

# Prosperity 10,000 I-Trac Data Entry Procedures

---

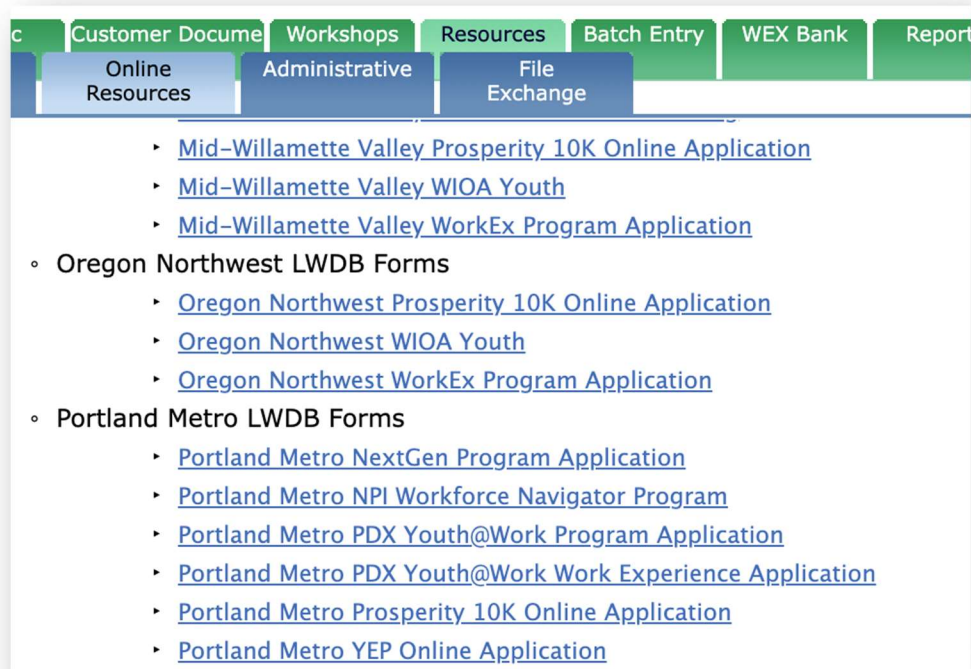
## I. Registration

A P10k record and registration can be started in one of two ways:

- A. Use the P10k Online Application to create the new record and complete the remaining required data elements within the Registration Tab.
- B. Add a new record directly from the Providers Tab and complete all data elements within the Registration Tab.

### **Option 1: Prosperity 10K Online Application**

The online application can be found by going to the Resources Tab --> Online Resources. Scroll down to Portland Metro LWDB Forms and click the link for Prosperity 10K Online Application.



# Prosperity 10,000 I-Trac Data Entry Procedures

Complete the form in its entirety to create a new provider record in I-Trac.

## Future Ready Oregon Portland Metro Prosperity 10,000 Programs

Thank you for your interest in training and employment services. Completing this online application is the first step in the application process for this program. Information submitted will be kept confidential and only used by authorized program staff to conduct program eligibility, provide services, and track & report program performance to funders.

\* indicates required field

---

**Provider\***  
--Select One--

---

<b>Legal Last Name*</b>	<b>Legal First Name*</b>	<b>MI</b>	<b>Other/Preferred Name</b>	<b>Pronouns</b>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<b>Birth Date*</b> (MM/DD/YYYY)	<b>Age</b>	<b>Sex*</b>	<b>Gender*</b>	
<input type="text"/> / <input type="text"/> / <input type="text"/>	<input type="text"/>	<input type="radio"/> Female <input type="radio"/> Male <input type="radio"/> Not Disclosed	<input type="radio"/> Woman <input type="radio"/> Man <input type="radio"/> Nonbinary or Genderqueer <input type="radio"/> Not Disclosed	

---

**Social Security Number** [Why we collect your SSN](#)

---

**Email Address\***

**Home Address\***    **Apt/Unit #**    **Zip\***    **City\***    **State\***    **County\***

               OR    --Select One--

**Mailing Address\***     Same as home    **Apt/Unit #**    **Zip\***    **City\***    **State\***    **County\***

                   OR    --Select One--

Applicants must provide at least one phone number.

