



Department of Job and Family Services

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Jon Husted, Lt. Governor
Matt Damschroder, Director



WIOA Adult and Dislocated Worker

On-The-Job Training

Office of Workforce Development



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Welcome Introductions

- Heidi Quirion, WIOA Adult Dislocated Worker Employment Services Coordinator
- Local Areas: (1) Cindy Lindamood; (2) Grace Glaubman; (17) Susie Kooser
- ARIES: Jodi Jecker, Wendy Allison, ARIES Employment Services Coordinators
- CFIS: Mark Anderson, Project Manager
- WIOA Performance Measures: Emily Grover, Performance Manager/Gita Bharali, Social Sciences Research Specialist
- Monitoring: Graig Pellman/Tamtri Barnett, Monitoring Case Management Analysts

Housekeeping



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Agenda

- What is On-the-Job Training or OJT?
- Benefits
- Eligibility/Factors for both Participant & Employer
- Duration
- Invoicing/Reimbursements
- Special program participation: Registered Apprenticeship/ Trade
- Local Areas: Creating Local OJT Policy and OJT Implementation
- ARIES Case Management, CFIS and Performance Measures for OJT
- Monitoring
- Questions



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What is an On-the-Job Training (OJT)?

On-the-Job Training (OJT)



WIOAPL 15-22.1



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Benefits

- Increased employer engagement and industry partnerships
- Opportunity for employers to hire/develop/train participants with required skills
- During the training, participant is working/training AND getting paid
- Supports the fulfillment of an employer's workforce needs and increases training options for participants



OJT continues to be a key method for delivering training services to adults, dislocated workers and youth.



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The statutory and regulatory foundation for OJT is provided in the Workforce Innovation and Act, Public Law 113-128, the Trade Act of 1974, and their respective regulations:

WIOA Sections 134 and 188,
20 CFR 680.700 through 680.750, and
20 CFR 683.275.
2 CFR Part 200, Appendix II
WIOAPL 15-22.1

Training and Employment Guidance Letter (TEGL) 19-16



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How are On-the-Job Training Services Funded?

WIOAPL No. 15-11.1

Individual Training Accounts (ITA)

- Primary method for procuring WIOA Training Services
- Established on behalf of a WIOA participant to purchase a program of training services from eligible training providers
- Employers offering the OJT are entered into WIET as Local Providers



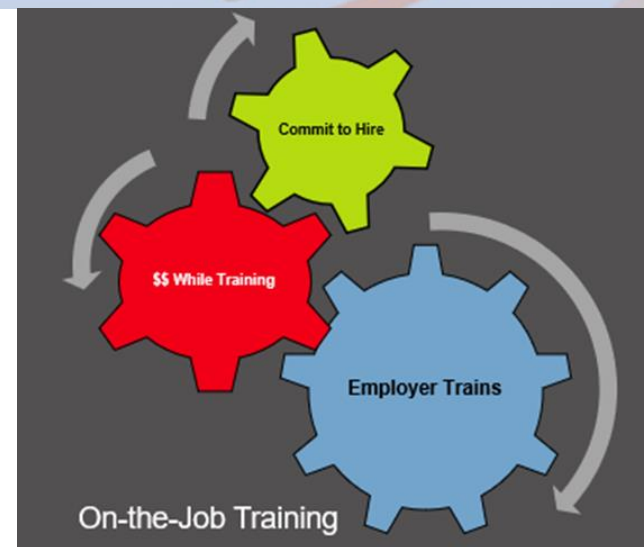
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Who's Eligible?

- Unemployed or under-employed adult and dislocated workers
- Employed but not earning a sufficient wage as determined by the Local Area
- Those who have completed occupational skills training via an ITA if it creates an opportunity for the participant to become employed





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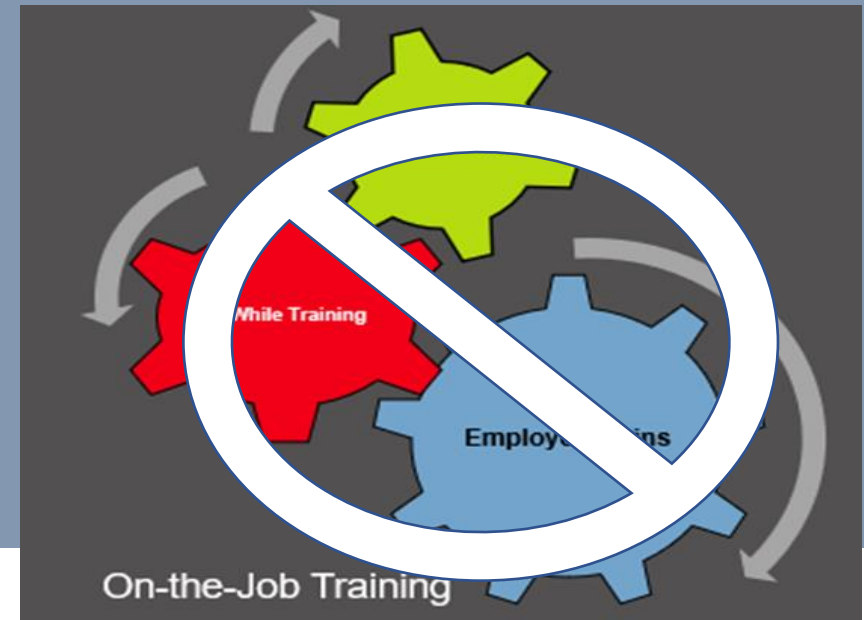


Who is not eligible?

Immediate family members of the Employer or direct Supervisors

Those receiving Needs Related Payments

**Refer to On-The-Job Training Guidance Manual
for additional examples of conflicts of interest*





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First Steps for Participant:

- Interview
- Evaluation or Assessment
- Career Planning

IF results show Participant has the skills/qualifications to participate in an OJT...



OJT Participation....





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Public, Private Non-Profit, Private For Profit Sectors

When selecting an employer, consider...

Working conditions

Wage structure

Health benefits

Turnover rates

Staffing and equipment

Compliance with laws



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Private Placement Agencies



- Temp Agencies can be eligible if the OJT requirements are met
- Local Workforce Development must develop OJT policy for private agencies



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Some of the Disqualifying Factors for Employers

- Presently *Debarred; suspended; declared ineligible*
- Have outstanding *Tax liabilities* for over 6 months with Ohio or other states prior to entering the OJT contract
- Have outstanding *civil, criminal or administrative fines* owed to or pending in Ohio
- *Failing to continually provide long term employment* to participants

Debarment: action taken by a Federal agency or official to exclude a person or business entity from participating in transactions involving certain federal funds.

