

TRAINING PROVIDER PORTAL USER GUIDE

INTraining Portal

Creating a User Account

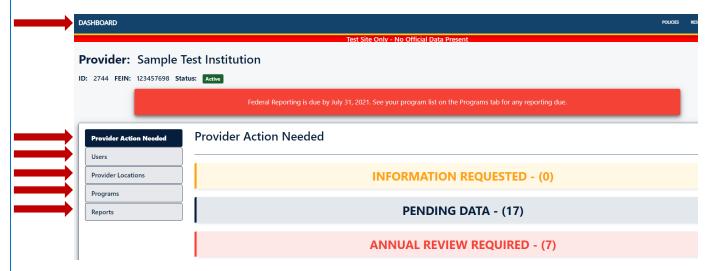
To access the INTraining Portal and Training Provider Dashboard, an email will need to be registered and a user account established. Please visit the INTraining Portal and click "Create a Training Provider User Account" at the top right corner of the screen. The INTraining account will link to Access Indiana. If an Access Indiana account does not already exist, one will need to be created. The same email should be used for each account. Any user listed as a training provider admin user within the INTraining portal may enable or disable other user accounts with the institution. Please also review the below section Establishing an Institution prior to creating a user account.

Registering an Institution

When creating a user account, a user will be required to provide the institution's **Federal Employer Identification Number (FEIN).** The FEIN is a unique nine-digit number assigned by the Internal Revenue Service (IRS) to business entities operating in the United States for the purposes of identification. If a *Provider Dashboard* already exists for the FEIN, the user account will automatically be connected to the *Dashboard*. If a *Provider Dashboard* does not yet exist, the system will automatically create one once the user account is accepted. All users <u>MUST</u> enter a valid FEIN.

Training Provider Dashboard

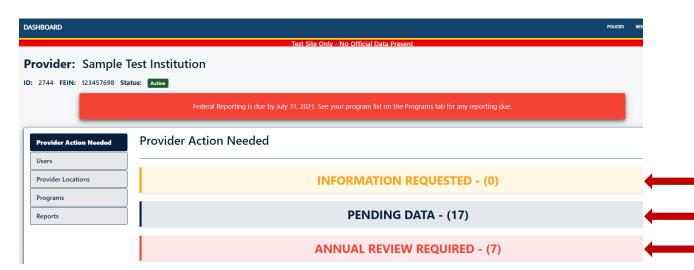
Once logged into the user account, the user will land on the *Training Provider Dashboard* and automatically be directed to the <u>Provider Action Needed</u> page. The *Dashboard* is the homepage of the Institution. <u>A user can always return to this homepage by selecting the *Dashboard* button in the top <u>left-hand corner.</u> From the Dashboard, users can navigate to the following pages: <u>Provider Action Needed</u>, Users, <u>Provider Locations</u>, <u>Programs</u>, and <u>Reports</u>.</u>



Provider Action Needed

This page will always display three categories: **Information Requested, Pending Data,** and **Annual Review Required.** If there is any information or action needed from the training provider, this task will

display under the appropriate category. In parenthesis, next to the category, the number of items requiring action will also be displayed. Users can click into the category to get more information. In the example below, there are 17 items that require action from the training provider in the *Pending Data* category, 7 items in the *Annual Review* category that require action from the training provider and 0 items that require action in the *Information Requested* category. To view more information about the application or what is needed, the user can select the category with pending items. The selected category will expand and display all the applications that require additional information. The user will need to select "*View Details*" on a specific application and then navigate to *Status History* or *Comments*. Training providers should check this page monthly, at a minimum, to ensure there is no pending action items to resolve.



