



ISTEP & OJT Services Procedure

Overview

This procedure explains how to:

- Correctly enter the Individualized Services Training and Employment Plan (ISTEP) and the On-the-Job Training (OJT) services for WIOA enrolled participants.
- Run an OJT Report
- Make/request corrections to OJT services.

For information on how to broker an On-the-Job Training agreement with an employer, please see <https://workforceboard.zendesk.com/hc/en-us/articles/4424187557261>.

To correctly enter the ISTEP and OJT services in Career Connect, staff should have a copy of the completed, signed OJT Agreement, including the ISTEP and the applicable Job Title Description(s).

ISTEP Service Entry

Before an ISTEP service can be entered Adult and Dislocated Worker Participants must have a 205-Development of an IEP service and Youth must have either the 469 or the 413-Develop Individual Service Strategy activity.


Add the ISTEP service once the employer selects a WIOA participant and the OJT Broker has completed and signed the ISTEP.

In Career Connect, assist the WIOA participant who is enrolling in an On-the-Job Training, and go to: *Staff Profile > Case Management Profile > Programs > WIOA > Activities/Enrollments/Services*

1. Click on *Create Activity/Service/Enrollment* link to enter the new service.
2. In the *General Information* section:
 - The *Customer Program Group* must match the OJT funding source (e.g Adult, Dislocated Worker, Youth, or in limited cases NDWG or Statewide Additional Rapid Response (1E)) from the ISTEP form.
 - The *Office Location* should be the **Office of the OJT Broker**. If this is a shared OJT, the Office Location for the ISTEP service will be different than the office the participant is case assigned to.

3. In the *Enrollment Information* section:

- For *Service Activity Level* select:
 - *Career Services* for Adult/DW
 - *Youth Services Elements: Education/Training/Career* for Youth.
- Click on the *Select Activity Code* link and select:
 - *221-Individualized Services & Training Plan (ISTEP) for OJT (Same Day Service)* for Adult/Dislocated Worker
 - *428-Individualized Services & Training Plan (ISTEP) for OJT (Same Day Service)* for Youth.
- **Both** the *Actual Begin Date* **and** the *Projected End Date* should match the *OJT Broker Management Signature Date* on the ISTEP form (see screen shot below.)

Chicago Cook Workforce Partnership On-the-Job Training (OJT) Employer Agreement LWIA 7 OJT Broker: North Suburban AJC Employer Agreement # 21-NSAJC-12345						
Sec. 3 Individualized Services Training and Employment Plan (ISTEP)				ONET Code:	514121 JC	
OJT Broker Information					Em	
Name	North Suburban AJC			Name	Acme Anvil	
Address	12345 N Main St, Wheeling, IL 60089			Address	5600 W Willow Rd, Schaumburg, IL 60195	
Phone	(847) 555-7979			Phone	(847) 555-1212	
Fax				Fax		
E-mail	deb@bcs.org			E-mail	weccoyote@acme.com	
Signatures:	BEFORE training BEGINS		BEFORE training BEGINS		BEFORE training BEGINS	
						
<i>OJT Broker Mgmt Signature</i>	2/1/2021	<i>OJT Broker Signature</i>	<i>Date</i>	<i>Trainee Signature</i>	<i>Date</i>	<i>Employer Signature</i>
Trainee Name	SSN (last four digits)	OJT Start Date	Planned End Date	Funding Source	Employment Goal	Reim %
Rene Reprocess	9999	02/02/22	04/15/22	DW	Welder	7

Enrollment Information


Grant:


WIOA or Non-WIOA Partner Program: Yes, service is a WIOA or Non-WIOA Partner Program.


*** Service Activity Level:**

*** Activity Code:**
[\[Select Activity Code \]](#)

*** An actual begin date or a projected begin date is required.**

Projected Begin Date: (mm/dd/yyyy)  [Today](#)

Actual Begin Date: (mm/dd/yyyy)  [Today](#)

*** Projected End Date:** (mm/dd/yyyy)  [Today](#)

Service Provided Virtual/Online:

4. Complete the *State Specific Information and Staff* sections of the screen and click *Next*.

5. Go to the *Enrollment Service Provider Information* section.
 - Select **OJT Broker** as the *Provider*.
 - For the *Service, Course or Contract* choose *Office Services*.
 - Select *Provider Locations* field with the appropriate **OJT Broker's** location.
Note: if this is a shared OJT, the Provider and Provider Location will be different than agency case managing the participant.
 - Select the applicable Relationship number. If no relationship number is available, please contact the Career Connect Help Desk and include the participant's name, Career Connect state ID #, the service code, and the OJT Broker's/Provider's information.
 - Scroll down and click *Next*.