Websites to consider for OJT approval (to check tax, environmental compliance and debarment status)

- Federal Debarment Site: <https://www.sam.gov> (Site to register to do business with the US Government)
- Ohio Department of Taxation: <http://www.tax.ohio.gov>
- Business Filing Search: <http://www.sos.state.oh.us>

Federal (Department of Labor/DOL) and State Accountability



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Durational considerations of OJTs

- Not to exceed 1040 hours, unless documented
- Those longer shall not exceed 2080 hours
- Factors involved in length of Training
(occupation, content of training, prior work experience, service strategy)
- Significant Barriers

To determine duration: Analyze tasks involved with job (+) O*NET system's Specific Vocational Preparation (SVP) Component...*OJT Guidance Manual*



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OJT's provide reimbursements to the employer for the extraordinary costs of training and the additional supervision related to the training, which usually is calculated at half the pay rate for the agreed-upon training period

...OJT Guidance Manual

Invoicing and Payments

OJT Reimbursements:

- Monthly (WIOA & Trade)
- At the Completion of Training (WIOA)
- Retention Model



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Prohibited Activities

- OJT funds cannot be used for political or sectarian activities with/by participants
- No participant union organizing or political engagement during work hours
- No participant employment in the construction, operation, or maintenance of any facility which is used for religious instruction or worship



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Registered Apprenticeship Programs



About Contact



**EARN WHILE YOU LEARN IN A REWARDING CAREER
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On average, apprentices who complete their programs earn \$60,000 a

[Learn about ApprenticeOhio's Incentive grant.](#)

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Meets Federal and State standards in Job Preparation

Special OJT Applications



EMPLOYERS

Build a skilled workforce and save money with a
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Special OJT Applications

Trade Eligible...OJT Interested...

- Trade participants can engage in Trade-funded OJT
- If participant is currently engaged in an OJT, then becomes Trade certified/eligible, Trade funds can be used in the next OJT payment point
- Co-Enrollment in both WIOA & Trade required



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Resources [On-the-Job Training \(OJT\) | Office of Workforce Development | Ohio Department of Job and Family](#)

On-the-Job Training (OJT)

On-the-Job Training is a federally-funded program that helps employers hire and train individuals for long-term employment.

For more information, contact your [OhioMeansJobs center](#).

Listed below are technical resources for our program operators.

Training and Technical Assistance

[Forms and Templates](#) provides samples for local use as instructed in the OJT Comprehensive Policy.

WIOAPL 15-22.1 [On-the-job training \(OJT\) Policy](#) of January 2018, outlines policy and provides direction to local areas.

[OJT Guidance Manual](#) "how to" guide for On-the-Job trainings.





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Purpose of the On-the-Job Training Guidance Manual

- Provide basic standards and suggestions for operating subsidized OJTs for both WIOA and Trade Adjustment Assistance
- Encourage consistent OJT protocols and processes
- Provides required forms and templates for local level use, as well as direction in locating the official State forms
- Increase the use of OJTs



On-the-Job Training

GUIDANCE MANUAL



REV 07/2018



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Creating your Local Area OJT Policy

- Purpose and Goals of OJT in Area 2
- Participant Eligibility and Suitability
- Employer Eligibility
- Wage and Reimbursements

Grace Glaubman
Deputy Director

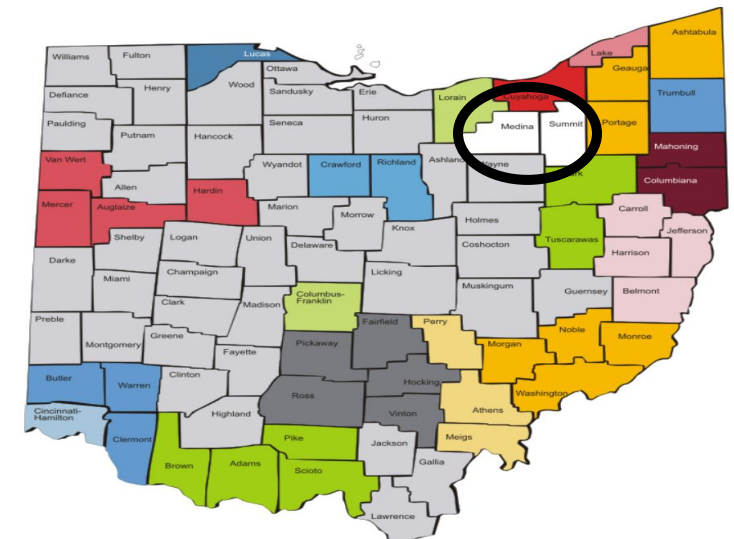
Area 2



Summit and Medina
Workforce Area
Council of Governments



Summit & Medina Counties
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Participant Eligibility & Suitability

Participant Suitability and Appropriateness



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For an individual to qualify for any training services, including OJT, the Area 2 career services providers must determine a person is a suitable and appropriate candidate for training services. Appropriateness is determined by completion of an interview, evaluation or assessment and career planning. Assessments may include, but not limited to:

1. A combination of standardized tests;
2. Inventory of interests;
3. Skills assessments;
4. Career exploration;
5. Evaluation of the participant's soft skills, including time-management, work ethic, and dependability;
6. Past work history; and
7. Available labor market data.

Area 2



Employer Eligibility

Area 2

Employer Eligibility

OJT is provided under an agreement with an employer in the public, private non-profit, or private for-profit sector to WIOA eligible participants. Careful consideration should be given when selecting a participating employer. Business functions Area 2 must research before selecting an employer include, but are not limited to:

1. Working conditions (safety and health);
 - a. Area 2 must conduct at least one on-site visit to observe working conditions prior to signing an OJT agreement with an employer.
2. Availability of employer-provided health benefits;

 - a. An employer must provide optional health insurance benefits in order to be considered for an OJT agreement.
3. Wage structure;
 - a. An employer must pay its employees no less than twice per month; and
 - b. Employees must be paid a regular wage that is not commission-based.
4. Turnover rates;
 - a. General turnover rates of the employer, as well as longevity and retention of former OJT employees, must be considered.
5. Adequateness of staff and equipment to carry out the training; and
6. Compliance with federal, state and local laws.



Employer Eligibility

4. The WDB or CCMEP lead agency must not enter an agreement with an employer who has previously exhibited a pattern of failing to provide OJT participants with continued long-term employment.
 - a. Three (3) or more incomplete or unfinished training plans during the length of the OJT agreement (one year), for any reason, constitutes a pattern of failing to provide OJT participants with continued long-term employment.
 - b. Should a pattern of failing to provide continued long-term employment be determined, the employer must agree to more intensive monitoring for the remainder of the agreement period. Monitoring of all subsequent OJTs will be monthly rather than at the halfway point and end of training only.
 - c. Additionally, should a pattern of failing to provide continued long-term employment be determined, the employer will become ineligible to receive an OJT from the reverse-referral process for the remainder of the agreement.
 - d. If less than 50% of the employer's OJT employees are employed at the 90-day post-OJT retention point, it is at the discretion of the Area 2 Executive Director whether to renew the employer's OJT agreement with the Area.



