

Incumbent Worker Training Program



WIOA Adult & Dislocated Worker

WIOAPL 15-23.2

(Incumbent Worker Training (IWT) Guidelines)

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IWT under WIOA provides both workers and employers with the opportunity to build and maintain a quality workforce and increase both participants' and companies' competitiveness.

It is a type of work-based training and upskilling designed to ensure that employees of a company can acquire the skills necessary to retain employment and/or advance within the company, or to acquire the skills necessary to avert a layoff.

* Policy Updated June 2023 to include Governmental and Religious Entities.

Local workforce development boards (WDBs) can use up to 20 percent of their Adult and Dislocated Worker funding for the federal share of the cost. There are (2) Funding streams for Incumbent Worker Training.

To review the policies and guidance related to funding incumbent worker services, reference the following policies:

[WIOAPL 15-23.2 Incumbent Worker Training \(IWT\) Guidelines](#)

[WIOAPL 15-16.1 Rapid Response Program Requirements-Layoff Aversion](#)

[WIOAPL 18-01 Funding for Rapid Response Layoff Aversion](#)

Rapid Response Funding Application: **JFS 01815**

*Important to Note: Rapid Response funding should be utilized to supplement local funding, not take the place of local funding.



This Desk Aid will walk you through case managing the Incumbent Worker Training Program in ARIES.

Getting Set Up to Administer the IWT Program

With your Local Area IWT policy, procedures, and forms in place...

ARIES Chat hours: 8:30 am-4:30pm

Supervisors reach out to ARIES Chat for the following:



- Request your office be assigned the Incumbent Worker Training program.
- Request your staff, who will be administering the IWT program, be assigned the Incumbent Worker Training Program permission.

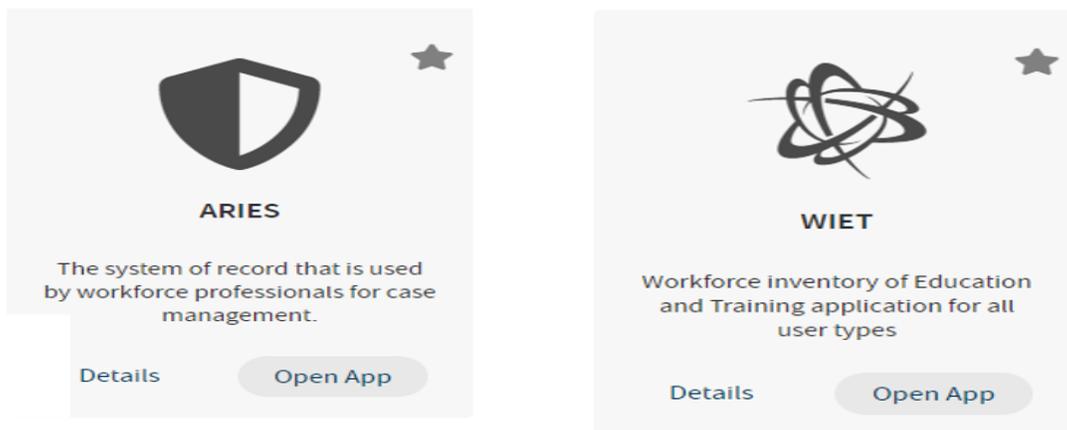
Supervisors/Staff use the IWT Employer & Worker List (excel spreadsheet) or create your own, to collect needed Employer and Worker information for ARIES data entry. IWT Employer & Worker List found: [WIOA Incumbent Worker Training | Job and Family Services \(ohio.gov\)](#) or contact: WIOAQNA@jfs.ohio.gov.

Supervisors/Staff reach out to ARIES Chat for the following:

- Verify that Employer is not currently in ARIES if you are not able to find them in “Search.”
- Request the Employer be added to ARIES in order to enter the Employer Incumbent Worker Training service. ARIES Chat will request the following Employer information to create a new Employer account: Employer Name, Address, FEIN, State, Employer Category: County Agency; State Agency; Federal Agency; Private For Profit; Private, Not For Profit.
- Add the Employer to WIET if the Employer is providing “In-house” training for the Incumbent Worker Training. Your OhioMeansJobs Center should not be selected as the Local Provider when entering the worker’s IWT service in ARIES.

