

# Ohio Incumbent Workforce Voucher Training Program

## Instructions for Completing the On-line Application

### **Registration**

First time users: click [Register](#).

From the drop down menu, register as an employer or individual. Please note that if you are applying as an individual you will need pre-approval from your employer.

**User Name:** This cannot contain spaces or punctuation.

**Email Address:** This should be an address in which the person submitting the application may be notified.

**Password:** Enter and confirm password. ***Password is case sensitive.***

Click "Create User". You will then be directed to a series of tabs that will allow you to proceed with the application process.

### **Training Justification**

Choose at least one of the options provided. Please note that you must provide a written explanation as to why you chose the option(s).

Click the "Save" button.

### **Company Information**

Complete all required (\*) fields. Request cannot be submitted until all required fields are completed on all tabs.

**Full Legal Company Name:** Use legal company name as it should appear on your Ohio Incumbent Workforce Voucher Training Program Voucher Agreement. Please note that this must match the way the company is registered with the IRS and the Ohio Secretary of State's office.

**Address:** The person completing the application must enter their work site address.

**NAICS Code:** Enter the company's main North American Industrial Classification System (NAICS) Code. <http://www.naics.com/search.htm>

**Federal Tax ID:** Enter the company's Federal Tax ID number. This is a unique nine-digit number that will be used to track the company's maximum allowable training cost. *If this field is not completed, you will not be permitted to move onto the Employee tab and complete the application.*

**Company's Industry:** From the drop down menu, choose the company's industry type. Please note that the State of Ohio along with JobsOhio is specifically focused on industries where Ohio is strongest and that drive the state's overall economy.

**Description of business products/services:** Describe what product or service your company provides.

**Date of establishment in Ohio:** This is the year that the company began business in the State of Ohio.

**Number of Employees in Ohio:** This is the total number of permanent employees at all company facilities within the state of Ohio.

**Has the company been in continuous operation in the state of Ohio during the 12-month period preceding the date of this application:** Select "yes" or "no". Continuous operation during the previous 12-month period is a requirement of the program. Therefore, if you have selected "no" do not go any further, as your application will be denied.

**Project Location:** Select "yes" or "no" to indicate if this application includes more than one project location. If you select "yes", move forward to the Company Contact Information. If you select "no", either click the "Project Location same as above" button or enter the project location address.

**Company Contact Information:** This is the person that the state of Ohio can contact regarding this training application.

Click the "Save" button.

## **Employees**

Complete all required (\*) fields. Request cannot be submitted until all required fields are completed on all tabs.

For Individuals: Enter your information and click the "Save" button. Please note that you must enter the last four digits of your SSN and your date of birth in order to move on to the Training tab and complete the application.

For Employers: Enter the information for each employee that you want to include in the application making sure to use each individual employee's work site address (this is the address where the individual employee works). As you click the "Save" button, the employee's name appears in the list below the entry fields. To edit a previously entered employee, click the edit link to the left of the

employee's name. Please note that you must enter the last four digits of the SSN and the date of birth for each employee in order to move onto the Training tab and complete the application.

**Current Hourly Wage Rate:** This wage must be at least \$10.88 an hour **before** benefits. If an individual's hourly rate is less than \$10.88 (do not include benefits in this number) you will not be permitted to save their information in the application.

Click the "Save" button.

To remove/delete an employee, click the waste basket icon.

Repeat the above steps to add additional employees.

## **Training**

Please note that **training will only be considered if submitted at least 30 days prior to the start date** of training to allow time for the Ohio Development Services Agency to review and process. Training started or paid for before the company has received a fully executed Voucher Agreement or Supplement to the Master Voucher Agreement may not be reimbursed.

**Training must begin within 180 days (six months) from the application submission date or June 30, 2013, whichever date is first. Training must be completed by June 30, 2013.**

Under "Add New Course", enter the information for the Training Provider, Course Information, Training Costs, and Training Outcomes.

**Training Costs:** At least one of the boxes (Instructor Fee, Tuition, or Materials) must have a dollar amount. Click "Calculate Totals" and the system will calculate the Reimbursable Amount and Non-Reimbursed Amount. Please note **that all costs should be per employee and should not include wages of the trainee or any travel costs.**

**Instructor Fee** – This is for an in-house instructor that is employed by the company. This is calculated by using the in-house instructor's hourly wage plus benefits multiplied by the number of hours he or she is training the employee. Please note that if the in-house instructor is training more than one employee at a time that his or her fee must be prorated by the number of employees being trained in order to obtain the instructor fee **per employee**.