<b>Home Phone</b>	<b>Cell Phone</b>	<b>Message Phone</b>	<b>Other Phone</b>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

---

**Ethnicity\***    **Race\*** (Check all that apply)

Hispanic or Latino a/x     American Indian or Alaskan Native  
 Not Hispanic or Latino a/x     Asian  
 Not Disclosed     Black or African American  
 Native Hawaiian or Other Pacific Islander  
 White  
 Not Disclosed

---

**Check all the following characteristics that apply to you\***

Homeless/Housing Insecure  
 Incarceration (Current or Past)  
 LGBTQ+  
 Oregon Tribal Member - Burns Plateau of Harney County  
 Oregon Tribal Member - Confederated Tribes of Coos, Lower Umpqua, and Siuslaw Indians  
 Oregon Tribal Member - Confederated Tribes of Grand Ronde  
 Oregon Tribal Member - Confederated Tribes of Siletz  
 Oregon Tribal Member - Confederated Tribes of Umatilla Reservation  
 Oregon Tribal Member - Confederated Tribes of Warm Springs  
 Oregon Tribal Member - Coquille Indian Tribe  
 Oregon Tribal Member - Cow Creek Band of Umpqua Indians  
 Oregon Tribal Member - Klamath Tribes  
 Person with a Disability  
 Receiving Refugee Cash Assistance  
 Receiving SNAP anytime in the last month  
 Receiving Supplemental Security Income  
 Receiving TANF  
 Rural and Frontier Communities  
 Veteran (Not Dishonorable)  
 None Apply

---

**Employment Status\***

Employed     Never Employed     Not Employed

---

**Household Size\***    **Household Income (Annual)\***

   \$

---

# Prosperity 10,000 I-Trac Data Entry Procedures

Once the application is submitted, a new Prosperity 10k record will be created in I-Trac, with an Application Date. To complete the Registration process, search for the participant in I-Trac, open the P10k record, and complete the remaining data elements within the Registration Tab.

## **Option 2: Registration Tab**

Alternatively, a P10k record can be added directly to a participant's I-Trac record from the Providers Tab, and registration can be completed in its entirety on the Registration Tab.

- 1) When in a participant's I-Trac record, click "add" next to "Providers."

add Providers	
	<b>Service Provider</b>
select	WorkSource Adult - LWA Portland Metro - WSPM B-H
select	⋮ EOP Portland - SE Works - PDX Reentry
select	⋮ WorkEx - LWA Portland Metro - WSPM B-H

- 2) From the dropdown list of providers, select the P10k provider you are associated with. Enter your name in the "Customer Of" field and enter the Application Date. Click "Save" to finish creating the record.

add Providers	Service Provider	Customer Of	Application Date	Registration Date	Participation Date	Exit Date
select	WorkSource Adult - LWA Portland Metro - WSPM B-H	Brenk, Kari	8/8/2022	8/8/2022	8/12/2022	
select	⋮ EOP Portland - SE Works - PDX Reentry	Cassidy, Talitha	9/22/2022	9/22/2022	9/22/2022	
select	⋮ WorkEx - LWA Portland Metro - WSPM B-H	Brenk, Kari	8/12/2022	8/12/2022	8/12/2022	
edit	Prosperity 10K - SE Works	Finnegan, Tim	10/31/2022			

- 3) Proceed to the Registration Tab and complete all the data entry fields.
  - i. Address
  - ii. Phone number(s)
  - iii. Email address
  - iv. Sex and Gender

# Prosperity 10,000 I-Trac Data Entry Procedures

- v. Ethnicity
- vi. Race
- vii. Confirm Date of Birth
- viii. Social Security Number consent
- ix. Disability Characteristics

Use the drop down menu to select whether or not the participant has disclosed a disability. If they disclosed a disability, you have the option to select the disability type from the other drop down menu. Participants have the option not to disclose their disability status and/or type.

Disability Characteristics		
Disability Status		
save cancel	Person with a Disability	
Disability Type		
<input type="checkbox"/> Cognitive/Intellectual/Developmental		
<input type="checkbox"/> Hearing related disability		
<input type="checkbox"/> Mental or psychiatric disability		
<input type="checkbox"/> Physical/chronic health condition		
<input type="checkbox"/> Physical/mobility impairment		
<input type="checkbox"/> Vision related disability		
<input type="checkbox"/> I choose not to disclose		
Other Characteristics		
Other Characteristics		
Employment Status		
Status		Last Date
Annual Income		
Family/Household Size		Annual Income
		\$0.00

- x. Other Characteristics

This control helps to identify if the participant meets any of the priority populations intended to be served with these grant funds. Select any that apply, or select "None Apply."

