Prosperity 10,000
I-Trac Data Entry Procedures

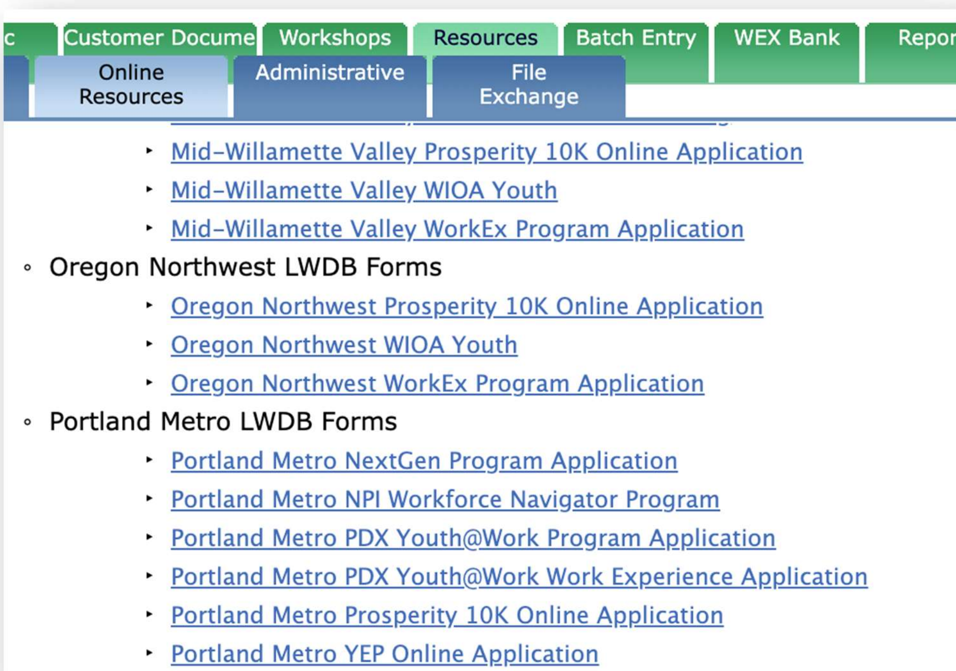
I. Registration

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

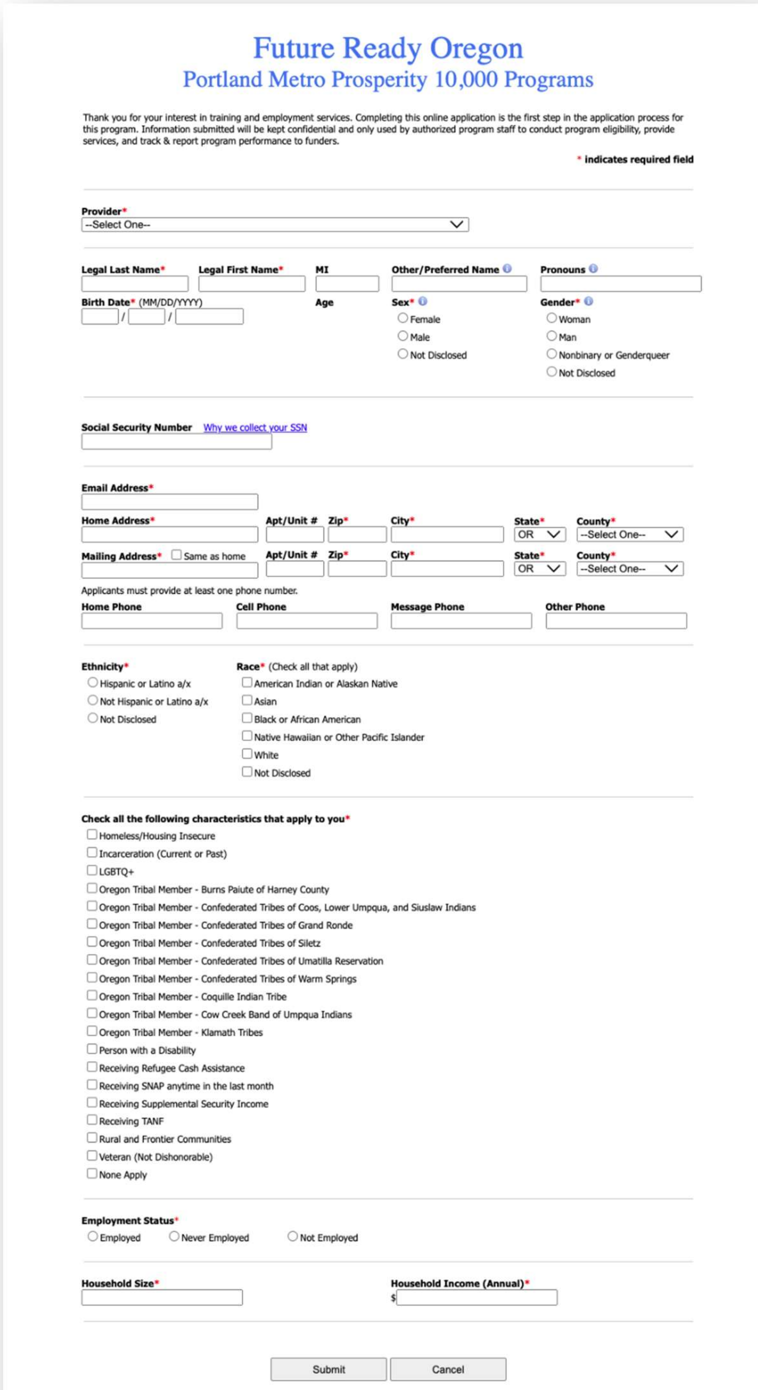
A. Use the P10k Online Application to create the new record and complete the remaining required data elements within the Registration Tab.
B. Add a new record directly from the Providers Tab and complete all data elements within the Registration Tab.

<u>Option 1: Prosperity 10K Online Application</u>

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.



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--

Legal Last Name* | **Legal First Name*** | **MI** | **Other/Preferred Name** | **Pronouns**

Birth Date* (MM/DD/YYYY) / /

Age

Sex*
- Female
- Male
- Not Disclosed

Gender*
- Woman
- Man