Employer Eligibility

Area 2

Candidate Referral Policy

1. Employers using OJT to train new hires must be willing to accept referrals from the OhioMeansJobs (OMJ) career services staff in the Area. Employers are not required to hire referred candidates but are asked to make a good-faith effort to screen and consider candidates referred by OMJ career services staff.
2. All candidates must be determined suitable and appropriate for the position prior to being granted an OJT. The candidate referred must be determined eligible for OJT, be fully assessed, and be exposed to other career services as appropriate.
3. Area 2 reserves the right to decline an OJT for any “reverse-referral” (referred to OMJ by the company) candidate who is deemed ineligible for WIOA, unsuitable, or inappropriate for the job, field, or OMJ services.





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WAGES & REIMBURSEMENT

Wages

The minimum hourly rate an OJT trainee can earn is \$15.00, unless the O*NET OnLine occupation code wage information for the employer's zip code shows a wage higher than \$15.00 per hour at the "low end" (10th percentile for all workers with that job title in that zip code). The employer must begin, at minimum, at that 10th percentile wage on O*NET OnLine if it is higher than \$15.00 per hour and agree to a wage progression plan adding at least \$0.50 per hour to the employee's wage by the end of the training period. Wages must be regular and not commission based.

Reimbursements

Wages are reimbursed directly to the employer after receipt of an invoice (using the OJT Invoice Form) and corresponding pay stubs that clearly state hours worked and hourly wage, as well as approval by Area 2 staff.

The payment schedule is as follows:

1. Employer may invoice at the halfway point and end of the training period. NOTE: if training is planned to last 3 months or less, the employer shall invoice once, at the end of the training period;
2. Area 2 shall reimburse the employer half of the trainee's wages at the halfway point should the training plan greater than 3 months;
3. Area 2 shall withhold a portion of the trainee's wages until the trainee has been retained by the employer for 90 days following the end of the training period, verified by the employer AND the trained employee.

The withheld amount shall be calculated as follows:

- a. If the total estimated wages to be reimbursed on the training plan is less than or equal to \$4,000.00, Area 2 will withhold \$500.00 from the final reimbursement until the employee has been retained for 90 days following the end of the training period.
 - b. If the total estimated wages to be reimbursed on the training plan is greater than \$4,000.00, Area 2 will withhold \$1,000.00 from the final reimbursement until the employee has been retained for 90 days following the end of the training period.
4. Example: A trainee has made \$10,000.00 in wages at the end of a 3 month training period. Area 2 shall reimburse the employer 50% of those wages, equaling \$5,000.00 total, but withholding \$1000.00 until the trainee has been confirmed to have been retained by the employer for 90 days following the last day of the agreed training period. The employer would be owed \$4000 at the end of the training period and \$1000 after 90 days of retention.
 5. Some employers may be exempt from the reimbursement schedule under certain circumstances which are determined exclusively by the Area 2 Executive Director.
 6. Employers utilizing OJT through Summit County are limited to eight (8) plans per annual agreement. Employers utilizing OJT through Medina County are limited to five (5) plans per annual agreement. An OJT plan counts against the limit once one invoice has been processed and paid.



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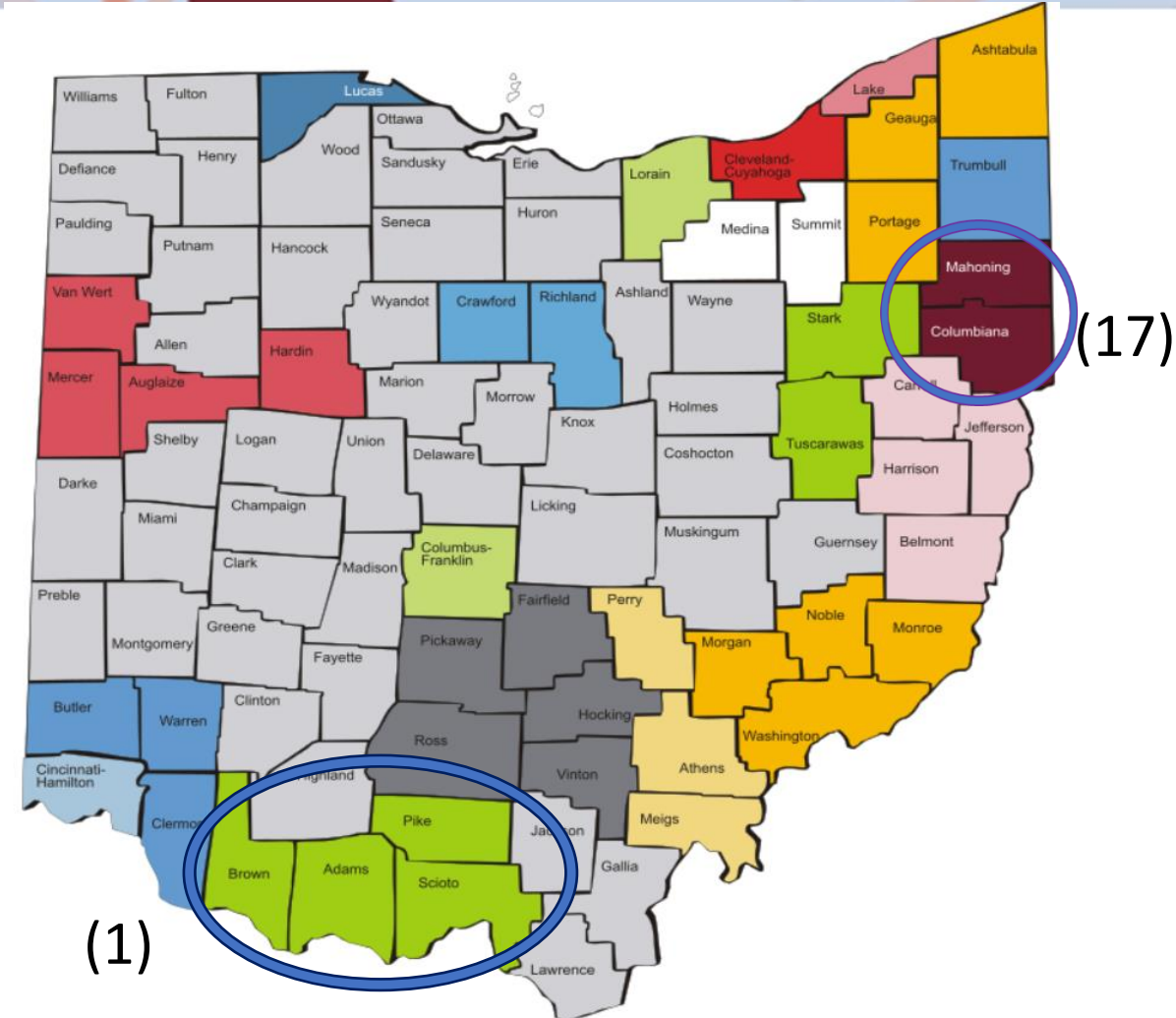
OJT Process & Best Practices

