



## Procedure

<b>SECTION: WIOA, WTP and Business Services</b>	<b>POLICY#018-C0011b</b>	<b>PAGE: 1 of 13</b>
<b>TITLE: On-the-Job Training (OJT)</b>		<b>EFFECTIVE DATE: 5.3.19</b>
<b>REPLACES: N/A</b>		<b>DATED: N/A</b>

### **DISTRIBUTION: CAREERSOURCE TAMPA BAY STAFF**

**PURPOSE:** To provide guidance to CSTB WIOA, WTP and Business Services staff on administering On-the-Job Training program services. Staff must adhere to the CSTB BOD Policy on Work Based Learning On-the-Job Training that was approved by the Board of Directors. Additionally, Business Services and Program staff will be responsible for utilizing the procedure guide when administering On-the-Job training services in Region 15.

**BACKGROUND:** On-the-Job Training (OJT) is a work-based training that provides WIOA eligible participants occupational skills essential to the performance of a specific job. OJT addresses critical workforce needs, enhances skills of eligible participants and aids eligible employers in attaining qualified, skilled workforce with competencies needed to meet employer’s needs.

#### **PROCEDURE:**

The OJT Program is sponsored and administered by CareerSource Tampa Bay (CSTB) Business Services and Programs department. Programs funding sources include WIOA Adult, Dislocated Worker, Youth and Welfare Transition Program – TANF (Temporary Assistance to Needy Families).

OJT is designed to provide an opportunity for WIOA/WTP eligible individuals to receive the training necessary to acquire skills and knowledge that will enable them to maintain unsubsidized employment and/or job advancement.

OJT is a viable pathway for unemployed workers seeking employment and for employers seeking workers. It offers the unique opportunity to offset initial training costs to fill skilled positions while building organizational productivity as the employee learns job requirements.

Business Services Dept. is responsible for conducting economic development and employer recruitment to promote CSTB employer value added services. If an employer indicates an interest, the Business Services staff will provide an overview of CSTB programs and services and then secure the CSTB “master contract”. Once the CSTB master contract is secured by Business Services it will be submitted to the CEO or their designee for required signature. Once the contract is fully executed the Business

Services Program Coordinator will notify CFO, Programs Director and Director of Policy, Performance and MIS.

From that point forward the Programs Department will be responsible for working to fill the OJT position with either active WIOA program participants completing occupational skills training, customers in job search activities or new WIOA applicants. The Programs Department designated staff will be responsible for completing the required work-based learning OJT programmatic forms for enrollment.

The Programs Department staff will be responsible for ongoing case management of the WIOA and/or WTP program participant. The Programs Department designated staff will also manage all correspondence with the employer associated with any OJT candidate referrals for consideration. They will forward appropriate OJT candidates to the employer as well based on identification of active WIOA program participants and WTP program participants. The Programs designated staff will be responsible for the following case management action items:

- Communicate OJT enrollments to MIS for enrollment into EF/OSST
- Communicate with Finance to create the Microix budget
- Conduct follow-up with both the employer and program participant through the duration of the OJT
- Conduct OJT Monthly Progress reports and document all contacts and transactions in appropriate state databases contingent upon funding (WIOA-Employ Florida and WTP- OSST).

If during any point of the process, after notifying Finance of the initial enrollment the Program staff become aware of a candidate no longer participating in the OJT program, Programming staff will notify Finance so a de-obligation of funds may be processed.

Upon completion of the OJT, the Programs designated staff will also be responsible for processing the invoice and payment. This will require close coordination between Programs and Finance Department.

## **Processing Timeline**

In order to establish appropriate expectations with employers, CSTB is establishing a 10 business day rule for processing candidates for consideration from employers. Of course, the employer would need to already have an established contract with CSTB in order to process referrals for open positions for placement into OJT opportunities.

## **Flexibility**

We need to ensure that our service delivery is nimble to meet employer needs. There may be issues that arise with certain employers where we need to customize our approach to have Program staff onsite due to PII restrictions. Some employers may have a structured established process and our onsite presence would work better to accommodate screening of potential candidates. This would allow CSTB Program staff to explain the benefits of the WIOA to program applicants, determine if they would be interested in accessing these services, conduct pre-screening of WIOA eligibility determination onsite and provide feedback to the applicant and employer. These customized accommodations for the employer would be the exception not the standard service delivery flow for the OJT model. These needs would need to be discussed and addressed at the initial contact by the

Business Services Account Executive and the information shared with the Programs staff to ensure appropriate and timely coordination.

