work systems	LWIB Policy ☐ WSI Policy ☑
Number: 0.4.0.44100.0 **New ☑ Revision ☐**	**Date: 1/1/2005**
Topic: I-Trac User Requirements	
Affected Programs: Adult, WIA Youth, Dislocated Worker, NEG, RRAA	

Purpose

To define the procedures and obligations for all companies and persons using Worksystems, Inc. I-Trac client tracking system.

Background

WSI makes use of Internet technologies to collect data and track performance. An Internet based data management system, I-Trac, is the primary system used for this.

References

Confidentiality ORS 658.600-610; OAR 123-70-210 through 250

Policy

All WSI staff and contractor staff whose job duties include using I-Trac will follow the procedures set forth in this directive. Training is facilitated by WSI staff. Individual user accounts will be issued to staff that successfully complete training.

Requirements

1. All staff with job duties that include inputting data, determining eligibility, and reviewing reports must attend and satisfactorily complete I-Trac training.
2. Each trainee must have access to an email account issued by their employer. Hotmail, Yahoo and other accounts of this nature are not acceptable.
3. Trainees must have a general knowledge of and the ability to demonstrate general Microsoft Word and Internet skills.
4. Participants in WIA programs are not eligible for I-Trac user accounts.
5. Training requests must originate from the Program Manager (or his or her designee).
6. User accounts will only be issued to staffs who sign the Acknowledgement of Confidentiality Regulations document.

Confidentiality Regulations

1. All information contained in I-Trac is confidential and shall not be disclosed to any person or organization except those authorized to use the information pursuant to WIA.

711 SW Alder Street, Suite 200 ✲ Portland, OR 97205 ✲ 503.478.7300 ✲ 503.478.7302 fax ✲ www.worksystems.org

2. All I-Trac users will comply with all applicable federal and state privacy and confidentiality laws. Failure to comply with such laws may result in a criminal prosecution or civil sanctions.
3. Access to I-Trac is authorized only to employees of a company authorized by Worksystems, Inc. to use the I-Trac client tracking system. Once a person with access to I-Trac is no longer employed with that company it is the responsibility of the company to immediately notify Worksystems, Inc..
4. Access may be terminated at any time without any prior notice. An I-Trac user will cooperate with any legitimate investigation concerning the misuse or misappropriation of information.
5. WSI can and will monitor activities related to the use of I-Trac, without notice.

Data Entry Timelines
Timelines are established to ensure that all data is current and that applications and certifications are processed in a timely manner to avoid disallowed costs, service delays and ensure accurate and timely data transmissions and reports. Except as noted below all information that is required to be entered into I-Trac must be entered within 7 days of the event that generated the information.

1. **Application** – Application information must be entered into I-Trac within 30 days of the collection of this information.
2. **Registration** – Registration interview information must be entered into I-Trac within 5 working days of the signature on the Registration form. Once the data entry is completed and the Interviewer and Reviewer information is entered it is mandatory that an Eligibility Determination Report (EDR) is printed and signed by the Customer, Parent or Guardian (if required), the Interviewer and the Reviewer. This document is then stored in the participant file.
3. **Participation** – Registrants must receive intensive services within 45 days of the Registration Interview date on the signed Eligibility Determination Report (EDR). If 45 days or more have elapsed Registration Interview date on the signed EDR then the Registration information must be updated and reviewed and a new EDR must be printed and signed by all. I-Trac does not allow service information entry until all of the above requirements are met.

Request for Training
Training requests must originate from the Program Manager (or his or her designee). Requests should be submitted via email to v3support@i-trac.org.

The request for training must include:

a. Name and Title of individual to be trained
b. Business Address
c. Business Phone
d. Business Email Address
e. Name of Contract and Site
f. Name of Supervisor

Account Issuance Notification
Trainees who successfully complete I-Trac training will receive notification of account status in the form of an email sent to the email address listed on the training request. The notification requests that the Manager or designee originating the request confirm that the authorizations are correct.

Account Closure
Companies with staff that who are using I-Trac are responsible for immediate notification to Worksystems, Inc. if that staff is no longer an employee. Worksystems, Inc. has the right to close or restrict individual user account authorizations at its discretion without prior notification to the account holder or the account holders company. Account holders will be notified of the reason for account change and requirements necessary to reopen or remove restrictions if necessary.

1. Requests to close user accounts must originate from the Program Manager (or his or her designee). The request must be made immediately following:
   a. Staff termination
   b. Transfer to a position that doesn't require use of I-Trac
   c. Non-compliance with Confidentiality guidelines
2. Requests should be submitted via email to v3support@i-trac.org.
3. The request to close an account must include:
   a. Name and title of the account holder

Contract compliance reviews will include an audit to determine that this account closure procedure is adhered to.

Contact: Questions should be directed to WSI Data Services, 503-478-7300 or email v3support@i-trac.org

Related Documents

Individual Access and Confidentiality Agreement form.

work systems
711 sw alder suite 200
portland, oregon 97205

i-trac client tracking system

I-Trac Client Tracking System

Individual I-Trac Usage and Data Confidentiality Agreement

This agreement acknowledges that the person named below has reviewed and understands the proper use of Worksystems, Inc. I-Trac client tracking system and the data contained in that system.

I______________________acknowledge the following terms and conditions.

1. I am an employee of a company authorized by Worksystems, Inc. to use the I-Trac client tracking system.
2. I understand that all information in I-Trac is confidential and shall not be disclosed to any person or organization except those authorized to use the information.
3. I will comply with all applicable federal and state privacy and confidentiality laws. Failure to comply with such laws may result in a criminal prosecution or civil sanctions.
4. I will access only during my period of employment with the company named below.
5. I will not use I-Trac for personal activities and will not share my username and password with anyone.
6. I have read and understand the attached Worksystems, Inc. Client Tracking Requirements Directive.

I certify that I have read the above document and that I have been advised of the confidentiality requirements and will comply therewith even after my authorization to use I-Trac has expired.

Printed Name: ____

Signature: ___________________________________Date: ___________

Company Name: ____