[WIET Workforce Inventory of Education and Training](#)

[Secure access to State of Ohio services | OHJID | Ohio's State Digital Identity Standard](#)



WIET Questions? WIOAQNA@jfs.ohio.gov

Incumbent Worker Training Program

WIOA Adult & Dislocated Worker



Add Incumbent Workers to ARIES: IWT Employer & Worker List

Incumbent Workers need to be added to ARIES to record IWT enrollment and training service assistance:

- Send the IWT Employer & Worker List excel spreadsheet to the Employer for them to complete.
- IWT Employer & Worker List excel spreadsheet is broken into (2) Sections: Employer and Worker; This will collect the needed information required by ARIES for both a new Employer & Worker.
- **New to the Desk Aid:** the addition of Employer verification that the workers are aware their data will be entered into Ohio’s Case management system.
- If Employer is concerned with sharing Social Security Numbers, explain that Federal dollars are being spent on the worker/s skill upgrade whereby fiscal accountability and training success are reported to the Department of Labor.
- As mentioned on page 2, the IWT Employer must be added by the ARIES Chat, however anyone can add the IWT Worker/s to ARIES.

Page 1.

IWT Employer & Incumbent Worker List											
Date:											
Company Name:											
FEIN:											
Company Location Address:											
Employer Category: (circle/highlight category) County Agency; State Agency; Federal Agency; Private for Profit; Private; Not for Profit											
Company Contact Name:											
Company Contact's Email & Phone #:											
Number of Incumbent Workers at this address participating in the Incumbent Worker Training program:											
ELIGIBILITY CRITERIA:											
Workers participating in this Incumbent Worker Training are currently employed at my company: Y/N											
Workers have worked for Employer for 6 months or part of a cohort that on average, has worked for 6 months or more: Y/N											
Meets the Fair Labor Standards Act requirements for an Employer-Employee Relationship? Y/N (https://www.dol.gov/agencies/whd/flsa)											
<i>Employer has discussed with each worker, that due to the use of federal funds to fulfill the training, worker information will be recorded in the state of Ohio's federally mandated case management system. Y/N</i>											

Information needed to have a new Employer added to ARIES

Information needed to determine IWT Eligibility

Page 2.

Incumbent Worker List					
Employee Name	Email (if no email, use name@example.com)	Date of Birth	Social Security Number	United States Citizen? Y/N	Authorized to Work in the United States Y/N
<p>Information needed to add worker/s to ARIES and allow workers to soft exit when IWT training service is closed.</p>					

New to the Desk Aid: Acquiring a Social Security Number will avoid the need to enter the “Program Completion and Follow Up Surveys” in ARIES for each IWT worker. Having a social security number allows the automatic capture/ collection of Post Exit Employment and Wage data 2nd and 4th quarters by using the wage data systems in place.



Add Incumbent Workers to ARIES, cont.

- Using the Search at the top of any ARIES page, select “Customer” and type at least (3) letters and click “search.”



- Next, click the “New Seeker” button.



- Using the IWT Employer & Worker List or your own form completed by the Employer, complete the New Customer Record form.

New Customer Record

First Name *

Last Name *

Email Address *

DOB *

Date in mm/dd/yyyy format.

SSN

If collected from the Employer, enter Social Security Number to allow the ability to Soft Exit when IWT Training service has been closed.

Gender

Primary address

US Citizen *: Yes No

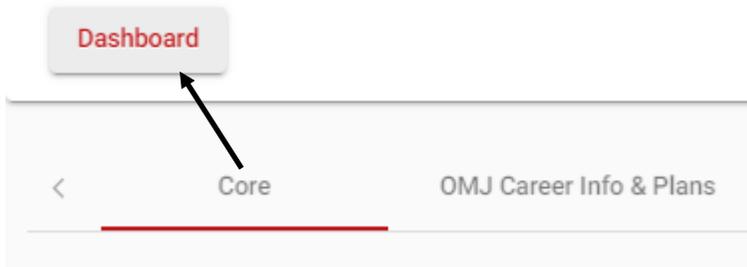
Authorized to work in this country *: Yes No

- Click “Submit.”

Submit

Determine IWT Eligibility

- With worker added to ARIES, go to the Customer **Dashboard**.



- Click on “Customer Eligibility and Enrollment.”
- Click “Create New.”

With Employee Record now in ARIES...