Enrollment Summary:

Enrollment ID: 281483
 Username: RREPROCESS01
 WIOA Application ID: 317401
 Activity Code: 221 - Individualized Services & Training Plan (ISTEP) for OJT ...
 Activity Dates: 2/1/2022 - 2/1/2022

*** Provider:**

Business And Career Services Inc.
[\[Select Provider \]](#)

*** Service, Course or Contract:**

Office Services
[\[Select Service, Course or Contract \]](#)

Provider Locations:

Business and Career Services Inc.
 723 W. Algonquin Road
 Arlington Heights, IL 60005
[\[Select Provider Locations \]](#)

Provider Contacts:

[\[Select Provider Contacts \]](#)

*** Occupational Training Code:**

Not Applicable

Relationship Number:

8593300 ▼

6. *Closure Information.*


- The ISTEP Service is a Same Day Service, which means it must be closed on the same day it is opened. Enter the *OJT Broker Management Signature Date* from the ISTEP as the *Last Activity Date*.
- Select *Successful* as the *Completion Code*.
- Go to the *Add a Case Note* link and add a case note with the subject *ISTEP for OJT* . In the description, summarize the skills gaps and hours of training from the ISTEP.
- *Save* the Case Note.
- Scroll down and click the *Finish* button to save the ISTEP service activity.

Closure Information

Enrollment Summary:

Enrollment ID: 281483
Username: RREPROCESS01
WIOA Application ID: 317401
Activity Code: 221 - Individualized Services & Training Plan (ISTEP) for OJT ...
Activity Dates: 2/1/2022 - 2/1/2022

Last Activity Date:

02/01/2022  [Today](#)

Completion Code:

Successful Completion ▼

Case Notes:

[[Add a new Case Note](#) | [Show Filter Criteria](#)]

ID	Create Date	
2857008	02/01/2022	ISTEP for OJT

  Page

UPDATED: The ISTEP Service displays as “Referred to Employment / Placement Assistance” in IWDS.

OJT Service Entry

Once the actual OJT start date occurs, staff can enter the OJT Service in Career Connect.

If the OJT is an Apprenticeship, add it in Career Connect as an Apprenticeship service (not an OJT service). See the Apprenticeship Service procedure for details (<https://workforceboard.zendesk.com/hc/en-us/articles/360050548012>).

1. Go to *Activities/Enrollments/Services* section and click on *Create Activity/Service/Enrollment* link to enter the OJT Service.
2. In the *General Information* section:
 - The Customer Program Group must match the OJT funding source from the ISTEP form (e.g. Adult, Dislocated Worker, Youth, or in limited cases NDWG or Statewide Additional Rapid Response (1E)).
 - The *Office Location* should be the **Office of the OJT Broker**. If this is a shared OJT, the Office Location for the OJT service will be different than the office the participant is case assigned to.
3. In the *Enrollment Information* section.
 - For *Service Activity Level* select:
 - *Training Services* for Adult/Dislocated Worker
 - *Youth Services Elements: Education/Training/Career* for Youth
 - Click the *Select Activity Code* link and select:
 - *301-Private Sector OJT* (for Adult/Dislocated Worker)
 - *443-WBL-On-the-Job Training (OJT) Private Sector OJT* (for Youth).
 - Or
 - 302 - Public Sector On-the-Job Training (OJT) (for Adult/Dislocated Worker)
 - 444 - WBL Public Sector On-the-Job Training (for Youth)

NOTE: If the OJT service is not available for selection there are two likely causes:

- The ISTEP service was not added.
- If the participant is an Adult or Dislocated Worker, they must be certified for training-level services on the State Specific tab of the WIOA application. (See section [C. Training Certification of the Adult/DW Basic Skills Assessment Procedure](#) for how to certify for OJT Training.)