- Nonbinary or Genderqueer
- Not Disclosed

Social Security Number Why we collect your SSN

Email Address*

Home Address* | **Apt/Unit #** | **Zip*** | **City*** | **State*** OR | **County*** --Select One--

Mailing Address* Same as home | **Apt/Unit #** | **Zip*** | **City*** | **State*** OR | **County*** --Select One--

Applicants must provide at least one phone number.

Home Phone | **Cell Phone** | **Message Phone** | **Other Phone**

Ethnicity*
- Hispanic or Latino a/x
- Not Hispanic or Latino a/x
- Not Disclosed

Race* (Check all that apply)
- American Indian or Alaskan Native
- Asian
- 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 Paiute 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)*** $

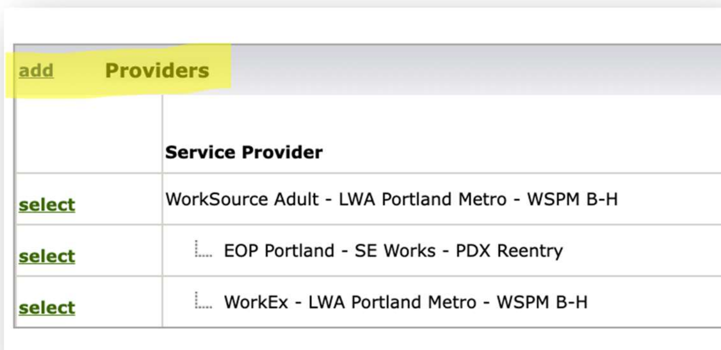
Submit | Cancel

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.

