



Bright Horizons EdAssist Solutions (BHES) ITA Application Procedure

Overview

Once the customer has the service submitted in Career Connect, the next step is to submit the ITA Application in the Training Assessment and Review Agency (TARA) system also known as Bright Horizons EdAssist Solutions (BHES). The ITA Application will be submitted by the Career Coach and must include the following information:

- Education Program
- Field of Study
- Education/Training Provider
- Program Dates
- Course/Program Name
- Total ITA Obligation Amount
- Financial Statement Form

The Career Coach will be required to attach a **pdf** of the Financial Statement to the ITA Application in the BHES. Bright Horizons will review all applications and confirm that the documentation and the application are aligned before approving the application. Once approved, Bright Horizons will issue a Letter of Credit (Voucher) for the customer which will be emailed to the Career Coach and given to the customer to sign and bring to the training provider.

Navigation

To access BHES website, go to: <https://partnership.edassist.com>

Requirements

Prior to entering the ITA application in BHES, the Career Coach should verify that the Initial ITA Request Service has been entered and completed correctly in the Career Connect system to allow for the customer's information to automatically be created in the BHES system. In order for your customer's file to appear the next business day in the BHES system, all of the following conditions must be met:

- The service must be entered in Career Connect by 7 pm central time for it to show in the BHES system the next business day.
- The Service must be opened and closed as a same day service.
- A Career Coach must be assigned.
- Test scores must be entered.

Procedures

1. Go to <https://partnership.edassist.com> to login. Please use your Career Connect username.
If it is your first time logging into the system, click “First time here?” and follow the on-screen instructions to reset your password. Select the “Remember Me” checkbox to save your username for the next time you return to the website.

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If this is your first time logging in to the system, click “First time here?” (below) to get started.

Career Connect Username

Password

Remember Me

LOG IN

First time here? [Forgot Password?](#)

2. Upon login, you will be brought to the Home page which includes helpful information and important messages about the TARA program. To expand the messages section, click the + button. To review the **procedure documentation**, or access the **Financial Statement** form, click on the document name under “Using Your Benefits”.

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NEW APPLICATION Home Application History Support

