



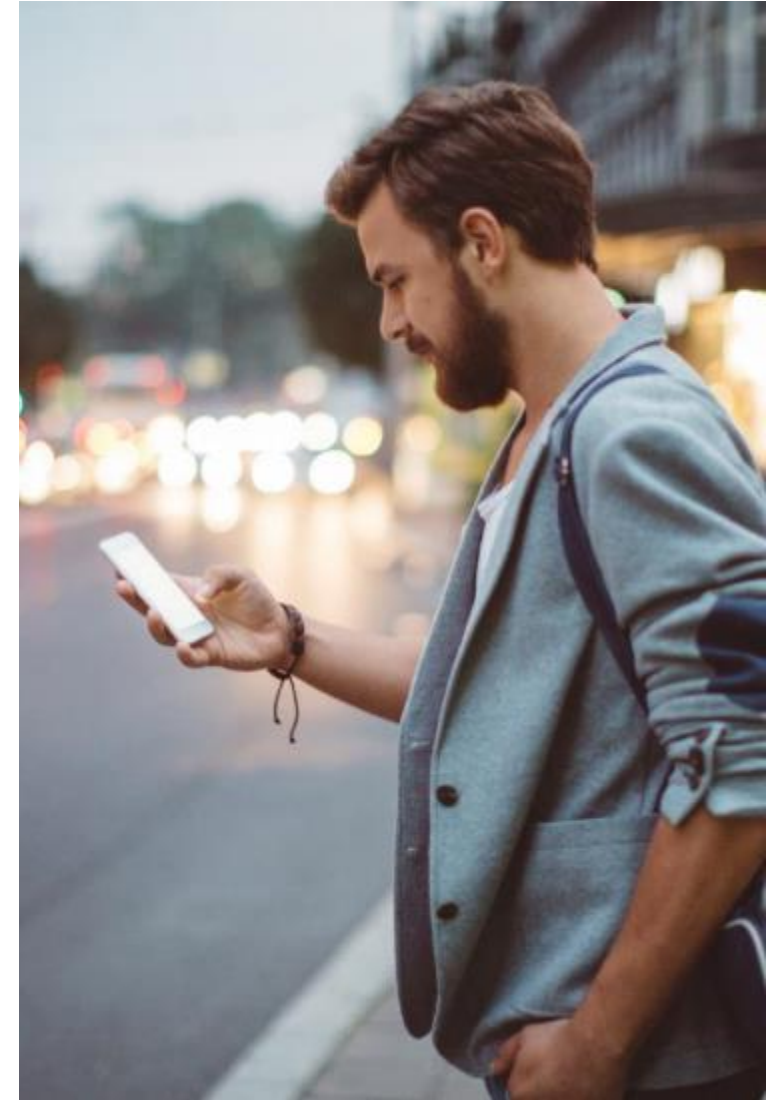
# VOUCHER TRAINING



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# Agenda

1. Pre-Voucher Guidance
2. Training Voucher Requirements
3. Supportive Service Voucher Requirements
4. Request to Exceed Training Cap
5. Processing Vouchers
6. Common Voucher Errors



# Pre-Voucher Guidance

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# Pre-Voucher Guidance

Before any type of training can be given, the provider must have completed the:

- Application
- Eligibility determination
- Enrollment process
  - The enrollment packet must be completed and submitted to the EMI Program Specialist
  - The enrollment packet must be reviewed and signed off by EMI Program Specialist
  - The completed enrollment packet must be uploaded to ASSET
  - A case note by the EMI Program Specialist showing that both Eligibility and Enrollment have been signed off on





# KNOWLEDGE CHECK

## QUESTION

Before starting a voucher career planners need to complete which of the following?

- A. Application
- B. Eligibility determination
- C. Enrollment process
- D. All of the above





# KNOWLEDGE CHECK

## QUESTION

Before starting a voucher career planners need to complete which of the following?