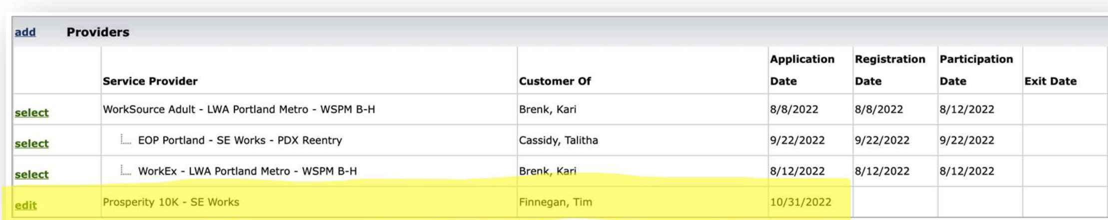
Option 2: Registration Tab

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."



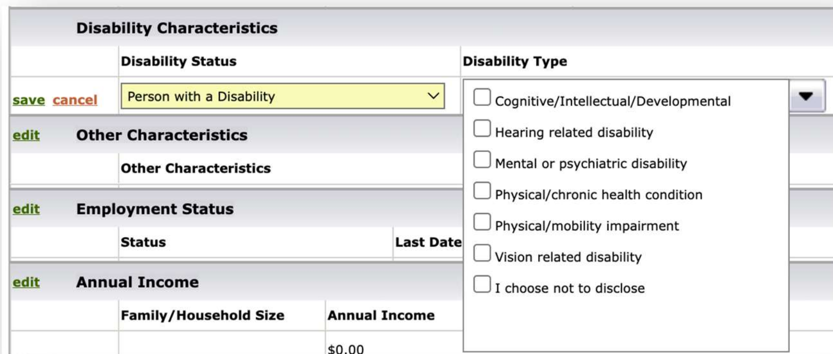
2) From the dropdown list of providers, select the P10k provider you are associated with. Enter your name in the "Customer Of" field and enter the Application Date. Click "Save" to finish creating the record.



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

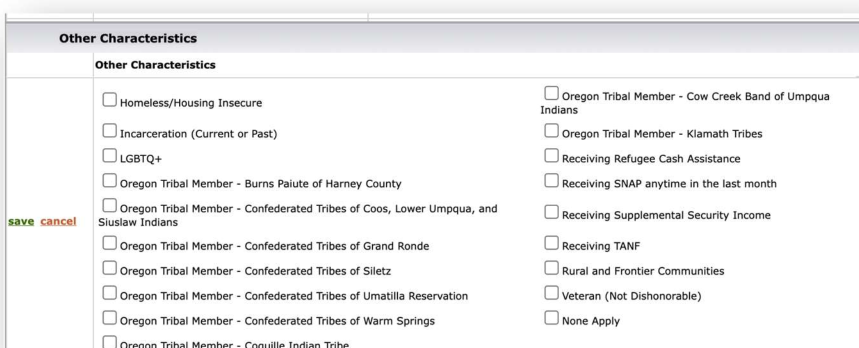
v. Ethnicity
vi. Race
vii. Confirm Date of Birth
viii. Social Security Number consent
ix. Disability Characteristics

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.



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."



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.

add **Other Funding Source**

	Date	Funding Source	Notes
edit delete	10/31/2022	SE Works-PDX Reentry	

add **Other Funding Source**

	Date	Funding Source	Notes
edit delete	10/31/2022	SE Works-PDX Reentry	
edit delete	10/31/2022	WSPM SE	Peer Support Training