+ Messages 0 New

Start Impersonation

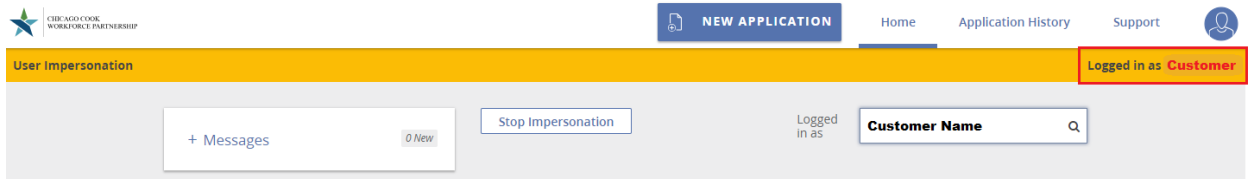
Logged in as Customer Name Search

Using Your Benefits

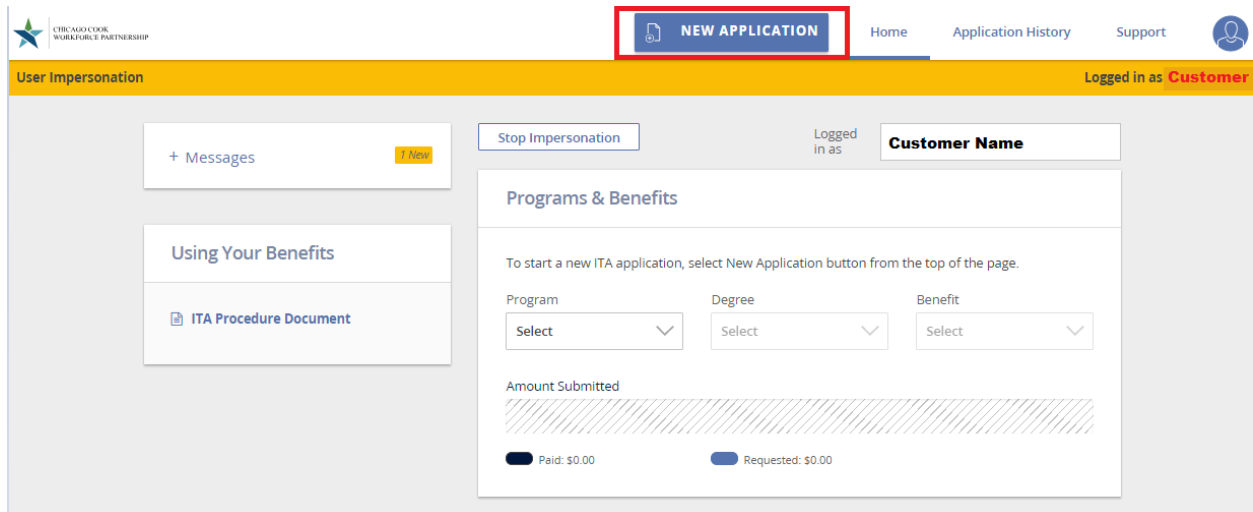
ITA Procedure Document

In the BHES, all of a Career Coaches’ ITA Applications will be available under the Career Coaches’ login. If you are ready to add an ITA Application for a customer- click the “Start Impersonation” button. In the search box, type the name of the customer you want to add an application for. You will now be logged in as your customer.

When an Impersonation is Active, there will be a yellow bar on the screen.



3. You will be brought to the Home page of the customer and will see the New Application button in the top navigation bar. Select the New Application button to start the application process.




Step 1: Your screen will show the customer’s contact information which comes over from Career Connect. Select continue to move to Step 2. NOTE: The customer’s email address will be blank. All emails will be sent to the Career Coach’s email. ***Please note this is a change from the previous notification method of a group mailbox.***

1 Contact Information 2 Programs 3 Expenses 4 Agreements 5 Review & Submit

New Application


Contact Information

 **Your Address**

Use Work Address Use Home Address


Garfield Workforce Center 2909 W. Warren Blvd.
Chicago, IL Chicago, IL 60612

To change an address please contact your employer.

 **Your Phone Number**

Use Work Phone Use Home Phone

(773) 722-3885 (773) 241-4509

 **Your Email Address**

Use Work Email Use Home Email

Step 2: The program will auto populate some fields based on the information coming over from Career Connect.

To begin the Application:

- Select the Education Program (e.g. Certification, Associate’s Degree, etc.).
- Select the Field of Study.
- To add the Training Provider click the “Add Education Provider” button.
- Type the training provider name in the name box.
- Click “Search”.

2 Programs

New Application

Programs

Your Program

TARA - Dislocated Worker Program

What will be your degree?
Select both fields below to identify education objectives.

Education Program: Select | Field of Study: Select

Who is your Education Provider?

ADD EDUCATION PROVIDER

CONTINUE | Cancel

Search Providers

Use any of the search fields below to find your Provider. Additional criteria will impact your search results.

Name: Career Colleges

City: | State: Select | Accreditation: Select

Network schools offered by your employer that provide tuition discounts and/or other benefits.

SEARCH | Cancel

Name	Address	Network School (Discounts & Other Benefits)
Career Colleges of Chicago	11 E Adams, Ste 201, Chicago, IL	No
Concorde Career Colleges Inc	Business Office, 4202 W Spruce St, Tampa, FL	No

Show More Results

Step 3: Fill in the following based on the customer's specific information. All fields are required even if information is unknown.

- Enter the program start and end date in the session start and end date fields.
- Select the **Add A Course & Related Expense** button
 - Enter Program Name from ITA as Course Name
 - Enter "Unknown" as Course Number
 - Enter the total ITA Obligation Amount as Amount
 - Enter # of Credit Hours earned or "0" if unknown
 - Select Instruction Type from drop-down list
 - Click Add Course button when finished

The screenshot shows a web application interface for a 'New Application'. The navigation bar at the top has five steps: 1. Contact Information, 2. Programs, 3. Expenses (highlighted with a red box), 4. Agreements, and 5. Review & Submit. Below the navigation bar is a yellow header. The main content area is titled 'New Application' and contains a section for 'Expenses'. Under 'Expenses', there are two sections: 'Session Information' and 'Course & Expense Information'. The 'Session Information' section has two date pickers: 'Session Start Date' with the value '12/03/2018' and 'Session End Date' with the value '01/31/2019'. Both date pickers are enclosed in a red rectangular box. The 'Course & Expense Information' section has a red-bordered button labeled 'ADD A COURSE & RELATED EXPENSE'. At the bottom of the form are two buttons: 'CONTINUE' and 'Cancel'.