- A. Application
- B. Eligibility determination
- C. Enrollment process
- D. All of the above

## ANSWER

D. All of the above

# Training Voucher Requirements

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# Training Voucher Requirements

- Training eligibility determined
- Training voucher packet must include all required documents and steps indicated in EMI's Individual Training Account (ITA) Policy and Training Voucher Documentation Checklist.
- Training vouchers must be submitted to EMI at least 2 weeks prior to the training start date.
- Vouchers must be submitted to:  
[ITAVoucher@employmilwaukee.org](mailto:ITAVoucher@employmilwaukee.org)

Training vouchers must **never** be provided to training vendors prior to approval by EMI





# Training Voucher Requirements

Training voucher packet must include all required and applicable documents and steps indicated in EMI's Individual Training Account (ITA) Policy and Training Voucher Documentation Checklist con't.

- WIOA Programs Training Voucher Documentation Checklist
- Supportive Service Voucher Documentation Checklist
- Supportive Services Justification form
- Training-Related Supportive Service Breakdown form (completed by employer and approved by EMI)

A training-related Support Breakdown is not needed for:

- Educational institutions such as MATC, WCTC, etc.
- Cost reimbursements
- Vouchers that are only tuition based



# Training Voucher Requirements

Training voucher packet must include all required and applicable documents and steps indicated in EMI's Individual Training Account (ITA) Policy and Training Voucher Documentation Checklist.

- Eligible Training Provider List (ETPL) printout
- Resume
- TABE scores
- Career Assessment (Traitify, ONET – My Next Move, Career Locker)
- IEP/ISS
- Training Proposal (from vendor)
- Self-Sufficiency Calculation (Adult and Dislocated Worker)

Remember, training eligibility must already be determined.





# KNOWLEDGE CHECK

## QUESTION

Training vouchers must be submitted to EMI how many weeks prior to the training start date?

- A. At least one
- B. At least two
- C. At least three
- D. At least five





# KNOWLEDGE CHECK

## QUESTION

Training vouchers must be submitted to EMI how many weeks prior to the training start date?

- A. At least one
- B. At least two
- C. At least three
- D. At least five

## ANSWER

B. At least Two

# Supportive Service Voucher Requirements

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# Supportive Service Voucher Requirements

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Employ Milwaukee Supportive Services Justification Form must be included with any voucher where there is a supportive service cost:

- Justification of Services needs to be completed to show any costs that will be supportive services.
- The supportive services cost must match to the cost that shows on the voucher.

# Supportive Service Voucher Requirements

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WIOA Supportive Services Voucher Documentation Checklist must be included in any voucher where there is a supportive service cost.

If there is a cost reimbursement for the participant, the Employ Milwaukee Purchase Approval Request Form must be completed.

The form must be reviewed with Program Specialist and Program Manager.



# KNOWLEDGE CHECK

## QUESTION

True or False?

If there is a cost reimbursement for the participant, the Employ Milwaukee Purchase Approval Request Form must be completed.





# KNOWLEDGE CHECK

## QUESTION

True or False?

If there is a cost reimbursement for the participant, the Employ Milwaukee Purchase Approval Request Form must be completed.

## ANSWER

True

# Continuation of Training

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- This form is used with semester-based trainings.
- WIOA Programs Continuation of Training Voucher Attachment form must be included in the voucher packet.
- Voucher Effective From and Voucher Effective Through must be the dates of the semester (6 Month Maximum).
- Anticipated Training Start Date and Anticipated Training End Date must be the dates of the entire program.

# Continuation of Training



- Continuation of Training form must be submitted with voucher every semester of the program after the first semester.
- If participant goes over four (4) semesters, a Request to Exceed Training Cap must be submitted to exceed the duration cap.

## Continuation of Training



# KNOWLEDGE CHECK

## QUESTION

True or False?

Because the Anticipated Training Start Date and Anticipated Training End Date include the dates of a 2+ semester program, only one voucher is required for the entire length of the program.





# KNOWLEDGE CHECK

## QUESTION

True or False?

Because the Anticipated Training Start Date and Anticipated Training End Date include the dates of a 2+ semester program, only one voucher is required for the entire length of the program.

## ANSWER

False

A voucher must be submitted for every semester of the program.