Enroll in the Incumbent Worker Training Program

Home / Customers / Test Testy / Dashboard / Eligibility And Enrollment

test testy (ID: 317215892)

Name : test testy

User Name : ag_testtest123

Address : test st Toledo 43611

Email : testytest@example.com

Mobile Phone : 1234435435

View Profile

Customer Services Cases UI Claimant Case Notes **Customer Eligibility and Enrollment** Plans

Customer Eligibility and Enrollment

Filter Items

Create New

Program Name	Eligibility Start Date ↓	Eligibility End Date	Eligibility Determination	Enrollment Start Date	Enrollment Status	Office	Actions
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Determine IWT Eligibility, cont.

- The “Select Active Program” pop up form appears.
- Locate the “Incumbent Worker (Not Adult or DW funded)” program and **Click (+)**.

Request submitted to delete: “Not Adult or DW funded”

Select the Program

Incumbent Worker (Not Adult or DW funded)

The screenshot displays a web interface for program selection. A modal window titled "Select Active Program" is open, showing a list of programs. The first program, "Incumbent Worker (Not Adult or DW funded)", is highlighted in yellow, and a red arrow points to its "+" button. The other programs listed are "WIOA Adult" and "WIOA Dislocated Workers". The background shows a navigation menu with "Customer Eligibility and Enrollment" selected, and a "Program Eligibility Determination Form" section with a "Select Program for Eligibility Determination" button.

***If you do not have “Incumbent Worker” as a Program to select, notify your supervisor so they can reach back out to the ARIES Chat to correct/add IWT Program Permissions.**

Determine IWT Eligibility, cont.

3 Questions determine IWT Eligibility:

(All 3 Criteria are listed on the IWT Employer & Worker list for the Employer to answer.)

1) Fair Labor Standards: Does the Employer/Employee meet the Fair Labor Standards? Y/N

(<https://www.dol.gov/agencies/whd/flsa>)

2) Length of Employment: Do they meet 1 of the first 2 categories in the drop down?: 6 months or more with employer; Less then 6 months with employer, majority of employees being trained have 6 months or more.

If they meet the 3rd category, "Does not meet either requirement"...they are not eligible for IWT.

3) Employment: Are they employed with the Employer who will participate in the IWT program? Y/N

(Employer and/or presence on the IWT Worker List confirms a "Yes" response.)

The image shows a screenshot of the "Program Eligibility Determination Form" for Incumbent Workers. The form is divided into several sections. The "Program Eligibility" section contains three criteria, each with a "Select One" dropdown menu. Green arrows point from these dropdowns to enlarged callout boxes on the right. The first callout is for "Fair Labor Standards" with options: "Select One", "--", "Yes", and "No". The second callout is for "Length of Employment" with options: "Select One", "--", "6 mo. or more with employer", "Less than 6 moth with employer, majority of employees being trained have 6 mo. or more", and "Does not meet either requirement". The third callout is for "Employment" with options: "Select One", "--", "Yes", and "No". Below the "Program Eligibility" section is the "Priority of Service" section, followed by "Program Eligibility Determination" with fields for "Determination *" and "Start Date *". At the bottom is the "Caseworker Signature" field. A large red text "3 Questions" is overlaid in the bottom right corner of the form screenshot.

*** IWT does not require source documentation to verify IWT criteria.**

Determine IWT Eligibility, cont.

- Select “Eligible” from the Program Eligibility Determination drop down menu.
- Sign.
- Click “Submit Determination.”

Enter “Eligible” for Determination; Sign; Submit

Priority of Service
No Priority of Service Rules defined for this Program's Eligibility Determination.

Program Eligibility Determination

Determination: **Eligible** ✓ Start Date: 03/13/2023

Additional Information

Caseworker Signature
Kyle Caseworker ✓

Back Create Draft **Submit Determination**

- Enrollment Status appears “Pending” until the Incumbent Worker Training service, which is an enrolling service, is entered.

Pending...Enrollment Status

Customer Services Cases UI Claimant Case Notes Customer Eligibility and Enrollment Plans Customer F

Customer Eligibility and Enrollment Create New

Program Name	Eligibility Start Date ↓	Eligibility End Date	Eligibility Determination	Enrollment Start Date	Enrollment Status	Office	Actions
Filter	Filter	Filter	Filter	Filter	Filter	Filter	
Incumbent Worker (No...	03/13/2023	06/10/2023	Eligible		Pending		⋮

Items per page: 10 1 - 1 of 1 |< < > >|

Enroll in IWT: Adding the IWT Service

The Incumbent Worker Training program in ARIES offers (1) Durational service: Incumbent Worker Training Service

(Durational enrolls and extends enrollment until manual closure/"Actual End Date" of IWT Service is completed.)