Add a Course & Related Expense ✕

Enter Program Name from ITA as Course Name
 Enter "Unknown" as Course Number
 Enter the total ITA Obligation Amount as Amount
 Enter # of Credit Hours earned or "0" if Unknown
 Select Instruction Type from drop-down list
 Click Add Course button when finished

Course Name:

Course Number:

Amount:

Credit Hours:

Instruction Type:


ADD COURSE

Step 4: If the customer is receiving any grants, scholarships, or other resources that offset training costs, select "Yes" and enter the applicable source(s) and amounts.

Contact Information
 Programs
 Expenses
 4 Agreements
 5 Review & Submit

New Application

Agreements



Did you receive any grants, scholarships, or discounts?
 Yes No

Scholarship/Grant Type:
 Amount:

Continue on Step 4: The Career Coach is attesting to the Participation Agreement by clicking “I agree”. The Career Coach will then sign the application on behalf of the customer, *using the customer’s name*. Click continue at the bottom of the page when complete.

Progress bar: 1 Contact Information, 2 Programs, 3 Expenses, 4 Agreements, 5 Review & Submit

Scholarship/Grant Type: Pell Grant | Amount: \$ 500.00

Agreements

Participation Agreement
I attest that the information provided on the ITA application(s) in Bright Horizons EdAssist Solutions, the Career Connect System, and the Financial Statement form is true and accurate. I understand that it is my responsibility to ensure the WIA customer has applied for federal financial aid, when applicable, and to obtain my WIOA customer’s official financial aid information from his/her selected training provider.
I attest that the customer visited at least two (2) WIOA certified training facilities prior to applying for an ITA. I attest that the following documentation is in the customers file on site at my WIOA agency location.

I agree

By providing my electronic signature, I acknowledge that the preceding information is accurate and complete to the best of my knowledge.