Other Characteristics	
Other Characteristics	
<input type="checkbox"/> Homeless/Housing Insecure	<input type="checkbox"/> Oregon Tribal Member - Cow Creek Band of Umpqua Indians
<input type="checkbox"/> Incarceration (Current or Past)	<input type="checkbox"/> Oregon Tribal Member - Klamath Tribes
<input type="checkbox"/> LGBTQ+	<input type="checkbox"/> Receiving Refugee Cash Assistance
<input type="checkbox"/> Oregon Tribal Member - Burns Paiute of Harney County	<input type="checkbox"/> Receiving SNAP anytime in the last month
<input type="checkbox"/> Oregon Tribal Member - Confederated Tribes of Coos, Lower Umpqua, and Siuslaw Indians	<input type="checkbox"/> Receiving Supplemental Security Income
<input type="checkbox"/> Oregon Tribal Member - Confederated Tribes of Grand Ronde	<input type="checkbox"/> Receiving TANF
<input type="checkbox"/> Oregon Tribal Member - Confederated Tribes of Siletz	<input type="checkbox"/> Rural and Frontier Communities
<input type="checkbox"/> Oregon Tribal Member - Confederated Tribes of Umatilla Reservation	<input type="checkbox"/> Veteran (Not Dishonorable)
<input type="checkbox"/> Oregon Tribal Member - Confederated Tribes of Warm Springs	<input type="checkbox"/> None Apply
<input type="checkbox"/> Oregon Tribal Member - Coquille Indian Tribe	

# Prosperity 10,000 I-Trac Data Entry Procedures

---

- xi. Employment Status
  - 1. A selection of “Employed” or “Not Employed” will require entry of the participant’s last date worked.
- xii. Annual Income
  - 1. Enter the Household/Family size and the participant’s current annual income.
- xiii. Other Funding Source

Since participants may be funded for services with P10k funds located in multiple contracts across multiple service providers, use this control to track those various program services. Multiple program sources can be added to this control even after the Registration has been completed.

- 1. Click “add,” then select the name of the program which is funding services.
- 2. Optional – Use the Notes field to enter a quick description of the service provided by the program selected.

<a href="#">add</a> Other Funding Source			
	Date	Funding Source	Notes
<a href="#">edit</a> <a href="#">delete</a>	10/31/2022	SE Works-PDX Reentry	

<a href="#">add</a> Other Funding Source			
	Date	Funding Source	Notes
<a href="#">edit</a> <a href="#">delete</a>	10/31/2022	SE Works-PDX Reentry	
<a href="#">edit</a> <a href="#">delete</a>	10/31/2022	WSPM SE	Peer Support Training

- xiv. Registration Notes
  - Not required. Enter any notes as applicable.

## Prosperity 10,000 I-Trac Data Entry Procedures

---

- xv. Registration Completion
  - 1. Enter the date of the completion.
  - 2. Enter your name.
  - 3. Click Save.

Registration Completion		
	Application Date	Registered By
<a href="#">edit</a>	10/31/2022	Finnegan, Tim

## II. Signature Requirements

All P10k applications are required to be signed and uploaded in I-Trac.

### A. New Applications

- i. Option 1: Print the application from the Customer Documents menu and have the participant sign it. Scan the signed application and upload it using the Customer Documentation tool in I-Trac.
- ii. Option 2: Use the e-signature tool in I-Trac to send an electronic version of the application to the participant via their email on file. **This is the preferred method.**

### B. Paper Applications

For participants who signed the P10k paper application prior to the release of the I-Trac application, there is no need to collect another signature. Upload the signed copy of the paper application to the participant's I-Trac record using the Customer Documentation tool. If the participant supplied an email agreement to the paper application, upload a copy of their email agreement.

# Prosperity 10,000 I-Trac Data Entry Procedures

### III. Services Tab

Since participants receiving P10k services are all enrolled in other programs (such as WSPM, NextGen, EOP, etc.), services should be entered into the primary qualifying grant program and copied to the P10k record. This will avoid the need for duplicate data entry.