- From the Eligibility and Enrollment tab on the Customer Dashboard, scroll left to land on the "Customer Services" tab.
- Select "Record New Service."

The screenshot shows the 'Customer Services' tab selected in the navigation bar. Below the navigation bar, there are fields for 'Start Date *' (05/02/2022) and 'End Date *' (06/01/2022). A 'Filter Services' input field is present. A table with columns for 'Entry date', 'Actual date', 'Office', 'Last modified by', 'Service name', 'Program / Grant', 'Status', and 'Actions' is visible. The 'Record New Service' button is highlighted with a yellow circle.

- "Programs and Grants" pop up screen appears. Check the box to select "Incumbent Worker (Not Adult or DW funded) Eligible" then click "Add Programs or Grants" button.

The screenshot shows the 'Programs and Grants' pop-up screen. It has a title 'Programs and Grants' and a subtitle 'Select eligible programs or grants'. There are two checkboxes: 'Incumbent Worker (Not Adult or DW funded) - Eligible' (checked) and 'Reportable Individual - Eligible' (unchecked). The 'Add Programs or Grants' button is highlighted with a yellow circle.

Enroll in IWT: Adding the IWT Service, cont.

<input checked="" type="checkbox"/> Incumbent Worker Training	Check the IWT box.
Service End Date <small>Date in mm/dd/yyyy format.</small>	Leave blank until Training is over and service can be closed.
Service Delivery Type * No Virtual/Online, In-person...	Select the method of training: Virtual; In person; a combination.
State or Local * Select either State or Local training provider based on who is delivering the training.	Is training provided by a State or Local Provider? Once "State or Local" is selected from the drop down menu, a Provider table appears to search and select the specific training provider.
Select Local Provider Provider name DMA Tech Solutions	*Remember, if the Employer is providing in-house training, they should have been entered on WIET first. (Page 2: Getting Set up to Administer the IWT program; <i>OhioMeansJobs Centers should NOT be selected as a Local Provider.</i>)
Program name * Maintenance Technician Training	Manually enter/type the name of the Training being provided.
Program Category * Skill Upgrade	Enter "Skill Upgrade" for IWT Program Category.
Position	Not a required field, but you can add the position name for the training, i.e. Maintenance Technician.
Anticipated Start Date 06/22/2023 <small>Date in mm/dd/yyyy format.</small>	Anticipated End Date 12/29/2023 <small>Date in mm/dd/yyyy format.</small>
Actual Start Date <small>Date in mm/dd/yyyy format.</small>	Actual End Date <small>Date in mm/dd/yyyy format.</small>
Occupation * Maintenance and Repair Workers, General	Select the ONET Code that aligns with the Program name from above to auto-fill.
Cost * 15000	Enter either Total Cost of the IWT for this Employer or divide total cost by the number of workers. CFIS records true costs.

Enroll in IWT:

Adding the IWT Service changes “Pending” to Active

Incumbent Worker/Employee is NOW actively enrolled in the Incumbent Worker Training (IWT) Program and becomes an IWT Participant.
Participant Dashboard View...

Program Name	Eligibility Start Date ↓	Eligibility End Date	Eligibility Determination	Enrollment Start Date	Enrollment Status	Office	Actions
Incumbent Worker (Not A...)	03/13/2023	06/10/2023	Eligible	03/13/2023	Active	Office RR	⋮

Staff Dashboard View (Case manager)...

Name	SSN	County	Veteran	CH 31	Status	Days Until Exit	Last Qual. Service	Programs	Actions
TEST PATRON		Lucas	No	No	Enrolled	87	05/10/2023	WIOA Dislocated Workers	⋮
Test data		Hancock	Yes	No	Enrolled	71	04/24/2023	Incumbent Worker (Not Adult or DW funded)	⋮
Test Account		Franklin	No	No	Follow up		04/24/2023		⋮

Incumbent Worker Performance under WIOA

WIOAPL 15-23.2

Employees whose only WIOA-funded service is IWT are not participants for the purpose of inclusion in WIOA primary performance indicator calculations. However, states and local areas are still required to report certain participant and performance data on those individuals who receive only IWT. The required elements for these incumbent workers are limited to basic information and the elements needed to calculate IWT performance indicators for employment in the 2nd and 4th quarters after exit, median earnings in the 2nd quarter after exit, measurable skill gains, and credential attainment.