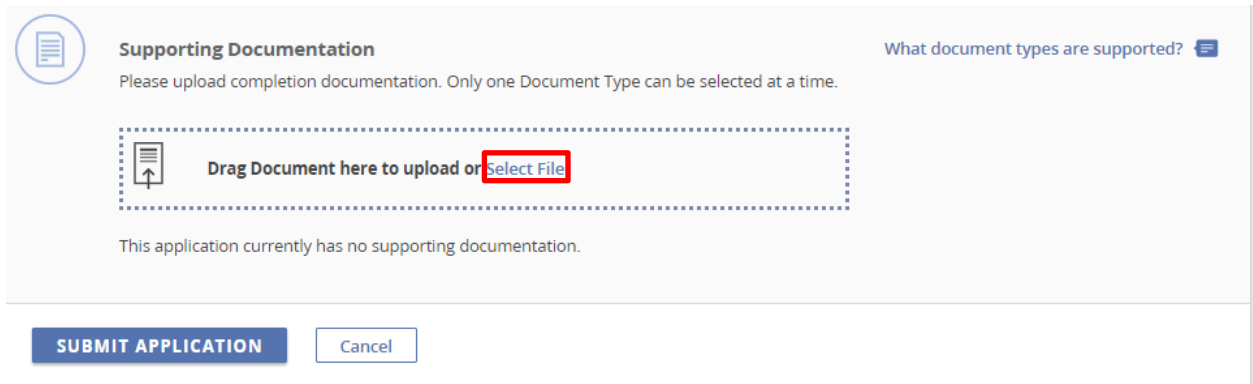
Your Name:
Customer Name

Enter your name exactly as it appears above.
Customer Name

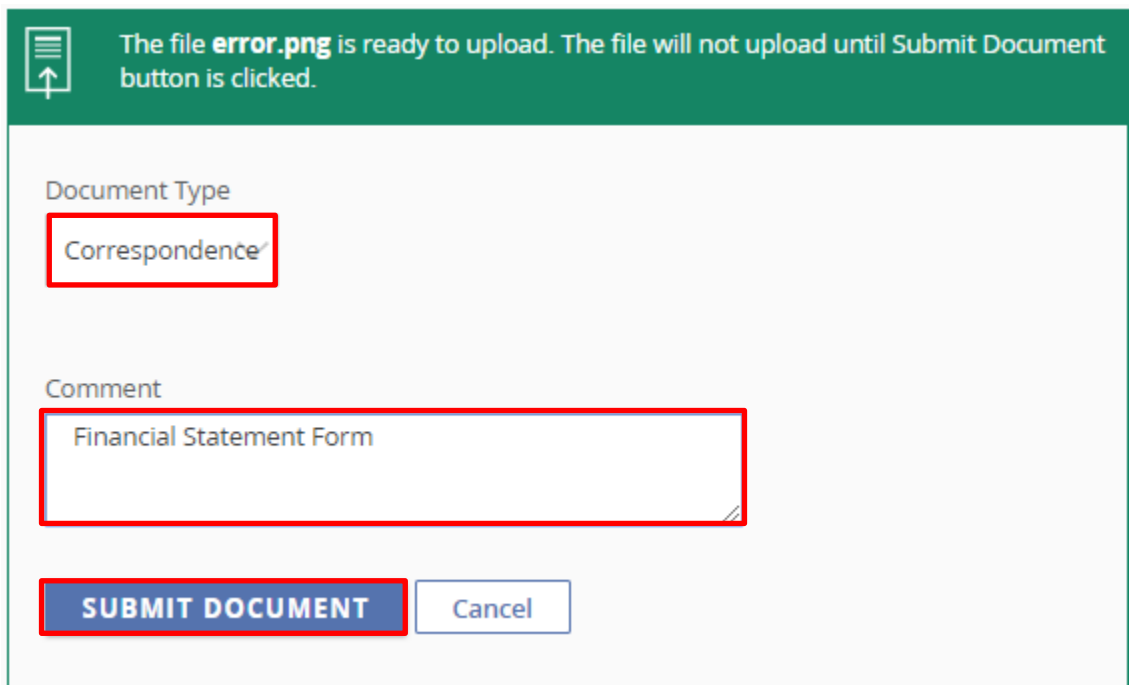
Buttons: CONTINUE, Cancel

Step 5: Review all the information entered and confirm it is accurate. Attach a pdf copy of the Financial Statement form in the Supporting Documentation section by selecting “Select File” button. Select correspondence as the document type and add a comment if needed, then click on “Submit Document”. Anytime a document is uploaded to an Application, you will receive an email notification confirming that Bright Horizons received the document.

Note: The Application Number is no longer a required field on the Financial Statement Form. Other portions of the Financial Statement have also been revised.



The screenshot shows the 'Supporting Documentation' section of an application form. At the top left is a document icon. The title 'Supporting Documentation' is followed by the instruction: 'Please upload completion documentation. Only one Document Type can be selected at a time.' To the right is a link: 'What document types are supported?'. Below this is a dashed box containing an upload icon and the text 'Drag Document here to upload or **Select File**'. Underneath the dashed box, it says 'This application currently has no supporting documentation.' At the bottom of the section are two buttons: 'SUBMIT APPLICATION' and 'Cancel'.



The screenshot shows a green confirmation dialog box. The header text reads: 'The file **error.png** is ready to upload. The file will not upload until Submit Document button is clicked.' Below the header, there are two input fields: 'Document Type' with the value 'Correspondence' and 'Comment' with the value 'Financial Statement Form'. At the bottom of the dialog are two buttons: 'SUBMIT DOCUMENT' and 'Cancel'.

Step 6: Click “Submit Application” to submit the application package for review.

Supporting Documentation What document types are supported?

Please upload completion documentation. Only one Document Type can be selected at a time.

Drag Document here to upload or Select File

	DOCUMENT	Correspondence	Uploaded 11/27/18	Status Pending	Date Reviewed 11/27/18
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SUBMIT APPLICATION

- Your application will be set to *Submitted- Pending Review* for Bright Horizons to approve. You will receive an on-screen confirmation which looks like the one below. Select Return to Home page and select Stop Impersonation to log out as this customer.

Tuition application # 5316625 was submitted.