Local Areas:

(1) Cindy Lindamood

&

(17) Susie Kooser





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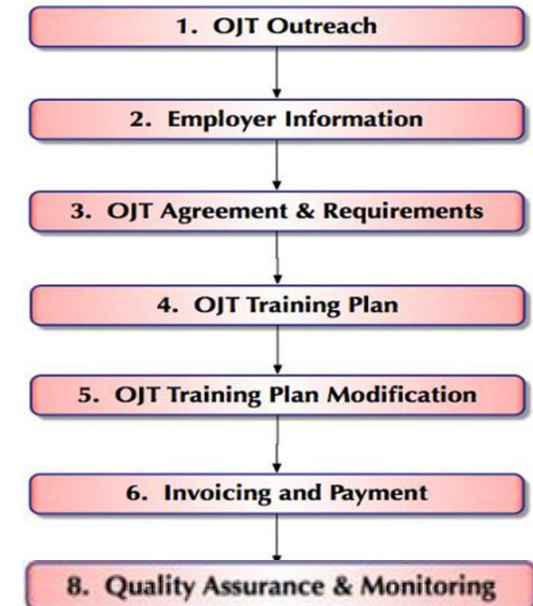
[On-the-Job Training \(OJT\) | Office of Workforce Development | Ohio Department of Job and Family](#)

Local Areas 1 & 17

Summary of OJT Program

Local Area Best Practices/Lessons Learned

STEPS IN CONDUCTING AN OJT





OJT Outreach

- Utilize our Business Service Team
- Share out through the BRN grant when we deliver proposals
- Network through our WDB as well as past and current employers who have utilized the OJT Program

Employer Information

Once an opportunity to provide an OJT service has been identified, the process starts with the completion of the Employer Plan of Service form. (Employer Checklist for Area 17) This form provides the required information for approving an employer/worksites for the service. Information includes:

- Employer information: name, address, phone number, contact person, etc.
- Corporate information: business status, EIN, Worker's Compensation policy number, number of employees, bargaining unit involvement, relocation/expansion plans, current lay-off information, availability of personnel policies/grievance procedures, etc.
- Position specific information: job title, pay rate, schedule, and duties (we request a copy of the job description for a detailed list of duties that will be used in the development of the training plan).
- Other details to assist with the recruitment of appropriate applicants: minimum educational/experience requirements, transportation requirements, applicant prescreening methods (skills testing, drug screen, BCI/FBI background check, BMV report, etc.).

OJT Agreement & Requirements

- New employers must meet specific requirements provided on the Employer Checklist and they are sent to the Program Services Manager in Area 17 and the Adult Program Coordinator in Area 1.
- Employer must agree:
 - To give us a two-week processing time for eligibility
 - ~ Some of this is due to trainees gathering the paperwork we need to complete intake
 - Employer must be willing to hire whether eligible or not
 - Hire full-time, permanent employees (minimum of 32 hours per week)
 - Pay a minimum of \$13.00 per hour (Area 17)
 - Provide the training that was approved on a submitted training plan which will be discussed in more detail on a later slide.
 - Submit monthly invoices with time sheets
 - Allow us to come on-site to monitor (Area 17)
- Area 1 does not have a minimum wage requirement as long as the state minimum wage is met
- And Area 1 does reimbursements at 3 pay points

OJT Training Plan

- Identify skills required for the position by reviewing the job description and speaking with employer.
- Identify current skill level of eligible applicant based upon previous experience/education.
- Work with employer to identify how much time is needed to learn each task.
- Assign training hours to each task on the training plan (1040 maximum).
- Enter tasks and approved hours in the training outline portion of the contract; also enter the training tasks on the midpoint and end of training evaluation forms provided to the employer. (For Area 17 they review training tasks monthly)

OJT Training Plan Modification

- Modifications must be requested no less than 7 business days prior to the date the modification is to go into effect. (Area 1 does not have this same requirement, however they do want employers to notify them ahead of time whenever possible.)
- Modifications could be due to a wage increase, a change to the length of time due to illness, or a position change, which would also require a new training plan that has previously been approved for the employer.



Invoicing and Payment – Area 17

- Reimburse monthly
- Employers are required to turn in all invoices with payroll verification by the 10th of the following month.
- The time sheets are also another method for us to monitor because it provides an area for employers to provide information on the trainee's attitude, attendance, willingness to work, etc.

Invoicing and Payment – Area 1

- CAO provides reimbursement of 50% of wages paid during the approved training period; this subsidy is only paid on hours the participant actually worked (no sick/holiday/vacation, etc.); OJT Time and Attendance Record forms are completed by the employer and sent to CAO on a monthly basis to document hours worked.
- Reimbursements are provided at three payment points: midpoint of training hours, completion of training hours and at the 30-day retention period.
 - At midpoint of training hours: once time and attendance records and the training evaluation form are received through the midpoint of the contracted training hours, reimbursement of 30% of the total contract amount is made to the employer.
 - At the completion of training hours: once time and attendance records and the training evaluation form are received through the end of the contracted training hours, reimbursement of 30% of the total contract amount is made to the employer.
 - At 30 days retained: once the Employment Retention Verification form is received from the employer, the 40% balance of the total contract amount is paid to the employer.



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Quality Assurance & Monitoring

Area 1

- Each employer has an assigned Career Specialist as their point of contact; contact between our staff and worksites is ongoing (weekly/bi-weekly).
- CAO Career Specialists have contact at least one time each month (more as needed) with all enrolled participants.
- A formal evaluation is completed and documented by the worksite supervisor at the midpoint and end of the approved training contract.

Area 17

- Monitor monthly on-site
- We monitor the employer and the trainee
- When monitoring, we are also asking the employer to share if the trainee hits skills gain in their training so we can enter the skills gains easily into ARIES and have our back-up documentation.



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Brochures/JFS 08109 can be ordered... <http://www.odjfs.state.oh.us/forms/?adlt=strict>

NOTICE: Fill-in PDF links in Form Central are currently displaying an error message when clicked.