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

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

Registration Completion

	Application Date	Registered By
edit	10/31/2022	Finnegan, Tim

II. Signature Requirements

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

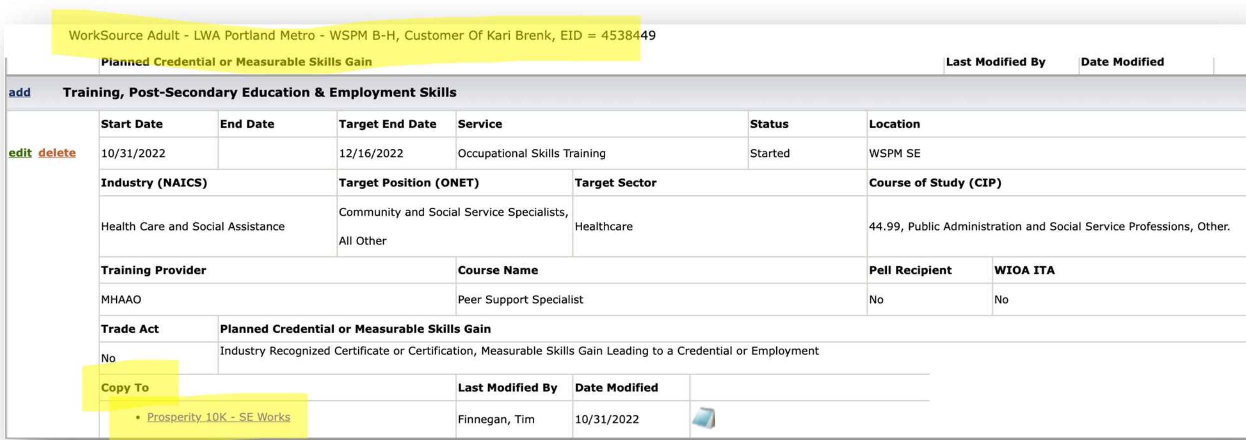
A. New Applications
  i. Option 1: Print the application from the Customer Documents menu and have the participant sign it. Scan the signed application and upload it using the Customer Documentation tool in I-Trac.
  ii. Option 2: Use the e-signature tool in I-Trac to send an electronic version of the 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.

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

add Training, Post-Secondary Education & Employment Skills

	Start Date	End Date	Target End Date	Service	Status	Location
edit delete	10/31/2022		12/16/2022	Occupational Skills Training	Started	WSPM SE

Industry (NAICS)	Target Position (ONET)	Target Sector	Course of Study (CIP)
Health Care and Social Assistance	Community and Social Service Specialists, All Other	Healthcare	44.99, Public Administration and Social Service Professions, Other.

Training Provider	Course Name	Pell Recipient	WIOA ITA
MHAAO	Peer Support Specialist	No	No

Trade Act	Planned Credential or Measurable Skills Gain
No	Industry Recognized Certificate or Certification, Measurable Skills Gain Leading to a Credential or Employment

Copy To	Last Modified By	Date Modified
• 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

There is no 90-day auto exit for P10k. Participant records will stay open until manually exited, or the grant end date, whichever comes first.

- i. When appropriate, manually exit the participants as either "Successful" or "Not Successful".
    1. A "Successful" exit is applied to participants who successfully complete at least one P10k program service (career coaching, training, Work Experience, etc.), *or* the participant obtains employment.
    2. A "Not Successful" exit is applied to enrolled participants who did not complete *any* service, nor have they secured employment.
- 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.

add	Employment Information				
	Start Date	End Date	Employment Type	Employer	Industry (NAICS)
edit	10/11/2022		Unsubsidized Employment	Worksystems Inc.	Administrative and Support and Waste Management and Remediation Services
	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)	
edit	11/1/2022		Unsubsidized Employment	Multnomah County - Health Department	Health Care and Social Assistance	
	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	
edit delete	11/1/2022	After Participation Employment Confirmation	Working	Multnomah County - Health Department, Healthcare Social Workers, Started: 11/01/2022	
	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 at least one P10k program service (career coaching, training, Work Experience, etc.), 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 we can reach the goal of 80% successful completion on just the number of services provided and completed, that could leave us falling well short of the employment goal. To the extent possible, we want to ensure that an employment outcome is captured as part of the "successful program completion" analysis and decision to exit the participant.