Your application has been submitted - pending review

Bright Horizons is reviewing the application for eligibility.
Application requires manual review to set cap limit.
A cap limit has not been found for this application. Manual entry of cap limit is required prior to approval.

[Return to Home Page](#)

NEW APPLICATION Home Application History Support

User Impersonation Logged in as

+ Messages 1 New [Stop Impersonation](#)

Programs & Benefits

Result

Bright Horizons will review the application submitted to confirm all information is accurate and correct. Once approved by Bright Horizons, an email notification will be sent to you which will include the Letter of Credit (Voucher). Please provide your contact information on the Letter Of Credit (Voucher) and then you can give the voucher to the client for their signature which includes instructions on bringing to the provider prior to beginning training.

Letter of Credit (Voucher) Instructions

The Letter of Credit (Voucher) will be attached to the Approval email notification. Additionally, you can login and impersonate the customer and access their Application History page. Select the Application Number to open the full Application Summary view and access the Letter of Credit.

The screenshot shows the 'Application History' page. At the top, there is a navigation bar with 'NEW APPLICATION', 'Home', 'Application History', and 'Support'. Below this is a yellow bar with 'User Impersonation' and 'Logged in as Ashley Johnson'. The main content area is titled 'Application History' and includes filters for 'Team Member' (You (Ashley Johnson)), 'Benefit Period' (All), and 'Sort By' (Application Number). A table displays one application entry for Ashley Johnson, TARA - Adult Program, with application number #5319181, issued for \$100.00.

Team Member	Benefit Period	Sort By	Applications
You (Ashley Johnson)	All	Application Number	3 Applications

Application Status	Applicant Name	Program	Application Number	Benefit Period	Total
LETTER OF CREDIT (LOC) ISSUED	Ashley Johnson	TARA - Adult Program	#5319181	Dec 3, 2018 - Dec 17, 2018	\$100.00

LETTER OF CREDIT (LOC) ISSUED Employee **Ashley Johnson**

Supporting Documentation What document types are supported?

Please upload completion documentation. Only one Document Type can be selected at a time.

Drag Document here to upload or Select File

This application currently has no supporting documentation.

Status History

	MESSAGE	From Salamanca, Audra Tset	Dec 03, 2018 05:14 PM
	LETTER OF CREDIT (LOC) ISSUED	Status Change	Dec 03, 2018 05:14 PM

[View All Status History](#)

Comments

[Add New Comment](#)

No Comments

Editing Applications after Submission

If an application is marked as *Submitted- Incomplete*, you will receive an email notification with the additional information being requested or a correction needing to be made. If it requires an edit to the application, login and impersonate the customer. On the customer Home page you will see the **Action Needed** list which will include *Submitted -Incomplete* applications. To update the application select the **Complete Application** button.

NEW APPLICATION Home Application History Support

Logged in as Ashley Smith

[+ Messages](#)

Using Your Benefits

[ITA Procedure Document](#)

[Stop Impersonation](#) Logged in as Ashley Smith

Programs & Benefits

To start a new ITA application, select New Application button from the top of the page.

Program: Degree: Benefit:

Amount Submitted

Paid: \$0.00 Requested: \$0.00

Action Needed

	SUBMITTED-INCOMPLETE	Smith, Ashley TARA - Adult Program Dec 7, 2018 - Dec 21, 2018 Submitted: Nov 29, 2018	#5317920
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[Complete Application](#)

Select the **Edit** button from the top right corner of the application summary. You may also **add comments** to EdAssist in the comments section if there are questions on the incomplete information.

Tuition Application #5317920 Edit Application Cancel Application

SUBMITTED - INCOMPLETE Employee **Ashley Smith**

Supporting Documentation What document types are supported?

Please upload completion documentation. Only one Document Type can be selected at a time.

Drag Document here to upload or Select File

This application currently has no supporting documentation.

Status History

PROGRAM RULE	From Program Rules The application total of \$1,000.00 exceeds the lifetime cap limit of \$1,000.00 by an amount of \$100.00 . This application amount may be adjusted and resubmitted for review.	Nov 29, 2018 12:23 PM
SUBMITTED - INCOMPLETE	Status Change	Nov 29, 2018 12:23 PM

[View All Status History](#)

Comments

[Add New Comment](#)

From: **Ashley Smith** Dec 04, 2018

testing comment

Denied Applications and Resubmitting

If an application is marked as *Denied*, you will receive an email notification with the reason for denial. It may require that you submit another application. If you are required to resubmit, login and impersonate the customer and follow the same new application process. You will also be able to view the denied application within the customer's application history page and opening by selecting the application number.

