



On-the-Job Training (OJT) Account Procedure

FIRST STEP: THE MASTER AGREEMENT

WORK WITH THE EMPLOYER

1. Review the OJT policies
2. Explain the procedures
3. Explain that the job must be permanent and full time
4. Ensure that the employer meets all eligibility requirements:
 - a. Refer to 20 CFR 663.700
 - b. Confirm that the employer has not been disbarred by checking the “Excluded Parties List System” at www.epls.gov.
5. Complete *Employer Information Worksheet*, *Union Concurrence* and the *Master Agreement*. Prepare three originals for signature (one each for Oakland PIC, WIB, and Employer) and more originals if requested by the WIB.
6. Attach the employer’s general liability and workers compensation insurance documents to the master agreement.
7. Tour the workplace and confirm how long the business has been at this location. If less than 120 days, ask for their prior location.
 - a. Refer to 20 CFR 667.268
7. Get a copy of the job description. The job description can be provided at a later time when the referral document is prepared.
8. Be clear that the new employee must qualify and be enrolled in WIA before they can begin the OJT. The JTA system will be checked before processing the OJT request.
9. Mail Originals to the attention of the Contracts Specialist at the Oakland PIC.
10. The Contracts Specialist Receives Originals and forwards to the department Director for signature.
11. The Contracts Specialist mails one original Master Agreement to the employer and one original to the WIB’s designated Referring Counselor.

12. Note that the master agreement has a term of one year.

SECOND STEP: THE REFERRAL

WORK WITH THE JOB SEEKER

1. Referring Counselor conducts transferable skills analysis and in-depth assessment, and records this in the IEP (Individual Employment Plan).
2. Referring Counselor ensures that all information is entered into Virtual One Stop (VOS) software
3. Referring Counselor determines, with job seeker client, if On-the-Job (OJT) training option is appropriate.
4. Referring Counselor verifies with their supervisor that Workforce Investment Act (WIA) funding is available for intended OJT. This verification is in accordance with local WIB procedures.
5. Funds must be reserved in *Checkbook*.
6. Referring Counselor verifies that job seeker client meets employer requirements for OJT.
7. Referring Counselor submits job seeker client's resume to Employer Liaison to determine match with employer job order.
8. Referring Counselor submits resume to employer for prescreening approval.
9. Referring Counselor ensures that the *Master Agreement* has not expired and is on file at the Oakland PIC, the WIB and with the employer.
10. Referring Counselor assists employer in preparing the *OJT Referral Forms*. Use **the most current version** provided by Oakland PIC and available at www.oaklandpic.org, or www.acwib.org. Information is typed into the document and saved to the Referring Counselor's computer or network. Do not submit hand written forms
13. Referral forms require the signatures of the: Referring Counselor, Counselor Manager, and Employer.
11. Referring Counselor mails completed and signed *OJT Referral Forms* to Oakland PIC Contracts Specialist. **Allow at least 15 business days for the PIC to process the OJT.**
12. Contracts Specialist enters information into *Tracking System*.

13. Contracts Specialist receives two originals of the *OJT Referral Form*, and forwards them to the department director for signature.
14. Contracts Specialist mails one signed original of the Referral Form to the employer and a copy to the referring counselor.
15. Job seeker client may now begin OJT.
16. Contract specialist generates the OJT invoices. The first invoice is emailed to the referring counselor to be used as a reference and as confirmation that the invoices have been prepared and mailed to the employer.
17. Employer forwards the prepared and signed invoice that covers the period of training received to date to the referring counselor. Referring counseling will ensure that all signatures are in place.
18. Referring Counselor verifies time sheets, payroll records, proficiencies, and a copy of any certificate earned, and signs invoice.
19. Referring Counselor sends invoice to supervisor, who signs off and mails to the Contracts Specialist who in turn forwards to the Oakland PIC Fiscal Department for payment.
20. Referring Counselor will monitor each OJT customer using the *OJT Monitoring Report*. These reports will be retained at the local WIB and a copy sent to the Contract Specialist.

NOTE: The longer the employer takes to sign and return documents, the longer it will take for the OJT client to start work.

Contracts Specialists – the people designated by the Oakland PIC to manage OJTs.

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