4. The dates entered in Career Connect for *Actual Begin Date* and *Projected End Date* will match with the ISTEP's *OJT Start Date* and *Planned End Date*.

Trainee Name	SSN (last four digits)	OJT Start Date	Planned End Date	Funding Source	Employment Goal	Reimb. %	Hourly Wage	Potential Adj. Hrs. Reimbursement	OJT Wage (Hourly Wage * Rate)
Rene Reprocess	9999	02/02/22	04/15/22	DW	Welder	75%	\$ 19.75	\$2,962.00	\$14.81

Note: The OJT Start Date may be different then the hire date in cases when the OJT starts shortly after the first day of work. For example, this can happen when the OJT Trainee has an employee orientation during the first week and then starts OJT.

5. Set *Participant has been issued an ITA and the ITA will pay for this service* to No.

Enrollment Information

Grant:

WIOA or Non-WIOA Partner Program: Yes, service is a WIOA or Non-WIOA Partner Program.

*** Service Activity Level:**

*** Activity Code:**
[\[Select Activity Code \]](#)

* An actual begin date or a projected begin date is required.

Projected Begin Date: (mm/dd/yyyy) Today

Actual Begin Date: (mm/dd/yyyy) Today

*** Projected End Date:** (mm/dd/yyyy) Today

Service Provided Virtual/Online:

*** Participant has been issued an ITA and the ITA will pay for this service:**

6. Complete the rest of the screens under *State Specific Information* and *Staff* sections and click *Next*.

7. Go to the *Enrollment Service Provider Information* section.
 - Select the **OJT Broker** as the *Provider*.
 - For the *Service, Course or Contract* choose *OJT Services*.
 - Select the appropriate **OJT Broker's** location for *Provider Locations*.
Note: if this is a shared OJT, the Provider and Provider Location will be different than agency case managing the participant.
 - Click the *Occupational Training Code* link find and add the ONET code that is on the ISTEP.

Chicago Cook Workforce Partnership On-the-Job Training (OJT) Employer Agreement LWIA 7 OJT Broker: North Suburban AJC Employer Agreement # 21-NSAJC-12345		
Sec. 3 Individualized Services Training and Employment Plan (ISTEP)	ONET Code: 514121	JOB TITLE: Welder

- Click the *Industry Code (NAICS)* link to find and add the employer's industry. The NAICS can be found in *Section 2. Employer Information* of the OJT Agreement.

Section 2. Employer Information

EMPLOYER LEGAL BUSINESS NAME: Acme Anvil		FEIN #: 36-5554809
FORMER NAME(S) UNDER WHICH THE EMPLOYER CONDUCTED BUSINESS: (IF NONE, ENTER N/A) IF NONE, ENTER N/A		
EMPLOYER ADDRESS: 5600 W Willow Rd		
CITY: Schaumburg	STATE: IL	ZIP: 60058
CONTACT PERSON: Wile E Coyote		TITLE: Mastermind
TELEPHONE: (847) 555-1212	EMAIL: wecoyote@acme.com	FAX:
PAYROLL SYSTEM: ADP	LOCATION OF PAYROLL RECORDS: Office	# OF EMPLOYEES: 28
COMPANY INDUSTRY: Metals Manufacturing	NAICS CODE: 332322	YEARS IN EXISTENCE: 20
WORKMAN COMPENSATION CARRIER: State Farm	WORKMAN COMPENSATION POLICY #: 123080940	WORKMAN COMPENSATION POLICY DATES: 01/01/22 TO 01/01/24

- Select the applicable Relationship number. If no relationship number is available, please contact the Career Connect Help Desk and include the participant’s name, Career Connect state ID #, the service code, and the OJT Broker’s/Provider’s information.
- Scroll down and click *Next*.