### **Demand for Occupation in Labor Market**

To access the CareerSource Tampa Bay Targeted Occupations List:

<http://www.careersourcetampabay.com/files/public/TOL/Copy%20of%20PY%2018%2019%20CSTB%20TOL.pdf> CSTB TOL changes on an annual basis at the beginning of each PY. Business Services and Program staff should review and familiarize themselves with the TOL.

### **Occupation Eligibility**

Not all jobs are appropriate for OJT. The emphasis on training automatically eliminates all jobs that require no more than a brief initial orientation period. Similarly, because reimbursements are intended to compensate the Employer for decreased productivity, jobs that pay by commission or piecework are inappropriate. Additionally, seasonal, temporary and part-time jobs should likewise be avoided because the desired outcome of OJT is long-term retention into full-time employment that leads to self-sufficiency.

The assessment process is used to substantiate that each trainee has a need for the training that is to be provided and has the capability to benefit from this training. The decision to assign a participant to OJT should be based on consideration of the individual's employability skills, skill deficiencies, and interests.

Trainees who already possess a substantial portion of the skills required to perform the job should not be placed into OJT positions. The responsibilities that accompany the use of public funds demand that expenditures for training activities be confined to situations where there is a documented need for training; mere subsidies for business or financial incentives to hire are avoided. Thus, the selection of Trainees for OJT should be carefully governed by a well-thought out process. The skills already possessed by the participant must be considered along with the skills required to do the job.

### **Skills Gap Analysis (SGA)/ OJT Training Plan Development**

Following the execution of the OJT Employer Agreement, an individualized OJT Training Plan must be developed for the acquisition of skills that the trainee does not already possess. Skills the trainee acquired from previous work or life experiences are transferrable and can be used in every occupation, regardless of the type of work. Transferrable skills are unlike job-related skills, which tend to be used only in one type of work. This plan will contain occupationally specific skills that the employer requires for competency in the OJT occupation. OJT funds should not be used for orientation to standard operating procedures of the employer.

An analysis of the trainee's prior work history, transferrable work skills and the job skills gained must be compared to the job skills/job description the employer requires in the OJT occupation. The resulting gap in skills will be the basis for the development of the Training

Plan. The Specific Vocational Preparation (SVP) data found in the O\*NET Online database for that particular occupation will be used and adjusted to determine the length of training necessary to acquire the needed skills.

Each skill description should be concise and the individual tasks should be measurable and observable. The specific types and sources of information used to identify the scope of the skills gap must be included in the participant's case file.

Although the primary focus of OJT is training in job-specific skills, it is sometimes necessary to build in activities that simultaneously address needed basic and/or work readiness skill deficiencies as part of the overall OJT Training Outline Plan.

There are a number of assessment tools available that may be used to conduct a skills gap analysis and provide adequate documentation of the process used to develop the Training Plan. These include Prove It!™, an Internet-based assessment tool used to determine an individual's level of skills in a particular occupation and to document skill deficiencies, as well as the O\*NET Online website and [www.myskillsmyfuture.org](http://www.myskillsmyfuture.org) which have both been developed by the U.S. Department of Labor. Currently CSTB utilizes the DOL assessment – My Next Move which can be found at: <https://www.mynextmove.org/>. This online assessment is linked to the O\*NET Interest profiler.

### **Duration and Rationale of OJT Training**

Traditionally, OJT is limited to a maximum of six (6) months or 1,040 hours. The length of the training, which will be determined by CSTB staff, should take into consideration the amount of time required for a participant to become proficient in the occupation for which training is being provided (skill requirements of the occupation, the academic and/or occupational skill level of the participant, and prior work experience). The length of the OJT will be documented in the OJT contract with the employer and the participant's individual career plan.

Staff will also consider results attained from assessments as well as referencing the O\*Net OnLine (<https://www.onetonline.org/find/>) which list a Specific Vocational Preparation (SVP) Code.