If a local area wishes to co-enroll an IWT participant in the local Adult or Dislocated Worker program, a full registration is required in the case management system which includes all of the data elements needed for WIOA participants, including performance data. Co-enrolled participants must meet all eligibility and documentation requirements for the applicable program (Adult, Dislocated Worker, or Youth).

			
Measurable Skills Gains	Credential Attainment	Employment (Education Training or Employment 2nd & 4th Qtr.)	Median Earnings

This IWT Desk Aid will identify where and when these Performance Measures are captured for the Incumbent Worker in ARIES.

If pre-determined assessments are part of the IWT plan to gauge the participant's progress during the IWT, measurable skill gains can be captured in ARIES. Use either location.

1.

View Profile

Skill Progression

Entered on the participant's Profile as a Skill Progression; These can be exam-based or documented progress in attaining technical or an occupational skill.

The screenshot displays the 'MSG Skill Progression' section of the ARIES interface. It features two main sections, each with an 'Add New' button. The first section, 'MSG: Skill progression (exam-based benchmark)', contains a table with columns for Exam Name, Exam Type, Exam Date, Score, Passed, and Actions. Below the table are filter fields for each column and a message stating 'No Exam based benchmark found'. The second section, 'MSG: Skill progression (Documented progress in attaining technical or occupational skill)', contains a table with columns for Skill Gain, Date, Notes, and Actions. It also has filter fields and a message stating 'No other skill gain found'. Both sections include a pagination control showing 'Items per page: 10' and '0 of 0'.

2.

Dashboard

Training Milestones

Go back into the IWT service on the Customer Services tab; click "Edit Service;" click "Manage Training Milestones" at the bottom of the IWT service form.

Manage Training Milestones

The screenshot shows the 'New training milestone' form. It includes a date field for 'Training milestone date' set to 5/14/2023. Below this are two questions with radio button options: 'Does the customer have a satisfactory progress report towards an established milestone from the employer or training provider? *' and 'Is the customer on track to complete the training on schedule? *'. The bottom section, 'Training milestone related documents', provides options to 'Choose File for upload' and 'Copy already uploaded File'. It also lists file size and type restrictions: 'Max size: 5MB' and 'Max size: 900MB' for various document and image formats. The form concludes with 'Cancel' and 'Save training milestone' buttons.

Closing the Incumbent Worker Training Service

IWT Service can be closed when the Incumbent Worker Training has been completed. When appropriate, add any needed Training Milestones or MSG Skill Progressions to capture the positive performance outcomes **before** closing the service.

- From the Customer Services table, locate the “Open” IWT service, click (3) Dots under “Actions” to select “View Service.”

Customer Services

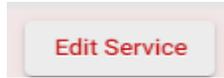
Service name	Program / Grant	Status	Actions
<u>Filter</u>	<u>Filter</u>	<u>Filter</u>	
Incumbent Worker Training	Incumbent Worker (Not A...	Open	⋮

Items per page: 10 1 - 1 of 1

View Service

Closing the Incumbent Worker Training Service, cont.

- With the IWT service form open, click “Edit Service” at the bottom.
- Enter “Actual Start and End Dates”; and “Completion Status.”
- If a Credential was earned as a result of IWT, complete the Credential fields.
- Click “Save”



Service End Date
06/22/2023

Service Delivery Type
No Virtual/Online, In-person O... ▾

State or Local
Local ▾

Select Local Provider

Provider name
RESTORE

Program name
DMA Tech Solutions

Program Category
Skill Upgrade ▾

Position

Anticipated Start Date
05/15/2023

Anticipated End Date
06/22/2023

Actual Start Date
05/15/2023

Actual End Date
06/22/2023

Occupation
Maintenance and Repair Workers, General

Cost
15000

Completion Status
Completed - Successful ▾

Certificate Earned
Occupational Certificate ▾

Certificate Date
06/22/2023

Enter Actual Start and End Dates of Training.