*** Provider:**
[\[Select Provider \]](#)

*** Service, Course or Contract:**
[\[Select Service, Course or Contract \]](#)

Provider Locations:

[\[Select Provider Locations \]](#)

Provider Contacts:
[\[Select Provider Contacts \]](#)

*** Occupational Training Code:**
[\[Occupational Training Code \]](#)

*** Industry Code and Description:**
[\[Industry Code \(NAICS\) \]](#)

Relationship Number:

7. After clicking “next” you be redirected to a message at the top of the screen indicating that worksite information is required. Scroll down to complete the *Worksite Information* section.
 - Enter the worksite name, address, and contact information based on *Section 2. Employer Information* of the OJT Agreement (see screen shot above).
 - Use the applicable Job Title Description from the OJT Agreement for:
 - *Hourly Wage:* enter the *Hourly Wage*, the full (non-subsidized) wage amount
 - *Weekly Hours:* enter the *Weekly Hours for Position*

NOTE: wages and hours entered on this screen are informational only. The actual OJT wages will be calculated on the next screen.
 - Click *Next*.

Chicago Cook Workforce Partnership
 On-the-Job Training (OJT) Employer Agreement
 LWIA 7 OJT Broker: North Suburban AJC
 Employer Agreement # 21-NSAJC-12345

Section 1: Job Title Description

JOB TITLE #1: Welder	O*NET SOC CODE: 514121
BRIEF JOB DESCRIPTION: Welding	
MINIMUM JOB/EDUCATION REQUIREMENTS: HS diploma, 10th grade math	
LIST TOOLS OR EQUIPMENT NEEDED TO COMPLETE TRAINING: Steel-toed boots	
WEEKLY HOURS FOR POSITION: 38	
HOURLY WAGE: \$19.75	
REIMBURSEMENT RATE FOR POSITION (%): 75%	
REIMBURSEMENT WAGE FOR THIS POSITION: \$14.81	
TOTAL TRAINING HOURS REQUIRED FOR THIS POSITION: (ATTACH EMPLOYER'S JOB DESCRIPTION AND TRAINEE'S RESUME AF 300	
POTENTIAL REIMBURSEMENT FOR ONE POSITION: (MAXIMUM IS \$10,000) \$4,443.00	
NUMBER OF TRAINEES REQUESTED: 1	
POTENTIAL REIMBURSEMENT FOR ALL POSITIONS: \$4,443.00	

* Worksite Name:	<input type="text" value="Acme Anvil"/>
* Address:	<input type="text" value="5600 Willow Rd"/>
Address	<input type="text"/>
* City:	<input type="text" value="Schaumburg"/>
* State:	<input type="text" value="Illinois"/>
* Zip Code:	<input type="text" value="60058"/>
* Contact Name:	<input type="text" value="Wile E. Coyote"/>
* Phone Number:	<input type="text" value="847"/> - <input type="text" value="555"/> - <input type="text" value="1212"/> Ext <input type="text"/>
E-mail Address:	<input type="text" value="wecoyote@acme.com"/>
Hourly Wage:	<input type="text" value="\$ 19.75"/>
	<small>Note: This field is for record-keeping purposes only. Program costs are derived from the service.</small>
* Weekly Hours:	<input type="text" value="38"/> Example: 99.9

Note: Staff must also enter the OJT Job in the WIOA Employment bar to track it as a placement.

8. For OJTs, staff must update the **Enrollment Cost Information** based on the ISTEP as described and shown in the example below. Use the applicable *Job Title Description* from the OJT Agreement.
- *Wage*: use the *Hourly Wage* (This is the full, **unsubsidized** hourly wage).
 - Leave *Wage Type* set to *Hourly*.
 - *Duration*: use the *Total Adjusted Hours* from the ISTEP form.
 - *Wage Reimbursement Rate*: use the *Reimb. %* from the ISTEP and make sure that the *Applicable* check box is checked.
 - Career Connect will automatically calculate and update the *Total OJT Wage Costs*. This should match the *Potential Adj. Hrs. Reimbursement* from the ISEP. (Note that it is okay if this amount is off by a dollar or two due to rounding.)
 - Once you verify that the total updated correctly, click *Next*.