Specific Vocational Preparation, as defined in Appendix C of the *Dictionary of Occupational Titles*, is the amount of lapsed time required by a typical worker to learn the techniques, acquire the information, and develop the facility needed for average performance in a specific job-worker situation.

SVP Codes should be used as the baseline for duration determination. The baseline hours listed should not prohibit on-the-job training agreement durations and may be adjusted depending on the individual's skills gap. The chart below is to be used as a baseline reference.

SVP Code	Level Time Explanation	Estimated Hours
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1	Short demonstration only	160
2	Anything beyond short demonstration up to and including 1 month	240
3	Over 1 month up to and including 3 months	320
4	Over 3 months and including 6 months	500
5	Over 6 months and including 1 year	640
6	Over 1 year up to and including 2 years	800
7	Over 2 years up to and including 4 years	960
8	Over 4 years up to 10 years	1,040

The staff will research each occupation under “Find Occupations” by either keyword or ONET SOC Code:

### Find Occupations

#### Keyword or O\*NET-SOC Code

Customer Service   
 Examples: 25-1011.00, dental assistant

Enter a word, phrase, or title to search for an O\*NET-SOC occupation.  
 Enter a full or partial O\*NET-SOC code to look up occupations by code.

Below is a sample Summary Report for Customer Service:

#### Summary Report for: 43-4051.00 - Customer Service Representatives



Interact with customers to provide information in response to inquiries about products and services and to handle and resolve complaints.

**Sample of reported job titles:** Account Manager, Account Representative, Call Center Representative, Client Services Representative, Customer Care Representative (CCR), Customer Service Agent, Customer Service Representative (Customer Service Rep), Customer Service Specialist, Member Services Representative, Sales Facilitator

Also see: [Patient Representatives](#)

View report: **Summary** Details Custom

[Tasks](#) | [Technology Skills](#) | [Tools Used](#) | [Knowledge](#) | [Skills](#) | [Abilities](#) | [Work Activities](#) | [Detailed Work Activities](#) | [Work Context](#) | [Job Zone](#) | [Education](#) | [Credentials](#) | [Interests](#) | [Work Styles](#) | [Work Values](#) | [Related Occupations](#) | [Wages & Employment](#) | [Job Openings](#) | [Additional Information](#)

#### Tasks

5 of 15 displayed

- ☛ Confer with customers by telephone or in person to provide information about products or services, take or enter orders, cancel accounts, or obtain details of complaints.
- ☛ Check to ensure that appropriate changes were made to resolve customers' problems.
- ☛ Keep records of customer interactions or transactions, recording details of inquiries, complaints, or comments, as well as actions taken.
- ☛ Resolve customers' service or billing complaints by performing activities such as exchanging merchandise, refunding money, or adjusting bills.
- ☛ Complete contract forms, prepare change of address records, or issue service discontinuance orders, using computers.

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#### Technology Skills

5 of 37 displayed [Show 13 tools used](#)

- ☛ **Customer relationship management CRM software** — Blackbaud The Raiser's Edge 🔥; Parature eTicket, Salesforce software 🔥; Telemation e-CRM
- ☛ **Data base user interface and query software** — Customer service knowledge generation software; Data entry software 🔥; FileMaker Pro, Microsoft Access 🔥
- ☛ **Enterprise resource planning ERP software** 🔥 — Microsoft Dynamics 🔥; NetSuite ERP 🔥; Oracle PeopleSoft 🔥; SAP 🔥
- ☛ **Medical software** — Healthcare common procedure coding system HCPCS 🔥; Medical condition coding software 🔥; Medical procedure coding software 🔥; MEDITECH software 🔥
- ☛ **Network conferencing software** — Active Data Online WebChat, eStara Softphone, Parature eRealtime, Timpani Chat

## Additional information disabled on the ONET Search includes:

- Knowledge, Skills, Abilities, Work Activities, Detailed Work Activities, Work Context, Job Zone, Education, Credentials, Interests, Work Styles, Work Values, Related Occupations, Wages & Employment Trends and Job Openings on the Web.

## Specific Vocational Preparation (SVP)

Specific Vocational Preparation is a component of Worker Characteristics information found in the *Dictionary of Occupational Titles* (U.S. Department of Labor, 1991).

Specific Vocational Preparation, as defined in Appendix C of the *Dictionary of Occupational Titles*, is the amount of lapsed time required by a typical worker to learn the techniques, acquire the information, and develop the facility needed for average performance in a specific job-worker situation.