We are aware of the issue and are working to fix it. In order to open Fill-in PDFs, please see our [instructions for downloading and viewing PDF forms](#).

Search results for: jfs 08109

Form Number	Description	PDF	ONLINE	MS EXCEL	MS WORD	HARD-COPY	Revision Date
JFS 08109	YOU HIRE, YOU TRAIN, WE PAY ON THE JOB TRAINING (OJT) (BROCHURE)	PDF					11/2021
New Search							

HOW DO I GET STARTED?



For more information about On-the-Job Training or for help recruiting skilled workers, contact your local OhioMeansJobs center.
To find your nearest OhioMeansJobs

EMPLOYER TESTIMONIALS

"Thanks to On-the-Job Training programs offered through state funding in Ohio, SPSI has changed its hiring practices for skilled positions within the company. On-the-Job Training has provided SPSI the capabilities to train potential employees who lack the skill set needed in today's demanding industry."

— Jerry Stethem,
Executive Vice President
and Chief Operating Officer,
Scott Process Systems, Inc.

"This program has provided Republic the opportunity to expand our steelmaking operations in Canton, Ohio, by adding approximately 55 employees (previously dislocated workers) to our production units to date and training them in operating and maintenance jobs."

— Melisse Boyd,
Director, Corporate Human Resources,
Republic Engineered Products

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State of Ohio

Matt Damschroder, Director
Ohio Department of Job and Family Services

JFS 08109 (Rev 11/2021)

Ohio
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**YOU
HIRE,
YOU
TRAIN,
WE
PAY.**

**ON-THE-JOB TRAINING
PROGRAM**



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ARIES

Case Management, CFIS & Performance Measures

Your caseload is empty



BUILDING Ohio's Workforce
CREATING Innovative Solutions
PROMOTING Economic Independence and Growth

All information is accurate as of today

Customer Search - Search for a customer before adding New Seeker

Search Tips:

- ☐ Use unique information or combinations
 - Ex. Unique name, street, email (without domain) or last 4 of SSN
- ☐ Use filters to refine your results
- ☐ Keep record of customer IDs
- ☐ Only the 1st 1000 records are returned

Training Provider Search - Always search for the provider before beginning plan. Will need to add on WIET: <https://wiet.ohio.gov/wiet/>



BUILDING Ohio's Workforce
CREATING Innovative Solutions
PROMOTING Economic Independence and Growth

Program Enrollment?

□ Education/Training

- Services classified as “Direct ITA” must be entered on the Plan
- All services entered on the Plan to render in the future
- Services entered on the Plan must be rendered when provided

Creating an IOP – General Information

Create a new Individual Opportunity Plan (IOP) for HARRY POTTER

This customer does not have a current IOP. Complete the form to create a plan.

1

General information

2

Employment

3

Goals, activities, and services

4

Training plan

5

Terms and conditions

6

Customer signature

General information

Plan name *

OJT Test Plan

13 / 255

Plan type *

Employment

Assessment basis *

[Initial Assessment \(09/12/2022\)](#)

Set assessment basis

Performance Measures In Focus

Obtain employment (full or part time)

Customer

HARRY POTTER

Creating an IOP – General Information

Plan creation date *

11/18/2022



Date in mm/dd/yyyy format.

Education

Highest school grade

12th school grade



School status

Not attending school



Highest education level

GED or High School Equivalent



Date of Highest Education level achieved

07/30/2022



Edit education on customer profile

Discard form

Save & continue later

Continue to next step

Creating an IOP – Employment

 Program Dashboards

 Group Services

 Reports >

 TAA >

 Administration >

 Events

 RESEA Assignment

 Financial Management

 Forms Catalog

 Bulk Uploads

 Complaints

OMJ Occupation Search

Workforce Data Tools



General information

Employment

Goals, activities, and services

Training plan

Terms and conditions

Customer signature

Past employment

 **Add past employment**

Labor Market Information

[View relevant labor market information](#)

Target Occupation

Target Occupation

Keyword or O*NET-SOC Code

☐ Chapter 31 Employment

In-demand field?

Yes

No

Discard form

Back to previous step

Save & continue later

Continue to next step

Creating an IOP – Goals, Activities, and Services

✓

(2)

3

✓

✓

(6)

[General information](#)[Employment](#)[Goals, activities, and services](#)[Training plan](#)[Terms and conditions](#)[Customer signature](#)

Goals, services and activities

Employment

✕ Remove goal

Goal details

Goal *

Employment

10 / 100

Type *

Employment

Barriers

Lacks work experience

21 / 4000

Services

+ Add a planned service

Activity/Action steps *

Attend orientation with Employer - Set up schedule and complete OJT paperwork

Performance Measures In Focus

Obtain employment (full or part time)

Complete training or certification

Increase earnings

Creating an IOP – Goals, Activities, and Services

Goal *

Employment

Type *

Employment

Barriers

Lacks work experience

Services

 Add a planned service

Activity/Action steps *

Activity/Action steps is **required**

Location

Schedule

Start date *

Start date is **required**

Planned end date

Date in mm/dd/yyyy format.

Supportive services

All services

Program *

WIOA Adult

Service name	Service type	Requires approval	Actions
Filter service name	training ×	Filter requires ... ▼	Clear all
ABE or ESL in conjunction with Training	Training Service	No	+
Adult education and literacy activities in combination with other job skills	Training Service	No	+
Apprenticeship On-the-Job Training	Training Service	Yes	+
Customized Training	Training Service	Yes	+
Entrepreneurial Training (non- WIOA Youth)	Training Service	Yes	+
Job Readiness Training in conjunction with other training	Training Service	No	+
Occupational Skills Training (non- WIOA Youth)	Training Service	Yes	+
On-the-Job Training (non- WIOA Youth)	Training Service	Yes	+
Other Non-Occupational Skills Training	Training Service	Yes	+
Registered Apprenticeship	Training Service	Yes	+

Creating an IOP – Goals, Activities, and Services

Barriers

Lacks work experience

21 / 4000

Services

On-the-Job Training (non- WIOA Youth)

Service type: Training Service

For program: WIOA Adult

Planned duration *

11/30/2022 – 03/31/2023



 Add a planned service

Activity/Action steps *

Here is where you will list specific steps customer needs to complete to meet their goal(s).

94 / 4000

Location

123 Location St

15 / 100

Schedule

If appropriate

14 / 100

Start date *

11/30/2022

Date in mm/dd/yyyy format.

Planned end date

Date in mm/dd/yyyy format.

- 
1. Take Tour of Plant
 2. Finalize OJT paperwork
 3. Call me after first day of work
 4. Reach out throughout with questions
 5. Complete/Pass work milestones
 6. Complete OJT
 7. Participate in Follow Up communications

Creating an IOP – Training Plan

Create a new Individual Opportunity Plan (IOP) for HARRY POTTER

This customer does not have a current IOP. Complete the form to create a plan.