Trainee Name	SSN <small>(last four digits)</small>	OJT Start Date	Planned End Date	Funding Source	Employment Goal	Reimb. %	Hourly Wage	Potential Adj. Hrs. Reimbursement	OJT Wage <small>(Hourly Wage * Rate)</small>
Rene Reprocess	9999	02/02/22	04/15/22	DW	Welder	75%	\$ 19.75	\$2,962.00	\$14.81
MAXIMUM REIMBURSEMENT NOT TO EXCEED \$10,000 PER ISTEP (OJT WAGE X TOTAL ISTEP HOURS) Rev. 5/13/2021									
Skills to be Acquired	Existing Skills	Planned Hours	Adjusted Hours	Performance Indicator	Assessment Method	Skill Attained? (Y or N)			
1 Welding		150	100	ability to weld to set standards	supervisor review				
2 Soddering		150	100	ability to sodder to set standards	supervisor review				
Total Hours		300	200	AFTER training is COMPLETED: For EACH SKILL LISTED - Separately assess the trainee's attainment of THAT skill For EACH PAGE of the ISTEP - Trainer must SIGN & DATE EACH page of the ISTEP					

301 - On-The-Job Training (OJT) - Private Sector
Business And Career Services Inc.
On-the-Job Training

Enrollment Summary: Enrollment ID: 281484
Username: RREPROCESS01
WIOA Application ID: 317401
Activity Code: 301 - On-The-Job Training (OJT) - Private Sector
Activity Dates: 2/2/2022 - 2/2/2022

\$ 2,962.50 Total costs are itemized below:

Total OJT Wage Costs

\$ 2,962.50

Available: \$4,442.75
Obligated: \$0.00

Wage

\$ 19.75

Wage Type

Hourly

Duration

200.000

Available: 300.000
Obligated: 0.000

Wage Reimburse Rate

75

Applicable

9. Skip through *Financial Aid, Enrollment Budget, and Budget Planning* sections by clicking *Next*.

10. Go to the *Closure Information* section **to add a Case Note**.

- Click *Add a new Case Note* link.
- The case note subject should be *OJT Training*
- The case note description should include the employer's name, position to be trained in, training components, training start date, and planned end date. Note next steps for coach to check-in with the participant.
- Do not close the OJT Service at this time; scroll down and click *Finish*.
- Email the ISTEP document to The Partnership at ExceOJT_ISTEP@chicookworks.org.

Closure Information

Enrollment Summary: Enrollment ID: 281484
Username: RREPROCESS01
WIOA Application ID: 317401
Activity Code: 301 - On-The-Job Training (OJT) - Private Sector
Activity Dates: 2/1/2022 - 4/15/2022

Last Activity Date:  [Today](#)

Completion Code:

Case Notes: [[Add a new Case Note](#) [Show Filter Criteria](#)]

ID	Create Date	Subject
2857009	02/02/2022	OJT Training

Page 1 of 1

Reminder: Weekly and/or monthly case notes must be entered to show follow up on customer's progress with OJT and should address issues throughout the training period.

OJT Service Close-Out

Close the OJT service **as soon as** the OJT is completed, either because the participant completed the full OJT or because the participant dropped.

1. Go to the *WIOA Activities/Enrollments/Services* section and click on the *Close* link to enter the actual end date of the OJT as noted by the OJT Employer.

Search:

PE	EE	Status	Activity / Provider	Actions	Funding / Grant	Projected Begin Date	Actual Begin Date	Projected End Date	Actu
			301 - On-The-Job Training (OJT) - Private Sector Business And Career Services Inc.		Dislocated Worker	N/A	02/02/2022	04/15/2022	Close

2. On the *Closure Information* screen:
 - Enter the OJT service end date in the *Last Activity Date* field. This date must reflect the actual date the OJT was completed or terminated as per the OJT Employer.
 - For *Completion Code*:
 - Select *Successful* if the participant successfully completed the OJT.
 - Select *Unsuccessful* if the OJT was terminated for any reason.
 - For Youth, complete the school status on the last day of activity information.
 - Enter a case note detailing the completion or termination of the OJT, whether a measurable skills gain was obtained, and whether the participant is continuing in unsubsidized employment with the OJT employer.
 - Email the final ISTEP document to The Partnership at ExceOJT_ISTEP@chicookworks.org.