This training may be acquired in a school, work, military, institutional, or vocational environment. It does not include the orientation time required of a fully qualified worker to become accustomed to the special conditions of any new job. Specific vocational training includes: vocational education, apprenticeship training, in-plant training, on-the-job training, and essential experience in other jobs.

SVP information can be found under the section Job Zone, where an SVP Range is provided.

In the example below, the SVP Range for Customer Service Representative is 4.0 < 6.0.

### Job Zone

<b>Title</b>	Job Zone Two: Some Preparation Needed
<b>Education</b>	These occupations usually require a high school diploma.
<b>Related Experience</b>	Some previous work-related skill, knowledge, or experience is usually needed. For example, a teller would benefit from experience working directly with the public.
<b>Job Training</b>	Employees in these occupations need anywhere from a few months to one year of working with experienced employees. A recognized apprenticeship program may be associated with these occupations.
<b>Job Zone Examples</b>	These occupations often involve using your knowledge and skills to help others. Examples include orderlies, forest firefighters, customer service representatives, security guards, upholsterers, and tellers.
<b>SVP Range</b>	(4.0 to < 6.0)

Next review the employer's job description and/or the job tasks listed on the O\*NET summary report to determine the job tasks for the OJT training. Along with the employer, choose the seven to ten most important job tasks for which the trainee needs to be trained. Then use the trainee's assessment to determine the trainee's current skill level for each task. Now you can determine how long it will take the trainee to become proficient at each skill. This will determine the length of the training plan needed based on the participants existing skills. The training plan length may be less than the SVP range, but it cannot exceed that range. In all cases, the case notes for the trainee should indicate the basis for determining the number of hours of training included in the OJT contract.

This is outlined on the OJT Training Outline I which is part of the OJT Contract.

## Participants with Previous Experience in the Occupation

An individual who possesses knowledge or skills essential to the full and adequate performance of the specific occupation for which the OJT is proposed may not be placed into an OJT in that occupation. While strict compliance with this principle is inherent in the concept of OJT, in reality many jobs are unique and do not present an exact match of the skills required for jobs with other employers, even where the job title is identical. Thus, even where an individual has some relevant experience or training, the need for OJT may still be substantiated through the assessment process. In addition, a lack of contemporary application of skills or a change in technology may necessitate additional training. All of which can be considered with sufficient justification for training services outlying the specific need and skill level on the OJT Training Outline I which is part of the OJT Contract

### **Previous Employer of Applicant**

As with employer referrals, where a candidate for training is a previous employee of the business wishing to provide OJT, the CSTB Program staff must carefully examine whether the proposed training involves skills and duties that are substantially the same as the previous job. This lack of new or upgraded skills is a valid reason to prohibit an OJT.

If, however, there is adequate reason to enter into the agreement, e.g., a new job or upgraded job at a higher rate of pay, then OJT can be justified for a proportionately reduced duration. Additionally, regular contract management oversight must substantiate that training is occurring and that the Trainee is not spending excessive time performing the duties of the previously held job. No matter what the decision yields, the outcome must be communicated timely to the employer so they understand the reason behind the decision by CSTB.

### **Marketing Materials**

CSTB Marketing Department will be creating promotional materials that the Business Services Account Executives and the Programs staff will utilize to promote the OJT program to potential applicants. Additionally the Marketing Department will also develop talking points for employers to utilize when promoting the benefits of this program to potential applicants prior to referring them to CSTB.

### **Trainee Skill Evaluation**

For the OJT to be considered successful, the participant must have sufficiently learned the skills included in the plan in order to retain employment. Ideally, a participant should meet the employer's standards for each skill. In some situations, however, the participant may not have fully met every skill listed in the plan, but the employer has made a concerted effort to provide training and wishes to retain the participant and continue working on skill development. This would also be considered a successful outcome for the participant.

### **Quality Assurance and Monitoring**

Every OJT work site should be visited regularly. The first visit should occur prior to the execution of the OJT agreement. At this time, the Work Based Training Onsite Assessment must be reviewed and completed by the Business Services staff. Care should be taken to understand the employer's business and to explain OJT rules, requirements and partnership commitment. When individual training plans are approved, the worksite can be visited again to ensure that the skills listed in the training plan are accurate and that the training length is

appropriate given the trainee's prior related work and education. Remember that the responsibility of ongoing management shifts from Business Services to Programs Department once the master agreement is executed.