# Request to Exceed Training Cap

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# Request to Exceed Training Cap

A request to exceed the training cap is required when the participant's training:

1. Is expected to last longer than four (4) semester.
2. When voucher is not semester based but training length exceeds 6 months.
3. Tuition cost will exceed 7k (7-year look-back period). If using for the dollar cap, contact EMI for information regarding any previously paid tuition costs if using for the dollar cap.



# Request to Exceed Training Cap

Must be signed by Career Planner and  
exception request case noted

EMI Program Manager must also approve  
the exception request and case note the  
approval





# KNOWLEDGE CHECK

## QUESTION

True or False?

A request to Exceed the Training Cap is needed any time a training is expected to last more than 6 mos. or 4 semesters.

## ANSWER





# KNOWLEDGE CHECK

## QUESTION

True or False?

A request to Exceed the Training Cap is needed any time a training is expected to last more than 6 mos. or 4 semesters.

## ANSWER

True



# Processing Vouchers

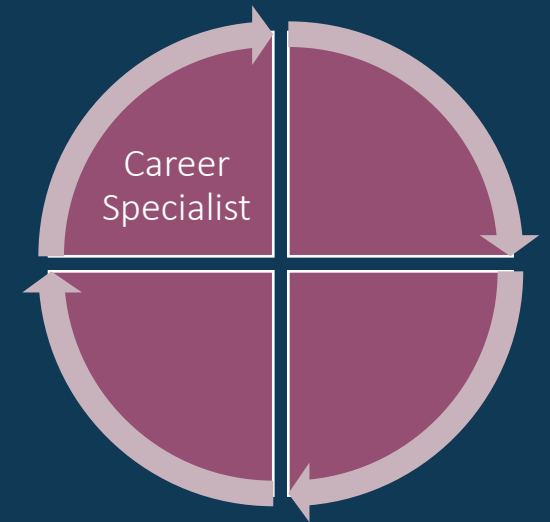
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# Processing Vouchers

## Career Planner:

- Ensures the plan includes the service
- Completes the voucher packet
- Reviews submission for errors
- Submit to EMI Program Specialist





# Processing Vouchers

Upon receipt, the EMI Program Specialist:

- Reviews the voucher
  - Vouchers with few errors – request information
  - Vouchers with multiple errors – returned **without** a detailed explanation of issues
- Approves the voucher
- Enters a case comment in ASSET
- Emails a notification to the Career Planner
- Forwards the voucher packet to EMI's Fiscal Department





# Processing Vouchers

EMI's Fiscal Department:

- Encumbers the voucher
- Routes the encumbered voucher to the Program Specialist







# Processing Vouchers

EMI Program Specialist:

- Emails the encumbered voucher to the vendor and cc Program Manager





# Processing Vouchers

Career Planner:

- Upload the encumbered voucher packet in ASSET





# KNOWLEDGE CHECK

## QUESTION

True or False?

Processing vouchers begins  
and ends with the Career  
Planner

## ANSWER



# KNOWLEDGE CHECK

## QUESTION

True or False?

Processing vouchers begins  
and ends with the Career  
Planner

## ANSWER

True



# Common Voucher Errors

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# Common Voucher Errors

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- Payment Method
  - 80%/20% after 30 Day Retention
  - Schooling vouchers 100% cost reimbursement
- Anticipated Training Start/End Dates
  - Vouchers for schooling that are multiple semesters
- Voucher Effective From/Through Dates
- 6 Month Maximum
- IEPs in packet are not signed



# Common Voucher Errors

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- Supportive Service Amounts
- Other Supportive Service
- Supportive forms do not clearly explain the supportive service costs
- Forms in voucher packet are for another participant
- ETPL listing in packets shows the wrong vendor
- Missing Financial Aid/Consumer Choice case notes





# KNOWLEDGE CHECK

## QUESTION

True or False?

MATC, WCTC, University of Wisconsin-Milwaukee, etc.) have an 80%/20% after 30 Day Retention.

## ANSWER





# KNOWLEDGE CHECK

## QUESTION

True or False?

MATC, WCTC, University of Wisconsin-Milwaukee, etc.) have an 80%/20% after 30 Day Retention.

## ANSWER

False

MATC, WCTC, University of Wisconsin-Milwaukee, etc.) have a 100% cost reimbursement.

# Thank you!

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