Closure Information

Enrollment Summary: Enrollment ID: 281484
Username: RREPROCESS01
WIOA Application ID: 317401
Activity Code: 301 - On-The-Job Training (OJT) - Private Sector
Activity Dates: 2/2/2022 - 4/15/2022

Last Activity Date: 02/02/2022  Today

Completion Code: Unsuccessful Completion ▾

Case Notes: [[Add a new Case Note](#) | [Show Filter Criteria](#)]

ID	Create Date	
2857010	02/02/2022	Unsuccessful OJT
2857009	02/02/2022	OJT Training

Page

NOTE: All Adult and Dislocated Worker OJT participants are in the Measurable Skills Gain (MSG) performance measure for each program year that they are in the OJT. Make sure to record any skills gains during the OJT in accordance with the MSG procedure:

<https://workforceboard.zendesk.com/hc/en-us/articles/360003921472>

UPDATED: OJT is considered a work-based learning activity for Youth (not training). Therefore, OJTs do not put Youth in the MSG performance measure. However, if a Youth participating in an OJT is in the MSG due to another service, skills gains earned through the OJT may be used to meet the MSG performance requirement.

OJT Report

Most of the information entered with the OJT service will display in the OJT Payment report described below. Staff can run this report to ensure that all their OJT data is entered into Career Connect correctly by the 10th of the month, which is when The Partnership will pull its monthly OJT data.

Note that The Partnership OJT report is based on the Program Year (July 1-June 30), which may be different from your agency's contract period.

Report Path: *Detailed Reports > Case Management Reports > Case Load > OJT/Work Experience > On the Job Training*

Filter Instructions:

- *Program:* Title 1 – WIOA
- *Customer Group:* Select as needed or leave as *None Selected* to return all customer groups
- *Region/LWDB:* Chicago Cook Workforce Partnership
- *Office Location:* Use the CTRL key to select multiple offices if applicable.
 - The report will return OJTs for the office that the ***OJT service*** is attached to, which should be the OJT brokering office.
 - The report results include an *Office of Responsibility* column, which is the office that enrolled the participant in WIOA and is providing career coaching services.
 - Note the report does **not** include a column for the OJT brokering office, but that displays in the report filter information at the top.
- *Filter by Date:* Select as applicable. The options below will likely be the most useful:
 - *Actual Begin Date:* will return any OJT services with a start date in the selected date range
 - *Actual End Date:* will return closed OJT services with an end date in the selected date range
 - *Active Service:* will return any OJT services that were open during the selected date range. This will include both open and closed services. This is the best option to see all your OJTs in a given period (such as the program year).
 - *Create Date:* will return any OJT services that were entered into Career Connect during the selected date range. This is a good option to see any newly entered OJTs (regardless of the OJT start or end date).
- *Date Range:* Select your desired date range.
- Click *Run*

The report will include the columns show below. (Some cells have been shaded to hide personally identifying information.)

User ID	State Id	Name	App ID	Service Code	Proj. Begin Date	Act. Begin Date	Proj. End Date	Act. End Date	Completion Status	Provider
				501	10/11/2021	10/11/2021	11/19/2021	11/30/2021	Successful Completion	Ywca Harris Center
Total: 1										

Program O*NET	Worksite Name	Worksite Location	Worksite Contact	Worksite Hourly Wage	Worksite Weekly Hours	OJT Wage Cost	OJT Wage	Duration	Wage Reimb. Rate
53303200-Heavy and Tractor-Trailer Truck Drivers	Green Grease Environmental			\$18.00	40	\$2,000.00	10	400	50%
						2000			

Exit Date	Assigned Staff	Customer Group	Office of Responsibility
12/10/2021		Adult	South Suburban Cook AJC at Prairie State College (7710)

For general instructions on how to save commonly run reports to “My Reports” see the Reports Overview on the Help Desk: <https://workforceboard.zendesk.com/hc/en-us/articles/6503046470541>

Editing OJT Services

If, after running the report, staff find errors with the *Projected End Date* or the OJT Cost information, staff can update this information **if the service is open**.

If the service is closed, or if there are other errors that need to be corrected, please submit a request to the Help Desk and include, the participant's name, state ID #, and the specific edits needed.

If the *Customer Group*, the *Provider*, or the *Provider Location* need correcting, staff must re-enter the service and submit a Help Desk request to have the original OJT service voided.