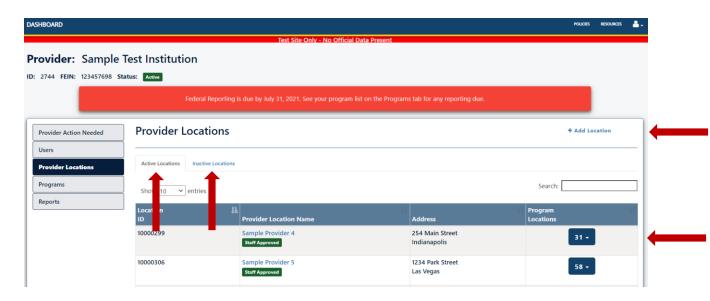
Users

This page will display all users for the institution, their status, and portal administrative level. There are two administrative user levels or roles: *training provider admin* and *training provider*. A *training provider* is a read-only role and only has access to the dashboard but is not able to edit or submit information. A *training provider admin* role has full access. This role can submit applications, edit, and add or disable other users. **Training providers should ensure there is always at least one active user.**

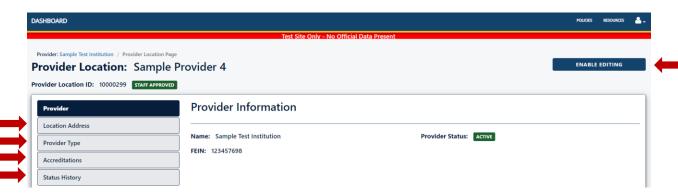


Provider Locations

This page displays all the provider location or training location applications an institution has submitted. Both *active* and *inactive* applications are located on the respective tabs. Training providers may start and submit new training location applications from this page by selecting "+Add Location". Submitted applications may be edited by selecting the *Provider Location Name*. The far-right column labeled "*Program Locations*" indicates how many training programs are offered at that location.



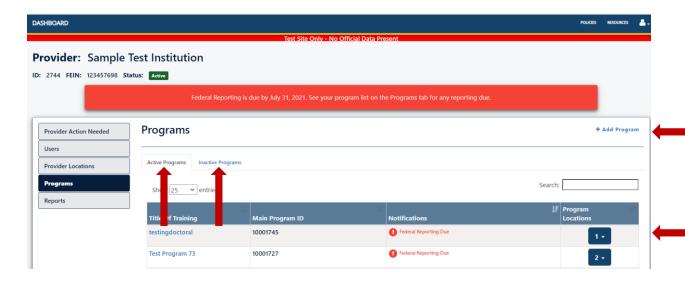
When selecting a *Provider Location*, the user will be redirected to the application page for that location. From here, the user can review the application information which is now disbursed through the pages on the left-hand side. The user can edit this information by selecting *"Enable Editing"*.



Programs

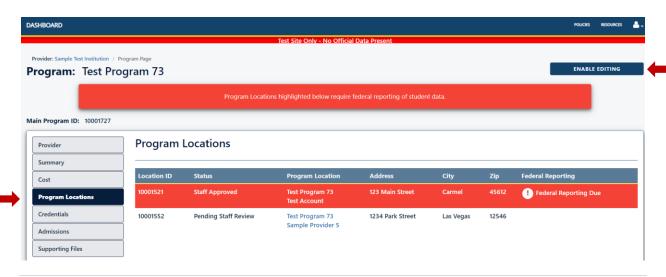
This page displays all the program applications an institution has submitted. Both *active* and *inactive* applications are located on the respective tabs. Training providers may start and

submit new program applications from this page by selecting "+Add Program". Submitted applications may be edited by selecting the *Title of Training*. The far-right column labeled "Program Locations" indicates how many training locations offer the program.



When selecting the *Title of Training*, the user will be redirected to the application page for that training program. This is referred to as the *main program*, which is a unique course, class, or regimen that provides training services. A *main program* may be offered at multiple provider locations. The user can review the application information which is now disbursed through the pages on the left-hand side. The user can edit this information by selecting *"Enable Editing"*.

The **Program Locations** page will display all the provider locations the training provider has indicated offers the main program. Each main program will receive a unique code for each provider location at which it is offered and will be referenced as the program location. Provider (training) location + main program = program location.



Reports

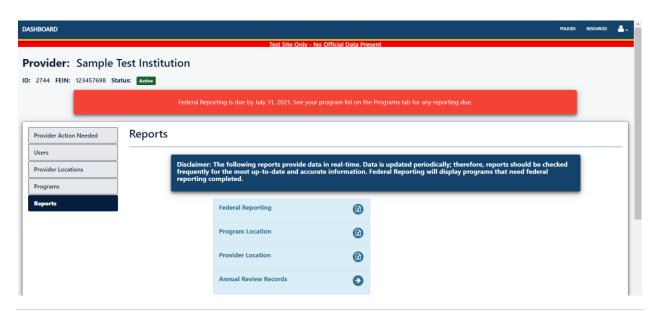
This page provides available reports to the training provider. The reports provide data in real-time. Data is updated periodically; therefore, reports should be checked frequently for the most up-to-date and accurate information. The four reports available are: *Federal Reporting*, *Program Location, Provider Location*, and *Annual Review Records*.

