Ohio Incumbent Workforce Training Voucher Program

Instructions for Completing the On-line Application

Pre-application instructions for September 4 – 29, 2013 are listed below. Please be advised that additional information will be required on September 30, 2013 in order to submit your application.

Registration

First-time users: click Register.

Username: 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.

Existing User:

You may log into the FY'14 application with your Username and password from FY'13.

If you have forgotten your password, you can click on the "forgot password" option on the registration page and the system will email you a new password. Please note that this password will be sent to the email address of the person that registered your company last year.

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 Training Voucher Program Agreement. Please note that this must match the way the company is registered with the Ohio Secretary of State's office. (http://www2.sos.state.oh.us/pls/bsqry/f?p=100:1:0).

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.*

Address: Enter the address as it should appear on your Ohio Incumbent Workforce Training Voucher Program Agreement.

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

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.

State of Corporation: This is the State in which your business has been incorporated. Please note that this must match the way the company is registered with the Ohio Secretary of State's office

For-Profit: Select "yes" or "no".

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

Number of Full-Time 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 name that will appear on your Ohio Incumbent Workforce Training Voucher Program Agreement.

Person Completing Application in different than Company Contact: This is the name of the person completing the application and who 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.

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

While the Effective Date of the Agreement will be August 1, 2013, any costs incurred or monies expended by the Applicant on the Project prior to final approval and the execution of the written Agreement, is done at the Applicant's own risk. Applicant's decision to go forward does not obligate the state of Ohio to provide state assistance that has not received all required approvals or has not been memorialized in a written Agreement between the Applicant and the state of Ohio.

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

Course Description: To avoid delay in the approval process, the course description must be detailed (no acronyms) and not a repeat of the course title.

Training Costs: Enter the instructor fee or tuition cost and material costs if applicable (**please note that materials are capped at 25 percent of training costs**). 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 (i.e, hotel, mileage, per diem).**

> **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 – Please note that these costs must be prorated per employee and will be capped at 25 percent of the cost of training per employee per training. Must be requested and approved in the application to be eligible.

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 ($250,000 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 eligible costs and the approved 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.

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

The following forms are **required** and must be completed, signed and uploaded before you will be permitted to submit your application.

Please ensure that you are using the company's full legal name as registered with the Ohio Secretary of State's Office (http://www2.sos.state.oh.us/pls/bsqry/f?p=100:1:0). Please be sure that the company name is identical including the capitalization, punctuation and spacing. The company's legal name, address and Federal Employee Identification Number must be identical on each of the forms or they will be denied.

1. **Vendor Information Form** (Rev. 11/1/2011) – Please complete all applicable sections of this form. The information you provide must match how you are registered with the Ohio Secretary of State's Office.

2. **W-9 Request for Taxpayer Identification Number and Certification** (Revision 8/2013) – Please complete all applicable sections of this form. The information you provide must match how you are registered with the Ohio Secretary of State's Office.

3. **Authorization Agreement for Direct Deposit of EFT (Electronic Funds Transfer) Payments** (REV. 07/08/2013) – Please complete all applicable sections of this form. Please note that a voided check or a bank letter signed by a bank representative is also required to ensure proper processing of the request.

4. **Authorization to Release Tax Information Form –** Complete all applicable sections of the form. The information you provide must match how you are registered with the Ohio Secretary of State's Office.

Note: Please ensure that you are using the company's full legal name as registered with the Ohio Secretary of State's Office (http://www2.sos.state.oh.us/pls/bsqry/f?p=100:1:0). Please be sure that the company name is identical including the capitalization, punctuation, and spacing. The company's legal name, address and Federal Employee Identification Number must be identical on each of the forms or they will be denied.

Please note that a company official (CEO, HR Manager, Training Manager, etc.) must sign the forms.

On September 30, 2013 at 10:00 a.m., 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.

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 https://incumbentworkforce.ohio.gov.