

Service Provider OJT Procedure and File Checklist

- LWIB should be contacted by emailing boffice@so14lwib.com on or before the start of the OJT and provided with the First Name, Last Name, Customer Phone Number, Last 4 of Social, Worksite Name, Start and End Date, and Supervisor Name and Contact Information. Failure to comply will result in a monitoring finding.
- The OJT Participant should have the following UPLOADED in IWDS 2.0 in addition to all other WIOA file requirements:

Uploaded: Y/N/NA	DOCUMENT LIST FOR (Customer Name)_____
	• <u>Work Experience and OJT Pre-Award Survey</u> ○ Completed by Service Provider BEFORE any other documents can be completed ○ If participant is under 18 and there is no background check completed for the worksite's supervisor then a sex offender search is attached to the survey uploads
	• <u>OJT Contract</u> with modifications as needed
	• <u>Participant Orientation</u>
	• <u>OJT Training Outline/Plan</u> with modifications as needed ○ Job Description should be attached to the WEX Outline/Plan ▪ Job Description can be written with the Employer (see page 3 of OJT Training Outline/Plan for more information on how to do this) ○ Career Planner should establish "OJT SPECIFIC SKILLS TO BE LEARNED" on the OJT Training Outline/Plan Section 2. These will have estimated hours to learn skill, start and completion date and an assessment method
	• <u>Universal Career Plan</u> signed in IWDS 2.0 with modifications as needed

	• <u>OJT Progress Report and Invoice (REPORTING PERIOD START DATE AND REPORTING PERIOD END DATE)</u> ○ Submitted each pay period to the Service Provider and includes a copy of the invoice/pay stub for each pay period ▪ Note those dates are the REPORTING PERIOD START DATE AND REPORTING PERIOD END DATE that is needed as part of the file naming for the file upload process that can be seen below in the HOW TO section below. ○ Section 1 and 3 MUST BE completed by Career Planner ○ Section 2,4, and 5 MUST BE completed by the Worksite Supervisor/OJT Provider ○ Section 3 of the OJT Progress Report and Invoice will evaluate those “OJT SPECIFIC SKILLS TO BE LEARNED” in Section 2 of the OJT Outline/Plan (please review those and transfer those exact skills to the WEX Progress Report). Again, this section MUST BE completed by the Career Planner ○ VERY IMPORTANT: SECTION 4 -Participant Time Sheets/Reimbursable Hours ▪ This is now the Participant Time Sheet ▪ A Running Total Each Pay Period Showing total hours worked and amount paid is found on page 4. This is to assist Service Providers with staying within established policy of no more than 1040 total hours over 6 months and no more than \$15,600 spent per employee unless LWIA Request for OJT Increase has been approved and on file.
	• <u>On The Job (OJT)/Work Experience (WEX) Local Monitoring Report</u> ○ Completed by Career Planner/Service Provider once per month for the duration of the contract. ▪ Can be done for your 30 day contacts ○ Initial On The Job (OJT)/Work Experience (WEX) Local Monitoring Report MUST BE completed within 30 days of the Start Date of the OJT. Monitoring findings will be issued if this is not completed within the time frame. ▪ Ex: Start 1/1 must be completed before 1/30
	• <u>LWIA Request for OJT Increase</u> ○ Only if needed
	• <u>Final Cost Report</u> from fiscal showing total hours worked and amount paid

HOW TO UPLOAD:

1. In the Customer Profile select Access Case Management Tools
2. In the Quick Links Side Bar select Plan
3. Navigate to the OJT Service Line
4. Select the Eyeball (Action Item) to the right of the OJT Service Line
5. Scroll down and select the blue Add File button in the Service Files section
6. Select the blue Select File button
7. Navigate to the desired file to upload and select Open
8. In the Alternate File Name Box type the **BOLD/ITALIC/UNDERLINED** to match the document name listed above next to each bullet point for the desired file
 - a. NOTE: take care to verify that the **BOLD/ITALIC/UNDERLINED** document name matches the list above. Failure to have the correct name will result in monitoring finding.
9. In the Document Type drop down select Other
10. If you have any notes such as updates or changes to the document, you can add this in the Notes section
11. Do #5-10 for EACH document listed above that is **BOLD/ITALIC/UNDERLINED**