Federal Reporting: This report is only available during the month of July. At the time the Excel export is pulled, an inclusive list of all PROGRAM LOCATIONS that require federal performance reporting will be provided. The Federal Reporting export provides real-time information. When federal performance reporting is successfully completed on a program location, that program location will no longer appear on the export. Training providers will need to pull this export frequently during July to view an accurate list of program locations that still require reporting

Program Location: At the time the Excel export is pulled, an inclusive list of all program locations will be provided. This export will include both active and inactive program locations.

Provider Location: At the time the Excel export is pulled, an inclusive list of all provider locations will be provided. This export will include both active and inactive provider locations.

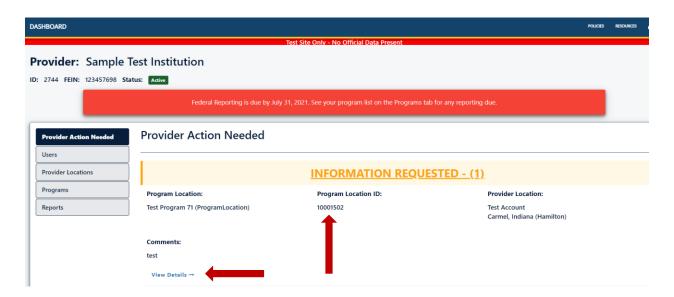
Annual Revew Record: When selecting the Annual Review Records report, the user will be redirected to a new page. The Annual Review Records page will display two separate reports: *Program Locations* and *Provider Locations*. The user must select each report to view an inclusive list of all applications that are pending annual review. Each report will display the respective applications that are within 60 days of their annual review due date or within 60 days after their annual review due date if the annual review has not yet been completed.



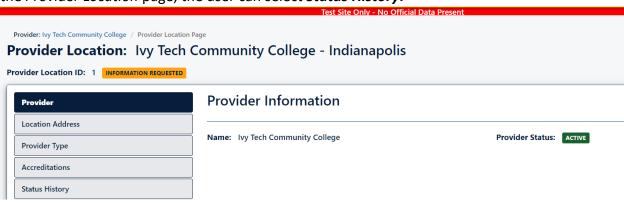
Submitting Requested Information

INTraining staff may request information from the training provider. This information will be requested through the INTraining Portal. The system will generate an email to all active users. After 60 days of no response to the request for information, the application will be denied.

To review the information that is being requested, users will want to navigate to the *Provider Action Needed* page and select the *Information Requested* category. The selected category will expand and display all the applications that require additional information. The user will need to select "*View Details*".

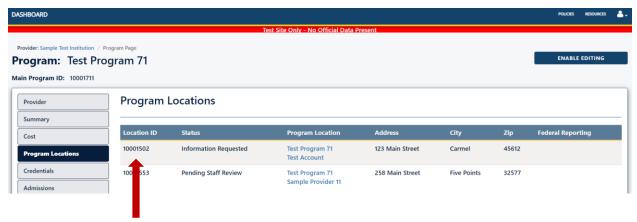


The user will be redirected to the *Provider Location* or *Program Locations* page. If directed to the *Provider Location* page, the user can select *Status History*.

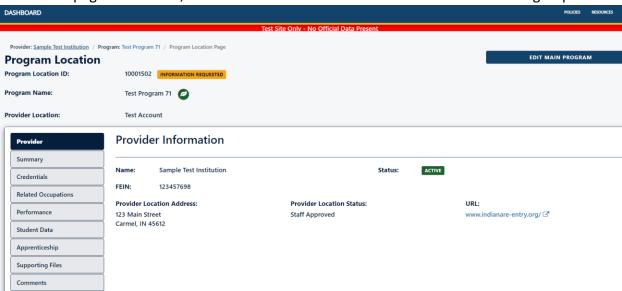


-OR-

If directed to the *Program Locations* page, the user will need to select on the *Program Location ID* that is requesting information.