General information

2

Employment



Goals, activities, and services

4

Training plan



Terms and conditions

6

Customer signature

Training plan

Use this form to plan for all types of training services necessary to address an individual's barriers to employment



Select State training program



Select Local training provider



This data is populated
by the information
entered into WIET.

Discard form

Back to previous step

Save & continue later

Continue to next step

Creating an IOP – Training Plan

HARRY POTTER (ID: 322539382)

< Customer Services

Create a new Individual Op

This customer does not have a current IOP. Co

✓

General information

Training plan

Use this form to plan for all types of traini

+

 Select State training program

Select Local Provider

Local Provider search term *

Simple

Search

Name	Status	Location	Address	Actions
Simple Times LLC	Approved	primary location	750 Cross Pointe Road, Suite M, Columbus, Ohio COLUMBUS OH 43230	⋮
Simplified Facilities Group, Inc	Approved	primary location	588 Ternes Lane EL	⋮
Sample Machining DBA Bitec	Denied	primary location	220 N Jersey St., Da DAYTON OH 45403	⋮
Sample Service Center LLC	Closed	primary location	15644 State Route 136 Winchester, Ohio WINCHESTER OH 45697	⋮
Sample Service Center LLC	Denied	primary location	15644 State Route 136 WINCHESTER OH 45697	⋮

Items per page: 5 1 – 5 of 7 < >

Select Provider

Find Program

Creating an IOP – Training Plan

Training plan

Use this form to plan for all types of training services necessary to address an individual's barriers to employment.

On-the-Job Training

 Remove training program

Training program details

Scheduled breaks

Are there scheduled breaks of 30 days or more? * : ☐ Yes ☒ No

Program category *
On the Job Training

Occupation code
Maintenance and Repair Workers, General

Cost
12000

Keyword or O*NET-SOC Code

Supportive services

 Add supportive service

Discard form

Back to previous step

Save & continue later

Continue to next step

With a Local Training Provider selected, this form opens.

Creating an IOP – Terms & Conditions

Group Services

Reports >

TAA >

Administration >

Events

RESEA Assignment

Financial Management

Forms Catalog

Bulk Uploads

Complaints

OMJ Occupation Search

Workforce Data Tools

Customer

Search



Create a new Individual Opportunity Plan (IOP) for HARRY POTTER

This customer does not have a current IOP. Complete the form to create a plan.













General information

Employment

Goals, activities, and services

Training plan

Terms and conditions

Customer signature

Review terms & conditions

Development of this Individual Opportunity Plan (IOP) requires that you and a case manager work closely together to achieve your goals.

The purpose of this document is to discuss your needs, record your current situation, determine actions and services needed, and record results. This plan must be jointly developed, completely understood, and have your full commitment. The information contained within this IOP represents a general plan of services and/or training intended to result in employment or another appropriate outcome. It is neither an entitlement to such services nor a contract between the program and the participant. These services and goals are totally dependent upon the availability of resources in the program of enrollment.

By signing below, you attest that you understand the meaning and purpose of this IOP. Your signature acknowledges that any changes in your situation must be reported immediately to your case manager so this IOP may be amended and updated before any further action is taken.

I give my approval for JFS staff, OhioMeansJobs Center staff and partner agencies to exchange and disclose necessary information about me for services to be provided to me by all programs administered via the JFS, OhioMeansJobs Center and/or partner agencies

Note: Additional acknowledgements may be required dependent upon the program of enrollment.

Staff signature *



Sign here *

David Felty

Current Date

9/12/2022



Discard form

Back to previous step

Continue to next step

Creating an IOP – Customer Signature

The screenshot shows a web application interface for creating a new Individual Opportunity (IOP). The main form is titled 'Create a new Individual Opportunity' and includes a progress bar with two steps: 'General information' (completed) and 'Employment' (current). The 'Customer signature' section is active, showing instructions for requesting e-signature and manual confirmation. A modal window titled 'Confirm customer acceptance' is overlaid on the form. The modal contains a checkbox for 'The customer has signed and accepted the IOP', a section for 'Document upload (optional)' with file upload options and size limits, and a 'Staff signature' field. The modal also has 'Cancel' and 'Confirm acceptance' buttons. The background form has buttons for 'Request customer e-signature', 'Confirm', 'Discard form', and 'Back to previous step'. A 'Back to IOP list' button is also visible on the right side of the form.

Confirm customer acceptance

Customer signature

Click the checkbox below to confirm the customer has reviewed, and provided their signature to accept the IOP.

☐ The customer has signed and accepted the IOP

Document upload (optional)

Upload documentation related to the customer acceptance (such as a signed copy of the IOP).

Choose File for upload Copy already uploaded File

Max size: 5MB: doc, docx, gif, jpg, pdf, png, rtf, tif, tiff, txt, xls,xlsx, csv
Max size: 900MB: mp4

Staff signature *

Cancel Confirm acceptance

Customer acceptance history

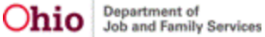
11/22/2022

Manually confirmed with documentation by | Kyle Caseworker

Signed IOP.doc

Adding Services in CFIS

- Open CFIS and search for client
- Existing clients can be “retrieved” and new client must “imported”



CFIS Web
Coshocton - Montgomery County JFS
CLT Functions --> Case/Services



Mark Anderson | [Home](#) | [Help](#) | [Logout](#)

Master CLT Functions CLT Reports

Search

SL Name

LAW07 - Montgomery County JFS

Client Last Name

Date of Birth

Case Mgr. ID

Case Status

Open

Vendor Number

Project

Sub-Area

S0716 - Coshocton - Montgomery County JFS

Client First Name

SSN

Show

Case Mgr. Last Name

Eligibility

--All--

Vendor Name

Services Between

and

Client ID

Case ID

Case Mgr. First Name

Type

--All--

PO Number

Service Status

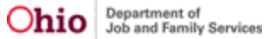
--All--

Reset

Search

Retrieving Existing Client in CFIS

Existing client ready to retrieve new services



CFIS Web
Coshocton - Montgomery County JFS
CLT Functions --> Case/Services



Mark Anderson | Home | Help | Logout

MasterCLT FunctionsCLT Reports

Case Plan

SL NameLAW07 - Montgomery County JFS

ClientVickers, Destinee
334955644

Case ID17252825

Participation Date09/07/2022

Notes[Show](#)

Edit

Sub-AreaS0716 - Coshocton - Montgomery County JFS

Retrieve from WCMS

Case Manager

Case StatusOpen

Eligibility[More](#) WIOA_ADULT

[View Client Limits](#)