WorkSource Adult - LWA Portland Metro - WSPM B-H, Customer Of Kari Brenk, EID = 4538449

Planned Credential or Measurable Skills Gain				Last Modified By	Date Modified		
<b>add Training, Post-Secondary Education &amp; Employment Skills</b>							
<a href="#">edit</a> <a href="#">delete</a>	<b>Start Date</b>	<b>End Date</b>	<b>Target End Date</b>	<b>Service</b>	<b>Status</b>	<b>Location</b>	
	10/31/2022		12/16/2022	Occupational Skills Training	Started	WSPM SE	
	<b>Industry (NAICS)</b>		<b>Target Position (ONET)</b>		<b>Target Sector</b>	<b>Course of Study (CIP)</b>	
	Health Care and Social Assistance		Community and Social Service Specialists, All Other		Healthcare	44.99, Public Administration and Social Service Professions, Other.	
	<b>Training Provider</b>			<b>Course Name</b>		<b>Pell Recipient</b>	<b>WIOA ITA</b>
	MHAAO			Peer Support Specialist		No	No
	<b>Trade Act</b>	<b>Planned Credential or Measurable Skills Gain</b>					
	No	Industry Recognized Certificate or Certification, Measurable Skills Gain Leading to a Credential or Employment					
	<b>Copy To</b>	<b>Last Modified By</b>	<b>Date Modified</b>				
	• Prosperity_10K - SE Works	Finnegan, Tim	10/31/2022				

### IV. Payments Tab

Enter support service and training payments made with P10k funds directly into the P10k record. *Reminder: A payment alone is not a service and will not keep a record open.*

### V. Outcomes Tab

#### A. Program Status

- i. Manually exit the participants who have successfully completed the program (*see definition on next page*).
- ii. Ensure all data entry is complete and appropriate services copied prior to exiting the participant.

#### B. Credentials

- i. Add any earned Credentials as appropriate. Documentation is required to be uploaded to the participant's record in I-Trac.

#### C. Employment Information

- i. Enter all employment information, including wages and benefits. Data entry in I-Trac is a two-step process. Enter the first line of Employment Information and then click the add button to enter the second line of information. Hourly Pay; Hours/Week and Benefit information is required to be entered.

# Prosperity 10,000 I-Trac Data Entry Procedures

add Employment Information						
Start Date	End Date	Employment Type	Employer	Industry (NAICS)		
10/11/2022		Unsubsidized Employment	Worksystems Inc.	Administrative and Support and Waste Management and Remediation Services		
edit						
add	Date	Position (ONET)	Hourly Pay	Hours/Week	Benefits	
	10/11/2022	Administrative Services Managers	\$15.00	20.00	No Benefits	

## D. Employment Confirmation

- i. For the employment to be reported and used in performance tracking, the employment must be confirmed and documented in the Employment Confirmation control in I-Trac. State UI wage match confirmations will automatically show in the Confirmation control when received from the State if the participant is co-enrolled in WSPM or NextGen.
- ii. Enter an “After Participation” employment confirmation. Employment outcomes will only count for those who obtained employment after enrollment in P10k services.

add Employment Information						
Start Date	End Date	Employment Type	Employer	Industry (NAICS)		
11/1/2022		Unsubsidized Employment	Multnomah County - Health Department	Health Care and Social Assistance		
edit						
add	Date	Position (ONET)	Hourly Pay	Hours/Week	Benefits	
	11/1/2022	Healthcare Social Workers	\$18.50	40.00	Dental, Disability, Health, Life Insurance, Paid Leave, Retirement/Pension Plan	
add Employment Confirmation						
Date	Confirmation Type	Status	Confirmation Detail			
11/1/2022	After Participation Employment Confirmation	Working	Multnomah County - Health Department, Healthcare Social Workers, Started: 11/01/2022			
edit delete						
Confirmation Period	Staff	Related Training Services		Documentation		
10/31/2022	Tim Finnegan	Yes: Career Coaching (10/31/2022)		Customer Attestation		

A note about Performance:

“Program Completion” is defined as the participant’s successful completion of a training service or the participant obtains employment. Two of the performance measures in the contract are:

- 80% successfully complete the program
- 75% obtain employment

While it is true that a participant can be exited from the program following the completion of a training and before obtaining employment, please be careful not to exit participants too soon. To the extent possible, we want to keep participants active following training, until they become employed. If employment is seeming less likely as time goes on, then consider exiting the participant from the P10k program to capture the outcome for successfully completing a training.