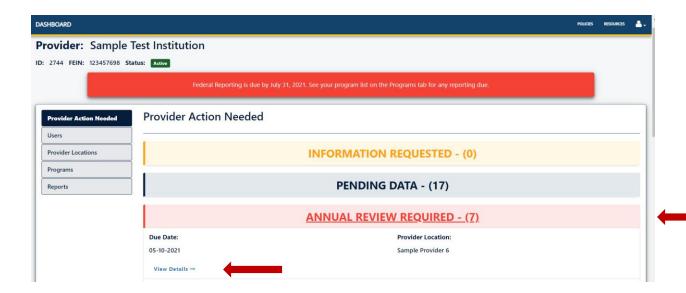
This will take the user to the **Program Location** page. The user will need to navigate to the **Comments** page. From here, the user will be able to view what information is being requested.



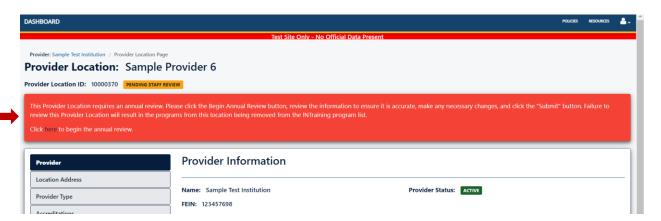
Completing Annual Review

Training providers are required to review all approved applications on an annual basis to ensure all listed information is true and accurate. The annual review due date is based upon the provider location or program's initial approval date; therefore, training providers may have to complete an annual review multiple times throughout the year. Notification will be sent to all active users 60 days prior to the annual review due date for a particular application to all active users. If the annual review is not completed by the due date, the application will be placed into *Information Requested* status.

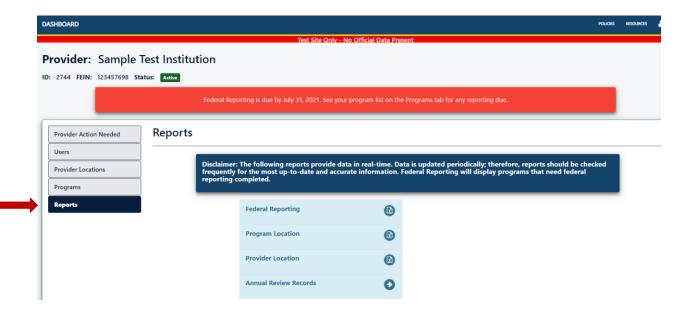
To complete this task, users will want to navigate to the *Provider Action Needed* page and select the *Annual Review Required* category. The selected category will collapse and display all the applications that are currently up for annual review. The user will need to select "*View Details*".



The user will be redirected to that application page and the page will display a message for the training provider to begin the annual review.



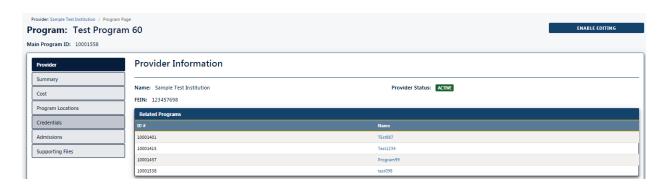
Training providers may also navigate to the *Reports* page and review the *Annual Review Records* report to view a list of applications pending annual review.



Submitting Student Data

The Indiana Department of Workforce Development's INTraining Policy requires all training providers to report student-level data to DWD via the INTraining portal throughout the program year. The INTraining Procedural Guidance highlights the data elements that training providers are required to collect and report. Data MUST be reported for ALL students participating in the program, regardless of the funding source. Data is reported at the program (training) location level. Student-level data should be reported at the beginning and end of each cohort and MUST be reported and submitted during the federal reporting timeframe.