[View Set-Aside](#)

[Show More Info](#)

SaveCancel

Services

Search

Eligibility	Project	Service	Start Date	End Date	Vendor	Vendor Program	PO Number	Service Amount	Service Status	Type	
Edit WIOA_ADULT	WIOA Adult Program	On-the-Job Training (non...	09/11/2022	02/28/2023	16311			\$12,859.13	New	Dir	Activity
Total								\$12,859.13			

Back to List

Close CaseDelete

Importing a New Client in CFIS

Click Add from WCMS (ARIES) and enter client in Search

1
2
3
4
5
...
>>

Add from WCMS

Montgomery County JFS
Sub-Area
S0716 - Coshocton - Montgomery County JFS

Client

Search

Client ID

Last Name

Smith

(at least One character)

SSN

Show (Full)

Date of Birth

First Name

John

(at least One character)

SSN

XXX-XX-

(last Four digits)

Status

Active

Reset

Search

	Last Name	First Name	Client ID	Date of Birth	Status
Select	SMITH	JOHN		04/21/1983	Active
Select	SMITH	JOHN		01/01/1949	Active
Select	SMITH	JOHN		09/26/1994	Active

Entering Client Funding in CFIS

- All CLT fiscal processing is on this screen

Service Detail

Eligibility

WIOA_ADULT - WIOA Adult

Service

On-the-Job Training (non-WIOA Youth) - [TNG_ (Direct Services)

Project

FWB

...

WIOA Adult Program

Vendor

16311

...

PSI INDUSTRIAL SOLUTIONS, INC.

Vendor Program

--Select--

Notes

OJT

Contract Amount

13000.00

Recalculate

Service Status

New

Service From

09/11/2022

To

02/28/2023

PO Number

...

Clear

WCMS Provider

WCMS Program

Denial Reason

Back to List

Review

Deny

Save

Close

Additional Assistance with CFIS

- If you need any assistance with CFIS or would like a more detailed training please contact Mark Anderson at mark.anderson@jfs.ohio.gov

Entering Client Funding in CFIS

- In CLT
 - Identify funding in the “Project” box
 - Select the vendor in the “Vendor” box
 - Enter the service amount in the appropriate month, select the “Authorized” box, select the “Start Date” for the service in that month and “Save”
 - “Review” the service
 - “Approve” the service (must have Case Manager authority)
- **Once “Approved” the service can be rendered in ARIES the next day after the nightly batch process**

Approved Services on IOP

Planned services

On-the-Job Training (non- WIOA Youth)

Approved

Service type: Training Service

For program: WIOA Adult



Service details

Planned duration

11/30/2022-3/31/2023



Completion status



Render service

Edit service details

Rendering Planned Services on IOP

ARIES

Customer

Search

Group Services

Reports

TAA

Administration

Events

RESEA Assignment

Financial Management

Forms Catalog

Bulk Uploads

Complaints

OMJ Occupation Search

Workforce Data Tools

Customer Services

Cases

UI C

Plans

Remove goal

required

approved

service details

Goal for HARRY POTTER - Complete STNA

Goal information

Goal created on 09/12/2022 by DAVID FELTY

Planned services

Supportive Services- Assistance with Transportation

Service type: Basic Career Service - Staff Assisted

For program: WIOA Adult

Occupational Skills Training (non- WIOA Youth)

Service type: Training Service

For program: WIOA Adult

Service details

Planned duration

9/9/2022 – 11/30/2022

Completion status

Render service

Service planning

Add and submit services to this goal

Render service for HARRY POTTER

Please review the information below for the service prior to rendering. If a comment or document is required, please visit the customer dashboard to make those changes after rendering the service.

Service date

09/18/2022

Recording staff

Staff *

Kyle Caseworker

To select a staff, click on the button next to this input.

Office *

OhioMeansJobs Summit County

Service details

Program

WIOA Adult

Service code

On-the-Job Training

To select a training program, click on the button next to this input.

Training program *

On-the-Job Training

To select a training program, click on the button next to this input.

Anticipated training duration

Cancel

Render service

60

Rendered Services on IOP

Planned services

On-the-Job Training (non- WIOA Youth)

Rendered

Service type: Training Service

For program: WIOA Adult



Service details

Planned duration

11/30/2022-3/31/2023



Completion status



View rendered service

Edit service details

Customer Services Tab

ARIES

Customer

Search

Group Services

Reports

TAA

Administration

Events

RESEA Assignment

Financial Management

Forms Catalog

Bulk Uploads

Complaints

OMJ Occupation Search

Workforce Data Tools

Customer Services

Cases

UI Claimant

Case Notes

Customer Eligibility and Enrollment

Plans

Customer Services

Start Date *
08/14/2022

End Date *
09/13/2022

Filter Services

Record New Service

Entry date	Actual date ↓	Office	Last modified by	Service name	Program / Grant	Status	Actions
Filter	Filter	Filter	Filter	Filter	Filter	Filter	
09/18/2022	09/18/2022	OhioMeansJobs Su...	DAVID FELTY	On-the-Job Training	WIOA Adult	Open	
09/13/2022	09/13/2022	OhioMeansJobs Su...	DAVID FELTY	Supportive Services...	WIOA Adult	Completed	
09/12/2022	09/09/2022	OhioMeansJobs Su...	CFIS County Financ...	Career Planning	WIOA Adult	Completed	

Items per page: 10 1 - 3 of 3

Employer Services-Add an OJT Service

Company Accord home services, llc (id: 62643976) Summary

Name : Accord home services, llc

State Tax ID : 52665176

FEIN : 201078645

[Dashboard](#)

Event Registrations

Services Rendered

Recruiters

Locations

Case Notes

Record a service for Accord home services, llc

Service Date *

11/28/2022

**WIOA Performance Measure:
Effectiveness in Serving Employers**

**Based on Repeat Business (receive services more than once
within the previous three program years.**

Training Milestones

Individual Opportunity plan (IOP) for Joan Smith

Status

This plan is active

General Information

Employment

Goals

Training Plan

Training program: On-the-Job Training

View details

WIOA Performance Measure:
Measurable Skill Gain: Making satisfactory Training Progress

ollment

Plans

Customer Financial Management

Customer Test Scores

Customer Event Registrations

Training program for Joan

Training program information

Training program created on 11/22/2022

Training milestones

Add up to 12 training milestones to this training program

No.
No.
N

+ Add a training milestone

Back to IOP

New training milestone

Training milestone date *

11/22/2022

MM/DD/YYYY

Does the customer have a satisfactory progress report towards an established milestone from the employer or training provider? *

Yes

No

Is the customer on track to complete the training on schedule? *

Yes

No

Training milestone related documents

Choose File for upload

Copy already uploaded File

Max size: 5MB: doc, docx, gif, jpg, pdf, png, rtf, tif, tiff, txt, xls, xlsx, csv

Max size: 900MB: mp4

Cancel

Submit training milestone

Customer Service Completion

ARIES

Customer

Search

Group Services

Reports

TAA

Administration

Events

RESEAAssignment

Financial Management

Forms Catalog

Bulk Uploads

Complaints

OMJ Occupation Search

Workforce Data Tools

On the Job

☒ Training (non- WIOA Youth)

Service End Date

09/13/2022

State or Local *

State

Select State Program

Provider name

STNA Everyday Plus

Program name

STNA Training

Program Category *

Other Occupational Skills Tr...

