pay and benefits are entered and saved. This allows multiple pay/benefits entries to one job, further allowing staff to show wage increase over time by saving with a new effective date. Updates like wage increases or termination dates related to employment are made in this control.

add	Employment Information					
	Start Date	End Date	Employment Type	Employer	Industry (NAICS)	
edit delete	12/1/2021		Unsubsidized Employment	WorkSystems, Inc	Administrative and Support and Waste Management and Remediation Services	
	add	Date	Position (ONET)	Hourly Pay	Hours/Week	Benefits
		12/1/2021	Secretaries and Administrative Assistants, Except Legal, Medical, and Executive	\$15.00	20.00	No Benefits

Employment Confirmations Control:

The employment record will only count towards performance if there are Employment Confirmations. From the drop down choose the Confirmation Type. Types are for Employment and Career Plan Employment Before Exit, At Exit and Q1, Q2, Q3 an Q4.

add	Employment Confirmation			
	Date	Confirmation Type	Status	Confirmation Detail
edit delete	12/2/2021	Before Exit Employment Confirmation	Working	WorkSystems, Inc, Secretaries and Administrative Assistants, Except Legal, Medical, and Executive, Started: 12/01/2021
	Confirmation Period		Staff	Related Training Services
	12/01/2021 - 12/02/2021		Karl Brenk	No

Case Notes Tab

Narrative case notes are not a service but *may* be completed in I-Trac to document additional detail around participation activities; successes and challenges; progress towards goals; and performance outcomes. Narrative case notes entered should not repeat information already entered in the I-Trac system, but expand upon, provide context to or augment service or employment data.