**Tuition** – Includes costs that a public or private vendor/trainer charges **per employee** to conduct training.

**Materials** – Can include costs for manuals, text books, and handouts/duplicated materials (calculated at \$.05 per copy). Please note that these costs must be prorated per employee and will be capped at 10 percent of the cost of training per employee per training.

Click the “Save” button. The course title will now appear in the box below the entry fields. To assign employees to that particular training, click the “select” link to the left of the course title. Scroll down until you see your list of employees. Highlight each person that will be assigned to that training course and then click on the “add >” button. A message will then appear next to the list of employees confirming that the employees were assigned to the training and indicating if the full reimbursement amount was made or whether it was reduced according to the amount available for the employee (\$4,000 per person) or the company (\$500,000 per Federal Tax ID #)

To remove an employee, highlight their name and click the “< remove” button.

To add additional courses, scroll to the top of the screen and click the “Add new course” tab.

To edit any of the courses, click the “select” link to the left of the course title, remembering to hit the “Save” button upon completion.

To delete a course, click the “select” link to the left of the course title and then click the “Delete” button. Please note that you may need to select the “refresh” button in the upper right-hand corner of the box.

### **Training Summary**

The Training Summary lists all of the individual employees matched with training course titles that were submitted under the “Training” tab as well as total costs and the total reimbursable amounts eligible under the program.

If a course title(s) does not appear in your Training Summary, please review/edit the course on the training tab to ensure that you have added employees to the course. At least one employee must be added to the course before that course will appear in the Training Summary.

To complete the Training Summary, you must click the Edit Outcomes link to the left of the employee’s name. Choose the “Training Outcome” from the drop down menu being sure to hit “update” before moving to the next employee. Please note that if you have assigned an employee to more than one course, you will have to repeat this process for each course they are assigned.

For your convenience, a button allowing you to export the Training Summary to a Microsoft Excel spreadsheet has been placed at the bottom of the screen.

### **Required Forms**

Under this tab, you will see a list of forms that you must download and complete as part of your application. **Please note that a company official (CEO, HR Manager, Training Manager, etc.) must sign the forms.** If you are applying as an individual, you cannot sign the forms, even if you are a company official.

The forms can be scanned and emailed to [IncumbentWorkforce@development.ohio.gov](mailto:IncumbentWorkforce@development.ohio.gov) or mailed to:

Ohio Development Services Agency  
Office of Strategic Business Investments  
Ohio Incumbent Workforce Training Voucher Program  
77 South High Street, 28<sup>th</sup> Floor  
Columbus, OH 43215-1001

**The completed, signed forms must be received by the Ohio Development Services Agency within five business days of your application submission. Please note that a Voucher Agreement will not be drafted until these forms are received.**

A company official will formally submit the application by clicking on the six checkboxes, confirming that they have reviewed and accepted the Terms and Conditions, the Liabilities, the Disclaimer, the Confidentiality Statement, the Incurring Costs Prior to Written Agreement statement, and the Certification. The final step is to click the "Submit" button. Please note, that once the application has been submitted, you will still be able to view the application but you will no longer be able to make changes to it.

Once the application has been submitted, program staff will review your application. If approved, you will receive an Email with the details. If denied, you will be contacted and given an opportunity to correct the application if applicable.

Please note that **training will only be considered if submitted at least 30 days prior to the start date** of training to allow time for the Ohio Development Services Agency to review and process. Training started or paid for before the company has received a fully executed Voucher Agreement or Supplement to the Master Voucher Agreement may not be reimbursed.

**Training must begin within 180 days (six months) from the application submission date or June 30, 2013, whichever date is first. Training must be completed by June 30, 2013.**

### **Employee/Training List**

This tab will not appear until after the application has been reviewed and approved by program staff.

The Employee/Training List is one of the documents the company will use to request reimbursement once a training course has been completed.

Scroll down until you find the individual and corresponding course title. Click the pencil icon to the left of the employee's name. Enter the actual amount of reimbursement that you are requesting and then click "update".

Once you have entered all of the dollar amounts for this reimbursement request, click "Send Payment Request". You will receive an Email summarizing the information you entered. Please print this Email and submit along with your Invoice and supporting documentation to Ohio Shared Services. To review the Process for Submitting a Reimbursement, visit

[http://www.development.ohio.gov/bs/bs\\_wtvp.htm](http://www.development.ohio.gov/bs/bs_wtvp.htm)