Enter Completion Status from drop down options, based on results.

Enter type of Certificate **if one was earned** with date. This is a “credential.”

Credential Attainment is a WIOA Performance Measure.



NEW TO THE DESK AID

Program Completing (Exiting) the Incumbent Worker and Capturing Post Exit Employment and Wages

***SOFT EXITING:**

IF you collected and added a social security # in ARIES for the incumbent worker...

Once you close the IWT service on the Customer Services tab, you have completed the data entry for this worker. The case will soft exit in 90 days.

The Wage Record systems will then pick up the employment and wage data necessary for 2nd and 4th quarter WIOA performance measures. Follow Up Surveys do not need to be submitted.

***HARD EXITING:**

***IF you were not able to secure the social security number for the incumbent worker...**

Contact the Employer and proceed to enter the “Program Completion” requirement to hard exit the incumbent worker.

Contact the Employer to then continue to submit the Follow Up Surveys to capture the post exit employment and wage data.

(Pages 17-21)

IWT Program Completion (Hard Exit)

Program Completion should occur when the IWT service is closed AND no other assistance is needed due to the worker's new skill upgrade and current employment.

- On Customer Dashboard, go to “Customer Eligibility and Enrollment” tab.
- With the “Active” Incumbent Worker Program located, click the (3) Dots under “Actions” and click “View Enrollment.”
- Click on “+ add Program Completion.”
- Complete the “New Program Completion” form. While the completion reason is not recorded for State or Federal reporting purposed, we suggest Completion Reason: “Employability Enhancement”

The screenshot displays the 'Customer Eligibility and Enrollment' dashboard. A table lists an 'Incumbent Worker (Not A...)' program with dates 03/13/2023 and 06/10/2023, status 'Eligible', and end date 03/13/2023. The program is 'Active' and 'Office RR'. A dropdown menu is open under 'Actions', showing 'View Enrollment' and 'View Eligibility Determination'. Below the table is the 'Program Enrollment' section for 'Incumbent Worker (Not Adult or DW funded)', with a '+ add Program Completion' link. The 'New Program Completion' form is shown with 'Employability Enhancement' selected as the reason and '06/22/2023' as the completion date. A red arrow points to the 'Opt-out of Follow-up' checkbox.

Select Completion Reason: Employability Enhancement

Enter Date; Should align with Actual End date on IWT service

Checking this box or not, does not matter for IWTs. If box is checked, it deletes the Follow **SERVICES** section, which are not required for IWTs. **If checked or not, the required Follow Up Surveys will always be available.**

Reminder: If IWT service is still open, you will not be able to “Program Complete”/Hard Exit.

IWT Program Completion (Hard Exit), cont.

Contact the Employer...

Complete "Outcome Information" section:

- **Employment:** Employed: **Yes**; Employment Start Date: Use start date of IWT; Training Related: Enter **Yes**, as this training does strengthen their current employment; Traditional Employment: **Yes**; Unsubsidized Employment: **Yes**; Fringe Benefits/Hours/Wages: answer to the best of your ability.
- If a credential was achieved as a result of Incumbent Worker Training, capture it on the **Credentials** section: Credential Earned: **Y/N**; Credential Date; Type of Registered Credential; Credential Verification Type: (How verification was completed: by Transcript or Report Card or Employer Verification?).
- If a credential was earned, upload verification on "Choose File to Upload" at bottom.

Outcome information

Employment

Employed * : Yes No

Employment Start Date *

02/02/2017

Date in mm/dd/yyyy format.

Training Related * : Yes No

Agricultural Employment * : Yes No

Self-Employed * : Yes No

Entered in Military Services * : Yes No

Hours per week *

40

Only include numbers.

Employer name *

DMA SOLUTIONS

Search for an employer

Occupation *

Maintenance and Repair Workers, General

Annualized Wage *

\$52,000.00

Keyword or O*NET-SOC Code

Use the start date of IWT training.

These are required fields; Answer s are suggested above along with your input.

Traditional Employment * : Yes No

Unsubsidized Employment * : Yes No

Fringe Benefits Received * : Yes No

Credentials

Credential Earned * : Yes No

Credential Date *

04/13/2023

Date in mm/dd/yyyy format.