The screenshot shows the 'Application History' interface. At the top, there are filters for 'Team Member' (You (Ashley Johnson)), 'Benefit Period' (All), and '3 Applications'. A 'Sort By' dropdown is set to 'Application Number'. The main content area displays a single application card for 'Ashley Johnson' with application number '#5319181' highlighted in a red box. The application is marked as 'DENIED'. The card includes the following details: 'TARA - Adult Program', 'City Colleges of Chicago Malcolm X College', 'Certification/Designation - Nurse/Nursing Assistant/Aide And Patient (511614)', and the period 'Dec 3, 2018 - Dec 17, 2018'. A 'View More' button is located at the bottom left of the card, and the total amount is listed as '\$100.00' at the bottom right.

In the Status history the denial reason will be listed. You may also **add comments** to EdAssist in the comments section if there are questions on the denial.

The screenshot shows the 'Tuition Application #5319181' page. The application is marked as 'DENIED' and is for 'Employee Ashley Johnson'. The 'Supporting Documentation' section prompts the user to upload completion documentation. The 'Status History' section, highlighted with a red box, shows a message from 'Salamanca, Audra' dated 'Dec 03, 2018 05:42 PM' with the subject 'testing denial', and a subsequent 'DENIED' status change on the same date and time. Below this is a 'View All Status History' button. The 'Comments' section at the bottom has an 'Add New Comment' button highlighted with a red box and currently shows 'No Comments'.

Cancelling an Application

You may not cancel a voucher if the client has started training as there will be some funds due to the training provider based on the school's refund policy. **Prior to** canceling an ITA Application in the BHES, you must check with the school to confirm that no billing is going to be submitted.

Once you have confirmed with the school that they are not going to bill, you can cancel an application by impersonating your customer and accessing their Application History. It is important to confirm prior to cancelling the application in the BHES system, that the customer has a zero dollar balance with the training provider. If yes, select the application number in question and select the Cancel Application button in the top right.

How to Review my Customer's Applications

When you are logged in to your profile as the Case Manager, you will see the Application History in the top navigation bar. Once on the page, you will want to select from the drop-down "Your Team" which will show you all of your customers' applications. You will be able to view each full application by selecting the application number to open the full summary.

The default sort will be by application number. You can change the sort to Date Submitted, Application Status or Education Provider. Also, you can filter by Benefit Period (Program Year) to streamline your search.

Note: You can access each customer's personal application history by impersonating the customer.

Application Status	Applicant Name	Program	Dates	Total
SAVED - NOT SUBMITTED	Ashley Johnson	TARA - Adult Program City Colleges of Chicago Malcolm X College Certification/Designation - Nurse/Nursing Assistant/Aide And Patient (S11614)	Dec 11, 2018 - Dec 18, 2018	\$11.00
SAVED - NOT SUBMITTED	Ashley Smith	TARA - Adult Program City Colleges of Chicago Malcolm X College Bachelor's Degree - Administrative Assistant And Secretarial (520401)	Dec 3, 2018 - Jan 31, 2019	\$47,000.00
DENIED	Ashley Johnson	TARA - Adult Program City Colleges of Chicago Malcolm X College Certification/Designation - Nurse/Nursing Assistant/Aide And Patient (S11614)	Dec 3, 2018 - Dec 17, 2018	\$100.00

Financial Statement

Today's Date 12/16/2018 Is this a revised/updated form?