The Programs designated staff will communicate OJT enrollments, conduct follow-up with both the employer and program participant through the duration of the OJT, conduct OJT Monthly Progress reports and document all contacts and transactions in appropriate state databases contingent upon funding (WIOA-Employ Florida and WTP- OSST). Frequent onsite visits at the OJT employer worksite may be necessary to address any issues that arise during program participation.

The onsite monitoring of the OJT must include documenting information received directly from the trainees. It also should capture the trainee supervisor's perspective about how the training is progressing throughout participation. These "quality assurance" visits can be combined with job development efforts. More than one training plan may be checked during a single quality assurance visit.

CSTB Program staff must monitor the OJT to ensure that the job specific skills outlined on the OJT Training Plan I are actually being achieved. Measurable Skills Gain (MSG) which is a key WIOA performance indicator under WIOA can be documented through progress reports by the employer during OJT participation. The Monthly Progress Report documents progress towards skills outlined in the training plan, measures level of proficiency of skills at that snapshot and captures MSG documentation. Program staff must closely review this information obtained on the Monthly Progress Reports and enter information into EF for WIOA program participants and into OSST for WTP program participants.

Finally, the work site should be visited at or near the training's completion to ensure that the training has been substantially delivered. This provides Program staff with an opportunity to address the CSTB invoice requirements and payment process.

### **Monthly Follow-Up**

All active OJT agreements must be followed up on no less than every thirty (30) days by the CSTB Program staff. Follow up contacts must be documented via detailed case notes in Employ Florida for WIOA and OSST for WTP. The case note should summarize the status of the training and the progress that the trainee is making toward the goals of the OJT.

### **Invoicing and Payment**

Programs staff will maintain the XXXXX Work-Based Learning Tracking Report on the U Drive documenting participant name, last four of the candidate social, funding source, start/end date, employer details, duration, total amount, TOL number, etc. This will be updated on a weekly basis. When spreadsheet is being updated, if the Programs staff is made aware of any candidate that doesn't complete the program, for any reason, they should notify Finance to determine if a de-obligation is necessary.



Designated Programs staff will track the completion of OJT positions and work directly with employers to ensure that required OJT reimbursement forms and supporting documentation is submitted timely for processing.

Upon completion of the OJT, employers will be required to complete Attachment II – Individual OJT Reimbursement Form, which will be sent to the employers from the Programming staff for initial review. The form identifies the employer name, # of weeks, hours and total reimbursement amount being requested. This form along with supporting documentation will be submitted by the employer to the appropriate programming staff. Supporting documentation MUST include the following:

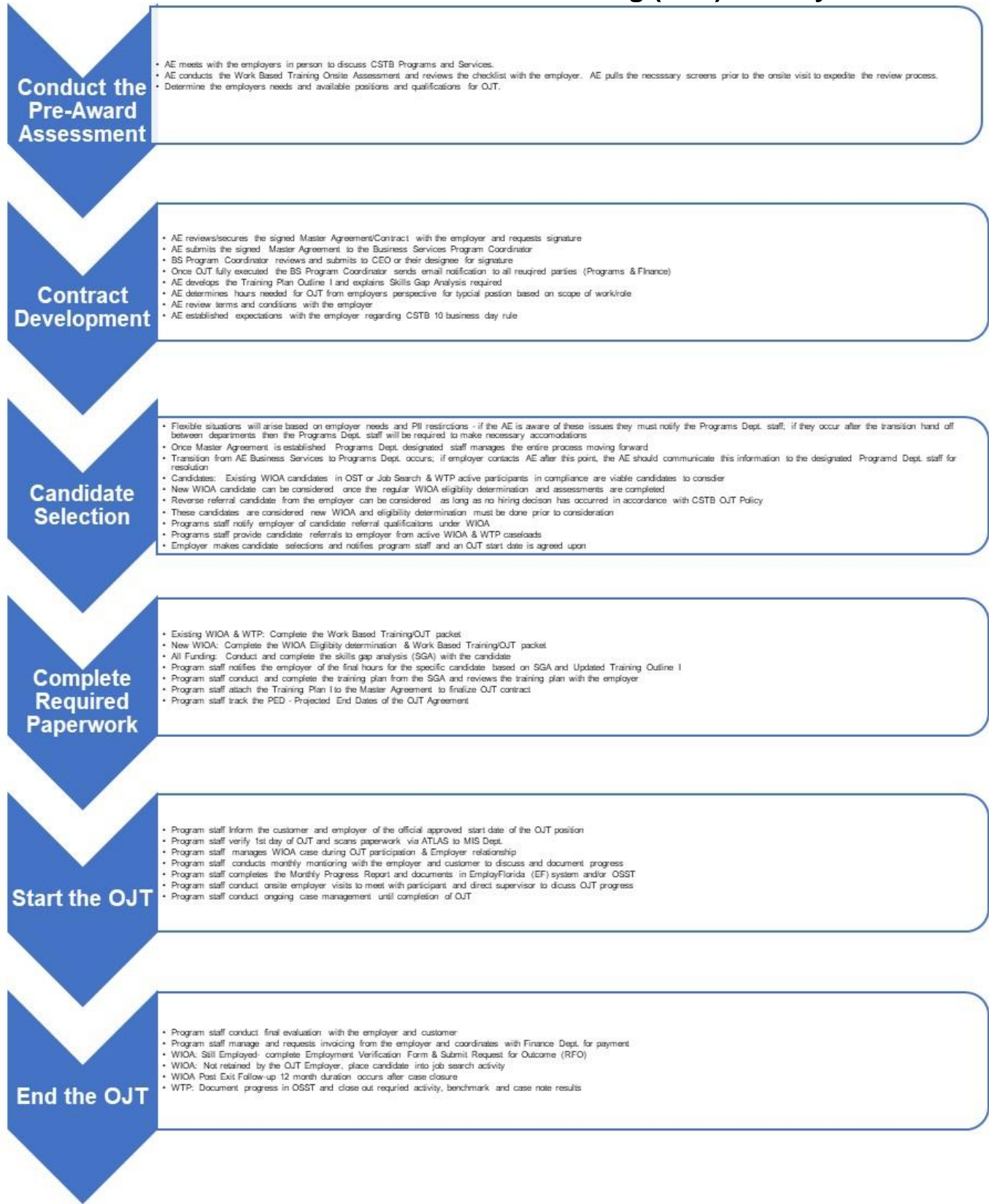
1. Paystubs showing pay period dates, pay date, type of hours worked, rate of pay, deductions, etc.
2. Timesheet Detail for only the FIRST and LAST week worked of the OJT/PWE Training Period.
3. W9 Form for employers receiving OJT Reimbursement.

Once the initial review is done by Programming staff, the Programming staff will sign off on Attachment II and forward to [OJTinvoice@careersourcetampabay.com](mailto:OJTinvoice@careersourcetampabay.com) along with the supporting documents outlined above. If Finance staff make a change for any reason to the reimbursement amount, an email notification of said change will be sent to Programming staff. Once the information/change is agreed upon between Finance and Programming staff, an encumbrance will be created and payment will be processed through the standard check run.