Position

Anticipated Start Date

09/13/2022

Date in mm/dd/yyyy format.

Anticipated End Date

11/30/2022

Date in mm/dd/yyyy format.

Actual Start Date

09/13/2022

Date in mm/dd/yyyy format.

Actual End Date *

09/13/2022

Date in mm/dd/yyyy format.

Completion Status *

Incomplete - Customer Dro...

Certificate Earned

Certificate Date

Date in mm/dd/yyyy format.

Cancel

Void Service

Save

WIOA Performance Measure:
Measurable Skill Gain: Training
Completion



Program Completion

Customer Services

Cases

UI Claimant

Case Notes

Customer Eligibility and Enrollment

Customer Eligibility and Enrollment

Create New

Program Name	Eligibility Start Date	Eligibility End Date	Eligibility Determination	Enrollment Start Date	Enrollment Status	Office	Actions
Filter	Filter	Filter	Filter	Filter	Filter	Filter	
WIOA Adult	11/18/2022	02/15/2023	Eligible	11/18/2022	Active	1-0-1 OhioMean...	View Enrollment View Eligibility Determination

Items per page: 10

Office of Workforce Development

Privacy Policy

1

Program Enrollment

Program Name

WIOA Adult

Program Completion

+ add Program Completion

ADD

2

New Program Completion

Completion information

Reason for Program Completion *

Employment

Date of Program Completion *

11/23/2022

Date in mm/dd/yyyy format.

Additional information

Successfully completed the OJT

☐ Opt-out of Follow-up

Outcome information

Employment

Employed *: ☒ Yes ☐ No

Employment Start Date *

11/23/2022

Date in mm/dd/yyyy format.

Training Related *: ☒ Yes ☐ No

Agricultural Employment *: ☐ Yes ☒ No

Self-Employed *: ☐ Yes ☒ No

Entered in Military Services *: ☐ Yes ☒ No

Hours per week *

40

Only include numbers.

Employer name *

Greenville Door Sales, Inc.

Search for an employer

Occupation *

Maintenance and Repair Workers, General

Keyword or O*NET-SOC Code

Annualized Wage *

\$48,000.00

Credentials

Credential Earned *: ☐ Yes ☒ No

WIOA Performance Measure:
Employment

3

Back

Submit

Follow Up (12 months)

New Case Note for Joan Smith

Note Date *

Note Date is required

Category

Case Notes Title *

Case Note *

//

0 / 8000

☐ Confidential Case Note

☐ Note contains sensitive health information

Choose File for upload

Copy already uploaded File

Back

Submit

Dashboard

Follow Up Surveys- Cases tab

Participation follow up

Exit date: 11/23/2022

Quarter	Quarter start	Quarter end	Action
Q0	10/01/2022	12/31/2022	View
Q1	01/01/2023	03/31/2023	View
Q2	04/01/2023	06/30/2023	View
Q3	07/01/2023	09/30/2023	View
Q4	10/01/2023	12/30/2023	View

Follow Up Plan

WIOA Performance Measures:

Employment: 2nd & 4th Quarter wages
at Exit

And Effectiveness in Serving Employers
Retention: participants who exit and are
employed with same employer

<

Customer Services

Cases

UI Claimant

Follow Up Survey 0 for Joan Smith

☒ Employed

Training Related *: ☒ Yes ☐ No

Employer *
Greenville Door Sales , Inc

Employer NAICS *
547896

Occupation *
Maintenance and Repair Workers, General

Wage *
\$25.00

Hours per week *
40

Employment Category *
In unsubsidized employment

Training or educational enrollment *
Not enrolled in training or education

Date Enrolled in Post Exit Education or Training Program

Traditional Employment *: ☒ Yes ☐ No

☐ Same Employer as Last Quarter

Wage Unit *
Hourly

Type of Recognized Credential

Credentials

Credential Earned *: ☐ Yes ☒ No

Credential Date

Type of Recognized Credential

Back

Submit



Department of Job and Family Services

Mike DeWine, Governor
Jon Husted, Lt. Governor
Matt Damschroder, Director

Monitoring Key Highlights:

- Documents Reviewed
- Monitoring visits
- Information verified

On-the-Job Training (OJT): N/A				WIOAPL 15-22.1	
Note: Employers can be reimbursed up to 75% for an OJT					
1. Does the IEP reflect OJT as an appropriate activity?			Yes	No	
2. Does the training plan outline the skills to be learned?			Yes	No	
3. Does the file contain evidence to justify the length of training?			Yes	No	
4. Were the OJT training plans signed by: Employer Local Workforce Agency Trainee Union (if applicable) ODJFS Trade Program (if applicable)			Yes	No	
5. Was there a monitoring process to ensure satisfactory progress of the participant?			Yes	No	
6. If yes, was there timely monitoring?	Yes	No	Documentation:		
7. Does the reimbursement amount reflect an appropriate percentage of wages based on the local OJT policy?			Yes	No	
8. Date Entered Training:		9. Date Exited Training: (if active, mark N/A)			
10. OJT Employer:		11. OJT Job Title:			
12. OJT Begin Wage:		13. OJT Ending Wage:			
14. Was each skill attained as a result of training?			Yes	No	



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WIOA OJT Resources

- <https://jfs.ohio.gov/owd/WorkforceProf/OJT.stm> (OJT Guidance Manual/Forms/Policy)
- Local Areas:
 - 1: Cindy Lindamood/clindamood@caosciotocounty.org
 - 2: Grace Glaubman/grace.Glaubman@workforcearea2.org
 - 17: Susie Kooser/skooser@mctaworkforce.org
- ARIES_Helpdesk@jfs.ohio.gov & Chat
- CFIS: mark.anderson@jfs.ohio.gov
- Performance: Emily Grover@jfs.ohio.gov
<https://jfs.ohio.gov/owd/WIOA/Performance/index.stm>
- WIOA: WIOAQNA@jfs.ohio.gov



**Department of
Job and Family Services**

Mike DeWine, Governor
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Questions?

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