Type of Recognized Credential *

Occupational Skills Certificate

Credential Verification Type *

School / Employer Notification

Credential Attainment captured here IF a credential was earned; Same as when you closed the IWT service.

Submit

Choose File for upload

Copy already uploaded File

Post Exit: Follow Up Surveys to capture Performance

Contact the Employer to follow up and collect this information

- On the Customer Eligibility and Enrollment tab, go to “Closed” Incumbent Worker Program.
- Click (3) Dots under “Actions” and select “View Enrollment.”
- Click on the “Link to Follow Up Screen” to access Follow Up Surveys.

Customer Eligibility and Enrollment Create New

Program Name	Eligibility Start Date ↓	Eligibility End Date	Eligibility Determination	Enrollment Start Date	Enrollment Status	Office	Actions
Incumbent Worker (Not Adult ...	02/22/2023	05/22/2023	Eligible	02/22/2023	Closed	Office RR	⋮

Program Enrollment

Program Name: Incumbent Worker (Not Adult or DW funded)

Program Completion

[View Program Completion](#)

Program Completion Date: 04/17/2023

Reason: Employability Enhancement

Followup

[Link to Follow Up Screen](#)

Follow Up Surveys (REQUIRED for Incumbent Workers)

Employment/Earnings in the 2nd and 4th quarters after exit

*Manually entered, Hard Exits in ARIES can be verified on this screen by the Program Completion Date & Reason now visible.

Post Exit: Follow Up Surveys to capture Performance, cont.

Contact the Employer to follow up and collect this information

- Clicking the “Link to Follow Up Screen” opens the Program Enrollments Information Table.
- Surveys can be completed when information such as wage data changes (ie a pay raise) .
- Surveys of Importance: (2 & 4 critical to positive performance outcomes)

Program Enrollment

Program Name Incumbent Worker (Not Adult or DW funded)

Program Completion
[View Program Completion](#)

Program Completion Date 06/22/2023
Reason Employability Enhancement

Followup
[Link to Follow Up Screen](#)

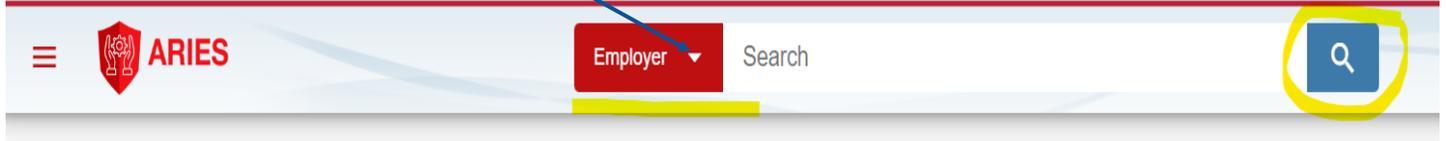
Follow Up Plan

End Date: 04/17/2023

Follow Up Survey	End Date
Follow Up Survey 0	03/31/2023
Follow Up Survey 1	06/30/2023
Follow Up Survey 2	09/30/2023
Follow Up Survey 3	12/31/2023
Follow Up Survey 4	03/31/2024
Follow Up Survey 5	06/30/2024
Follow Up Survey 6	09/30/2024
Follow Up Survey 7	12/31/2024

Adding the Employer IWT Service

- If Employer is not already on your Employer Information tab on your Staff Dashboard, use the Search feature at the top of all ARIES screens to locate them. Make sure the “Employer” category is selected in the drop down menu.



- With the Employer located, click on the (3) Dots under “Actions” and click “View Dashboard.”

A screenshot of the ARIES search results page. The top navigation bar shows the ARIES logo, a dropdown menu with 'Employer' selected and 'TVEK' entered in the search field, and a search icon. On the right, there are icons for 'CHANGE OFFICE', a chat bubble with '2', a notification bell with '9', and a user profile icon. Below the navigation bar is a breadcrumb trail: 'Home / Companies / Search'. The main content area is a table with the following columns: Employer Name, Employer FEIN, State Tax ID, Street Address, City, State, Zip, County, QCEW Location?, and Actions. The first row of data is highlighted in yellow and shows 'TVEK ENTERPRISES IN...' with FEIN 542124716, State Tax ID 52720390, Street Address 2200 Commercial Ave, City Mingo Junction, State OH, Zip 43938, and QCEW Location? No. The Actions column for this row has a vertical ellipsis icon. A red arrow points from the text above to this icon. A callout box with a grey background and a white border is positioned over the bottom right of the table, containing a grid icon and the text 'View Dashboard'.