## **Reference Materials**

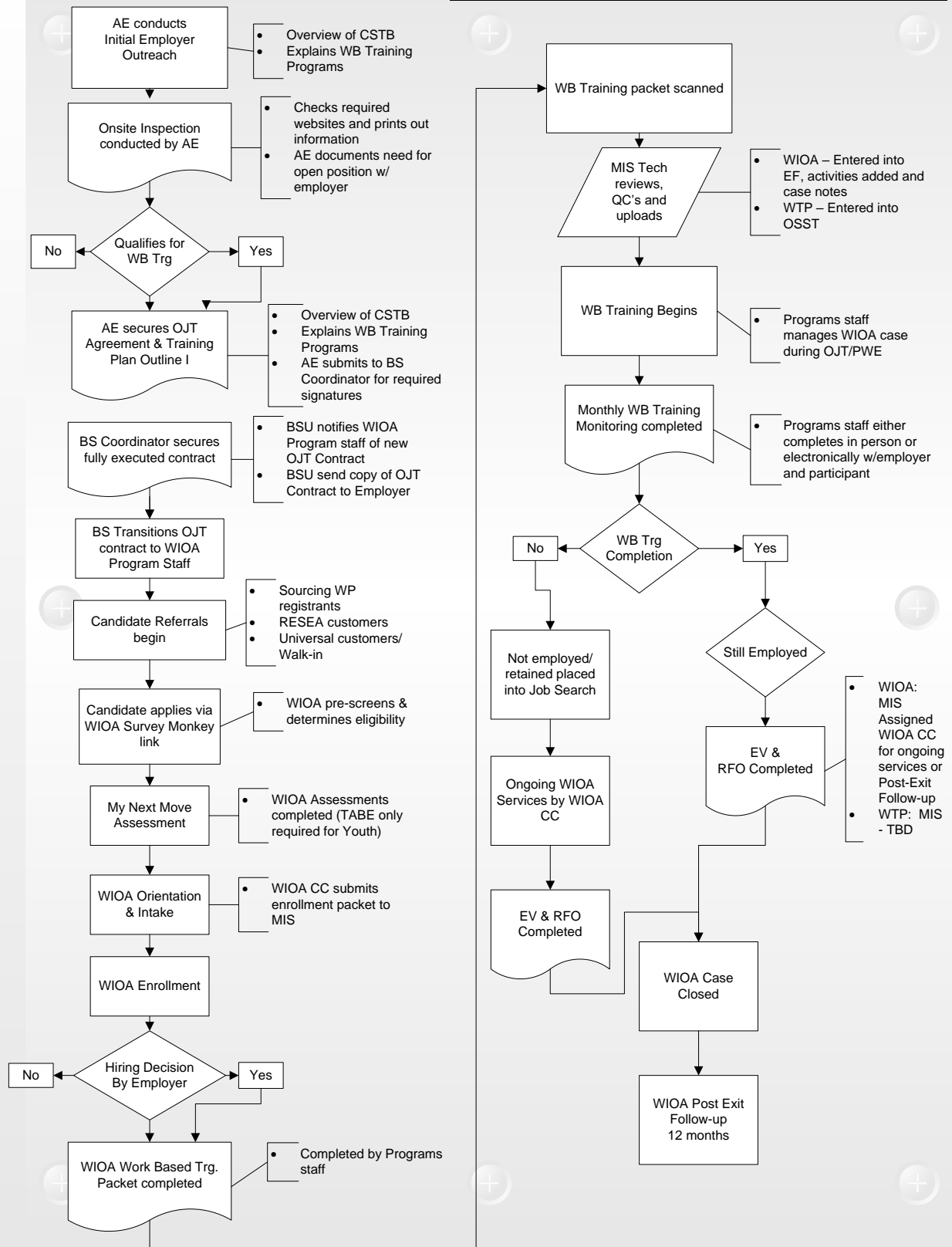
On the pages below you will find three flowcharts that outline the OJT process for your review.