Participant and Training Information

WIOA Customer Name (first and last)	Mark Williams
Customer's Career Connect State ID #	12349876
<hr/>	
WIOA Service Provider/Agency	National Able Network
Career Coach Name	Missy Advice
WIOA Certified Training Provider	Star Truck Driving
WIOA Certified Training Program Name	CDL Truck Driving 240
Registration Date <i>(List the date customer needs to submit voucher to the WIOA certified training provider)</i>	01/02/2019

Financial Aid and other Subsidies

A. Total Program Cost (including books, expenses, and tests) The amount listed here must match the total listed in Illinois workNet	\$5,000
Type of Funds to be Used toward Training	Amount (\$ listed here will be applied to program)
B. State funds Awarded applied toward tuition	\$500
C. Federal funds Awarded (Pell)	\$500
D. Customer or School Contribution	\$250
E. Customer Private Student Loans	\$0
F. Total Subsidies/Previous Payments (B+C+D+E)	= \$1,250
G. ITA Funding Request (A-F)	= \$3,750

3rd Party Vendors

The section below must be completed if an additional voucher(s) is needed for a 3rd party vendor (Party other than the training provider listed above)

Expense	Vendor Name	Amount
Books		+
Uniforms		+
Expenses (Supplies)		+
Tests		+
Other		+
H. Total Voucher Amount to 3rd party vendor(s)		=
I. Voucher Amount to Training Provider after deductions of 3rd party vendors (Subtract H from G)		=

ITA Application Signature Section

I attest that the information provided in Career Connect, on this Financial Statement and entered the Bright Horizons EdAssist Systems (BHES) is true and accurate. I understand that unless there is an exception there is an \$8,000 lifetime cap on the Individual Training Account tuition funding that I am eligible to receive under the Workforce Innovation and Opportunity Act. I also understand that the ITA is available to me only one time unless there is an exception.

I understand that this Voucher for Training for tuition and course related fees can be used only as specified and approved as a part of my Voucher for Training. I understand that I am responsible for all charges for which I am not eligible and which have not been approved in my Voucher for Training. I understand that the eligible institution above may give course and financial information pertaining to my enrollment to BHES and my Career Coach.

I understand that my ITA voucher will not cover the cost of any training activities that I may participate in prior to the approval of my ITA voucher. It has been explained to me that starting this program prior to approval of the ITA voucher may result in the cancellation of my application and I may be responsible for all costs incurred for training services provided during such time. My Career Coach may sign on my behalf as previously authorized.

Customer Signature **Date**

Exhibit B – Sample Letter of Credit (Voucher)



Application Number: 5319207

TARA Agency: Bright Horizons EdAssist Solutions

E: TARA@edlinktuition.com P: 1-866-285-3150

State and Federal Grant Funds Must Be Used Before WIOA-ITA Funds

Voucher/Letter of Credit for Training

This Voucher/Letter of Credit form certifies that the Chicago Cook Workforce Partnership Individual Training Account Program will honor payment of tuition and fees for the Customer as specified below. This is a one-time use document valid only for the following training.

Customer: Ashley Johnson Application Number: 5319207 Date Issued: 12/04/2018	School/Service Provider: City Colleges of Chicago Malcolm X College Enrollment Period: 12/11/2018 to 12/18/2018 Approved Course(s): test Amount: \$100.00
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Case Manager Instructions:

Print your name below before handing over this Voucher/Letter of Credit form to the Customer enrolled in the Chicago Cook Workforce Partnership Individual Training Account Program.

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Case Manager Signature

Date

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Print Name

Office Phone

Customer/WIOA Participant Instructions:

Sign your name below and take it with you when you enroll in the course(s) or program approved by the Chicago Cook Workforce Partnership. Deliver the signed Voucher/Letter of Credit for training to the school or educational provider. The training provider will then bill Bright Horizons for your tuition and/or related fees covered by the program.

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WIOA Participant Signature

Date

Educational Provider Instructions:

Please accept this voucher/letter of credit for training for the Customer on behalf of the Chicago Cook Workforce Partnership. Submit Itemized Invoice and supporting documentation (listed below) to Bright Horizons at the email address stated below for the courses and fees pertaining to this enrollment period.

1. An Itemized Invoice that states the name of each student, each course, the related costs and the course related fees.
2. The original signed voucher/letter of credit for training.
3. For each student on the Invoice, 4 weeks of attendance records on a school letterhead or on a printout from your institution, signed by the student.

If the customer withdraws from the approved course and is eligible for a refund, the refund must be issued directly to Bright Horizons.

Bright Horizons must receive your invoice along with this signed voucher/letter of credit within 60 days of the training start date listed herein. It is our intent to issue payment within 45-60 days of receipt of the complete billing package.

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Provider Name (Print)

Phone