Adding the Employer IWT Service, cont. on the Employer Dashboard

- Employer Services are considered Transactional. They can be entered once which completes the IWT service entry for the Employer. (Employers do not enroll in the IWT program like the Incumbent Workers.)
- Click on “Services Rendered” on the Employer dashboard, then “Record Service.” Employer IWT service should be entered when the IWT starts for the participants.
- Case Notes are also encouraged to tell the story and support effective record keeping.

The screenshot shows the ARIES Employer Dashboard interface. At the top, there is a navigation bar with the ARIES logo and a dropdown menu set to 'Employler'. Below this is a horizontal menu with tabs: 'Event Registrations', 'Services Rendered' (highlighted in yellow), 'Recruiters', 'Locations', and 'Case'. The main content area is titled 'Record a service for Ghysla DMA Tech Solutions'. It contains several form fields: 'Service Date *' with the value '4/13/2023'; 'Office' with a dropdown menu showing 'Office RR' and a note 'Current office is pre-selected.'; 'Location'; 'Recruiter'; 'Program or Grant *' with a dropdown menu showing 'Business Services'; 'Service Name(s) *' with a dropdown menu showing 'Incumbent Worker Training'; 'Service end date for Incumbent Worker Training'; and 'Case Note' with a dropdown menu showing 'Incumbent Worker Training Employer Service'. A 'Record Service' button is located on the right side of the form. Several yellow checkmarks are overlaid on the form, indicating that the 'Business Services', 'Incumbent Worker Training', and 'Case Note' fields are correctly filled out.

- Upload the IWT Employer & Worker List and any IWT Employer documents on the Document Upload tab on the Employer Dashboard.

In support of protecting PII (Personally Identifiable Information)

DO NOT UPLOAD COPIES OF THE WORKER LIST INTO INDIVIDUAL INCUMBENT WORKER CASE FILES OR ARIES ACCOUNTS.

The screenshot shows the navigation bar of the ARIES Employer Dashboard. It contains several tabs: 'Case Notes', 'Services Rendered', 'Event Registrations', 'WOTC', 'Rapid Response', and 'Document Upload'. The 'Document Upload' tab is highlighted with a red underline.

Employer Performance Measures

- By capturing the Incumbent Worker Participant's Post Exit Employment and Wage data in ARIES, Retention measure is accomplished.
- By entering the Employer IWT Service, Repeat Business is captured.

Performance Measures "Effectiveness in Serving Employers" (2 Categories)

- **Retention**-% of participants who exit and are employed in 2nd and 4th quarters after exit.
- **Repeat Business**-% of Employers by location who receive Employer services more than once within the previous (3) program years.



Incumbent Worker Training (IWT) Resources

- **WIOAPL 15-23.2** (Incumbent Worker Training (IWT) Guidelines)
[WIOAPL 15-23.2 Incumbent Worker Training \(IWT\) Guidelines](#)
- **IWT Employer & Worker List excel Spreadsheet**-visit the OWD Training Programs to download a copy

[IWT Training Program](#)
- **Incumbent Worker Training Program Questions; Requests for the WIOA IWT Employer & Worker List template; Requests for the ARIES IWT Backdating template:**

WIOAQNA@jfs.ohio.gov
- **Workforce Inventory of Education and Training (WIET):**
Website: [WIET Workforce Inventory of Education and Training](#) & WIET Questions: WIOAQNA@jfs.ohio.gov
- **Local Area IWT Policy/Program/Process Questions:**
(Area 19) Craig Sernik: craig@noccog-area19.com/(440) 285-5846

Incumbent Worker Training (IWT) Resources

[IWT Training Program](#)

- **Incumbent Worker Training Session– Webinar & PowerPoint**
- **WIOAPL 15-23.2 Incumbent Worker Training (IWT) Guidance**
- **IWT Employer & Worker List Template**
- **JFS 01815– Rapid Response Layoff Aversion Funding Application/form**
- **Incumbent Worker Training IWT Workforce GPS (Department of Labor)**
<https://ion.workforcegps.org/resources/2019/05/08/15/08/Incumbent-Worker-Training-IWT>