# WIOA AD/DW & WTP Programs On-The-Job Training (OJT) Activity Flowchart

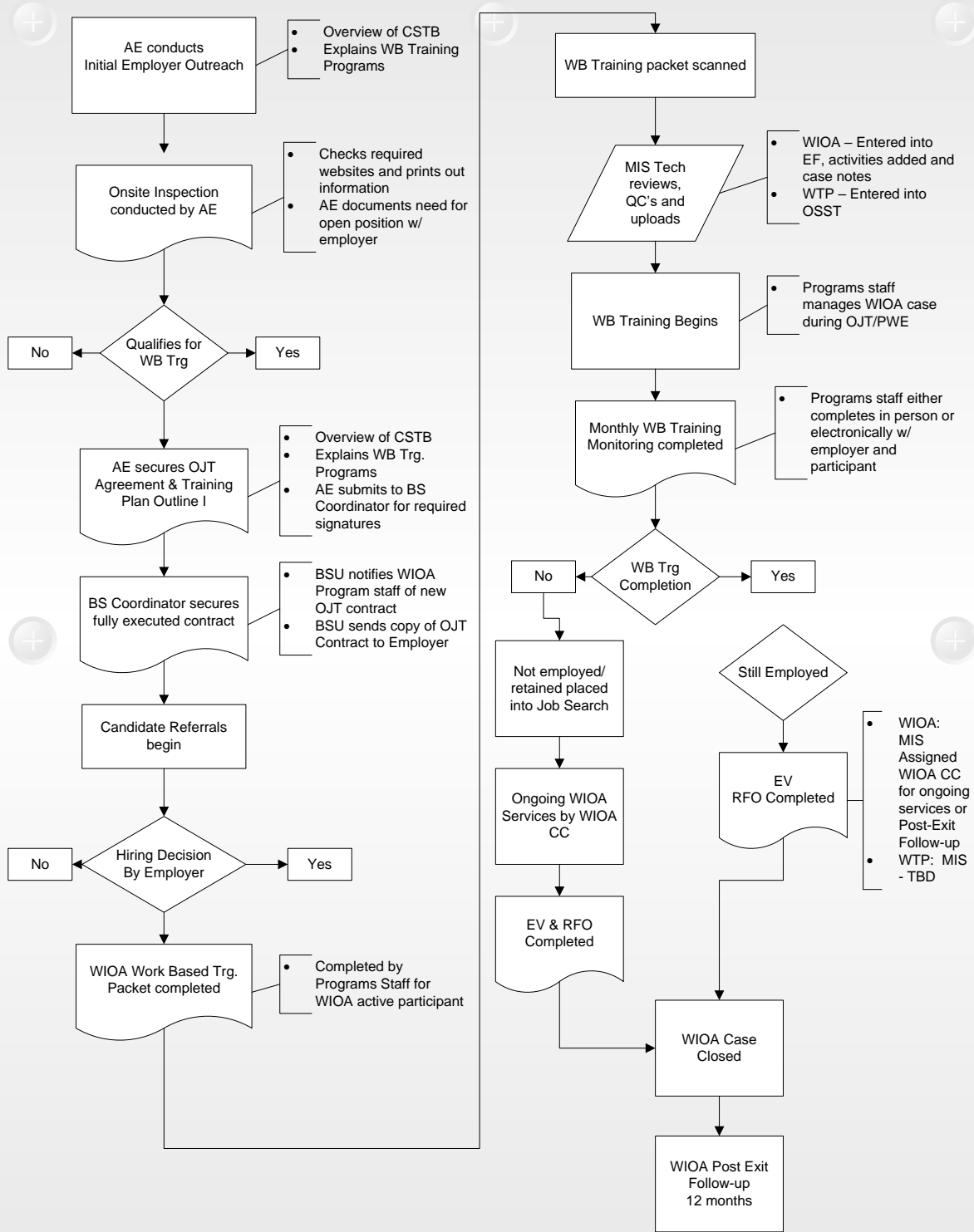


Flow charts

**CSTB OJT Process: New WIOA Referral Rev. 4.27.19**



### CSTB OJT Process: Existing WIOA Participants 4.27.19



**References:**

O*NET OnLine	<a href="https://www.onetonline.org/find/">https://www.onetonline.org/find/</a>
DOT Occupational Info	<a href="https://occupationalinfo.org/appendxc_1.html">https://occupationalinfo.org/appendxc_1.html</a>
My Next Move	<a href="https://www.mynextmove.org/">https://www.mynextmove.org/</a>
USDOL OJT Toolkit – Workforce GPS	<a href="https://ion.workforcegps.org/resources/2017/12/11/09/55/On-The-Job-Training-Policy-and-Procedures">https://ion.workforcegps.org/resources/2017/12/11/09/55/On-The-Job-Training-Policy-and-Procedures</a>
DEO Warn Notice	<a href="http://www.floridajobs.org/office-directory/division-of-workforce-services/workforce-programs/reemployment-and-emergency-assistance-coordination-team-react/warn-notices">http://www.floridajobs.org/office-directory/division-of-workforce-services/workforce-programs/reemployment-and-emergency-assistance-coordination-team-react/warn-notices</a>
R15 TOL	<a href="http://www.careersourcetampabay.com/files/public/TOL/Copy%20of%20PY%2018%2019%20CSTB%20TOL.pdf">http://www.careersourcetampabay.com/files/public/TOL/Copy%20of%20PY%2018%2019%20CSTB%20TOL.pdf</a>

**INQUIRIES:** Any questions about this procedure guide should be directed to the Chief Operating Officer (COO), Director of Business Services or the Programs Director.