At the provider's Dashboard, select the program whose data needs to be reported. This will bring the user to the **Main Program ID** page:



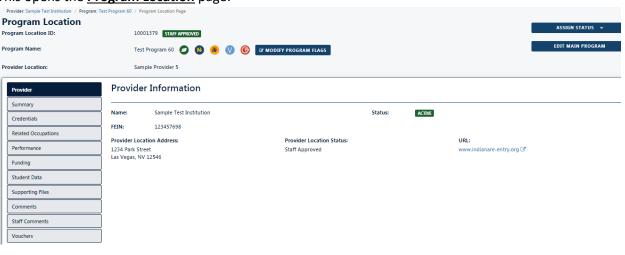
Click on the Program Locations page:



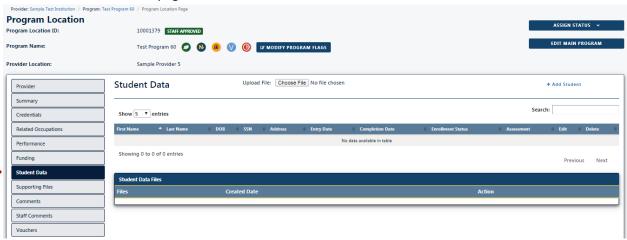
Click on the name of the program under the Program Location:



This opens the **Program Location** page:



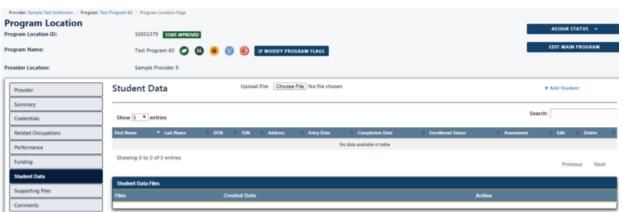
Click on the Student Data page:



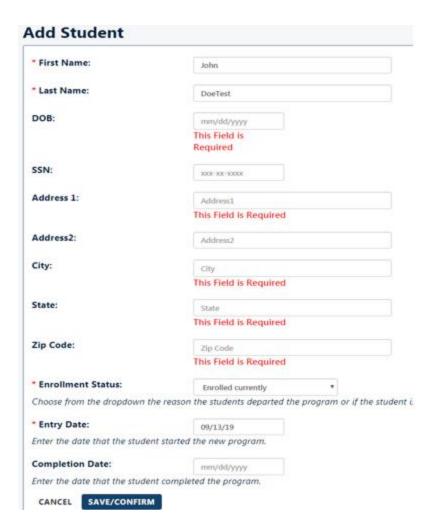
At this point, the user has the option to upload a .csv file for multiple students (10 or more) or to add a student one at a time. Student data should ONLY be loaded to the program location the student attended. The below steps must be completed for each program location.

Adding individual students

Click on the Add Student link:



The Add Student page will appear. Complete all of the data required and click Save/Confirm. If a field is missed, the user will receive the "This Field is Required" message under the field that is missing required information.



Once the fields are all populated, click the Save/Confirm. The first student is submitted. Repeat this for all students.

Adding multiple students

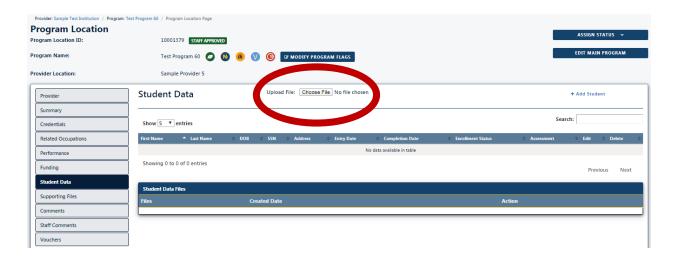
To submit students of 10 or more, the user will need to complete the student data on the Student Data Template in Excel. The template can be found at: www.intrainingdwd.org. Click on the Training Providers link and then the Resources link.

An Excel spread sheet will download/open. Complete the fields.

Once the spreadsheet is complete, save with a file name you will remember. Make sure you do not change the file format and that it is saved in the .csv format (CSV – comma delimited). Example:

Welding cohort 08-13-19.csv

After the file is saved, the user can upload the file using the Upload File Choose File button:



This opens a window for the user to find the .csv file. Select the file and click Open. It will take 24 hours for the file to show it's been uploaded. This can be verified by viewing the Student Data page in the Files section.

