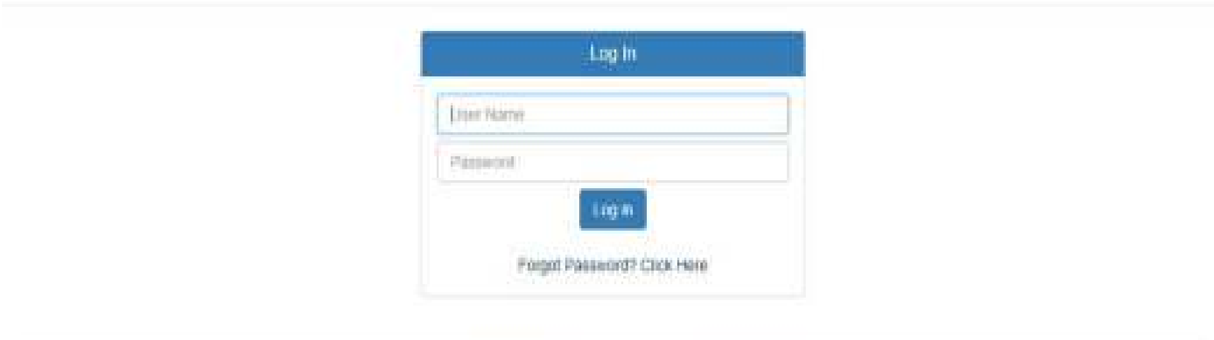
Iowa Jobs Training (260E/260F/WTED)
Training Management System Guide



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Creating a log in

You will receive an email with your username. Click the link in that email to create your own password.

Dear testuser:

Welcome to the Online Reimbursement System!
Your username above has been created for you, but you may choose your own password. Your password: WK68nb
Please create a password for the first time by clicking here.

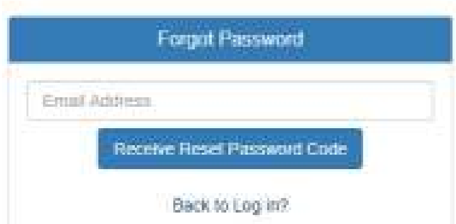
If you have questions, please contact your Business Consultant.

Thank you,
System Administrator

Main Login page

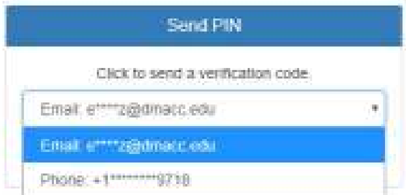
If you forget your password, click here to email a temporary password to your address.

You will then be prompted to create a new password.



Login Security Features

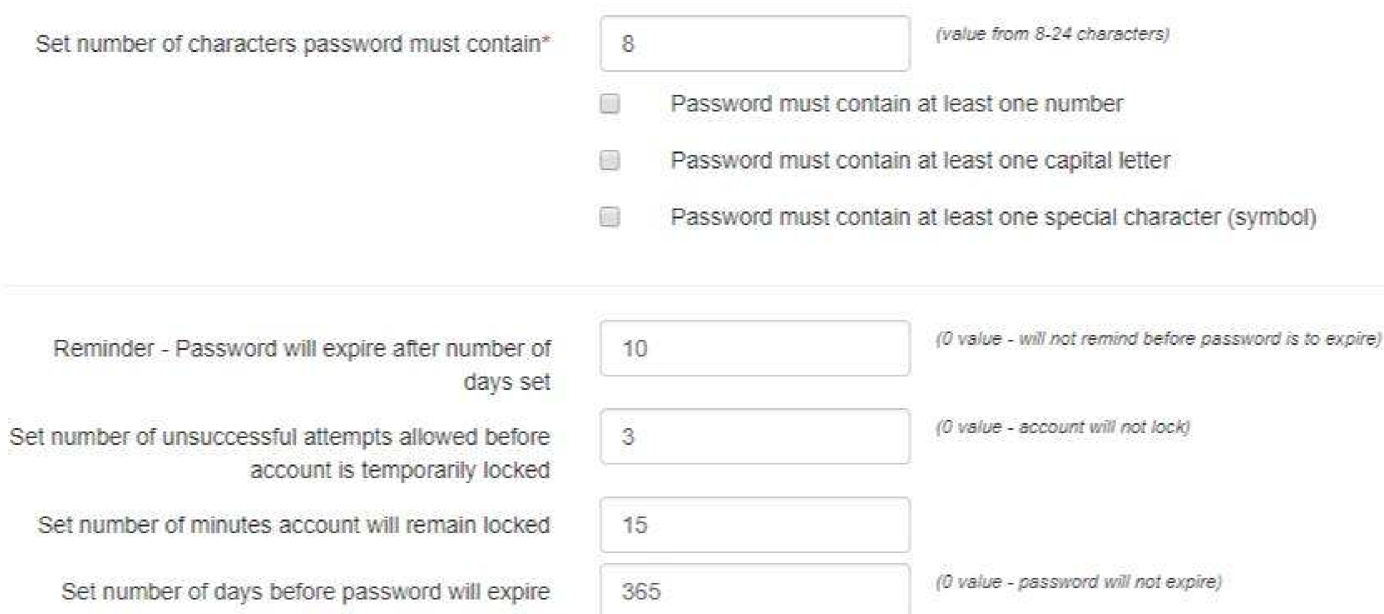
The system requires two-step authentication. You may choose to receive a verification PIN via email or add your cell phone number to your account to receive a text.



Company-specific Password Security Features

The system administrator is able to set password security to align with your individual company policy.

These features are available for you to implement as you choose; no changes are made without your direction.



You are able to determine:

Length of password

Character content of password

ExpiraΘon of password and reminder of expiraΘon

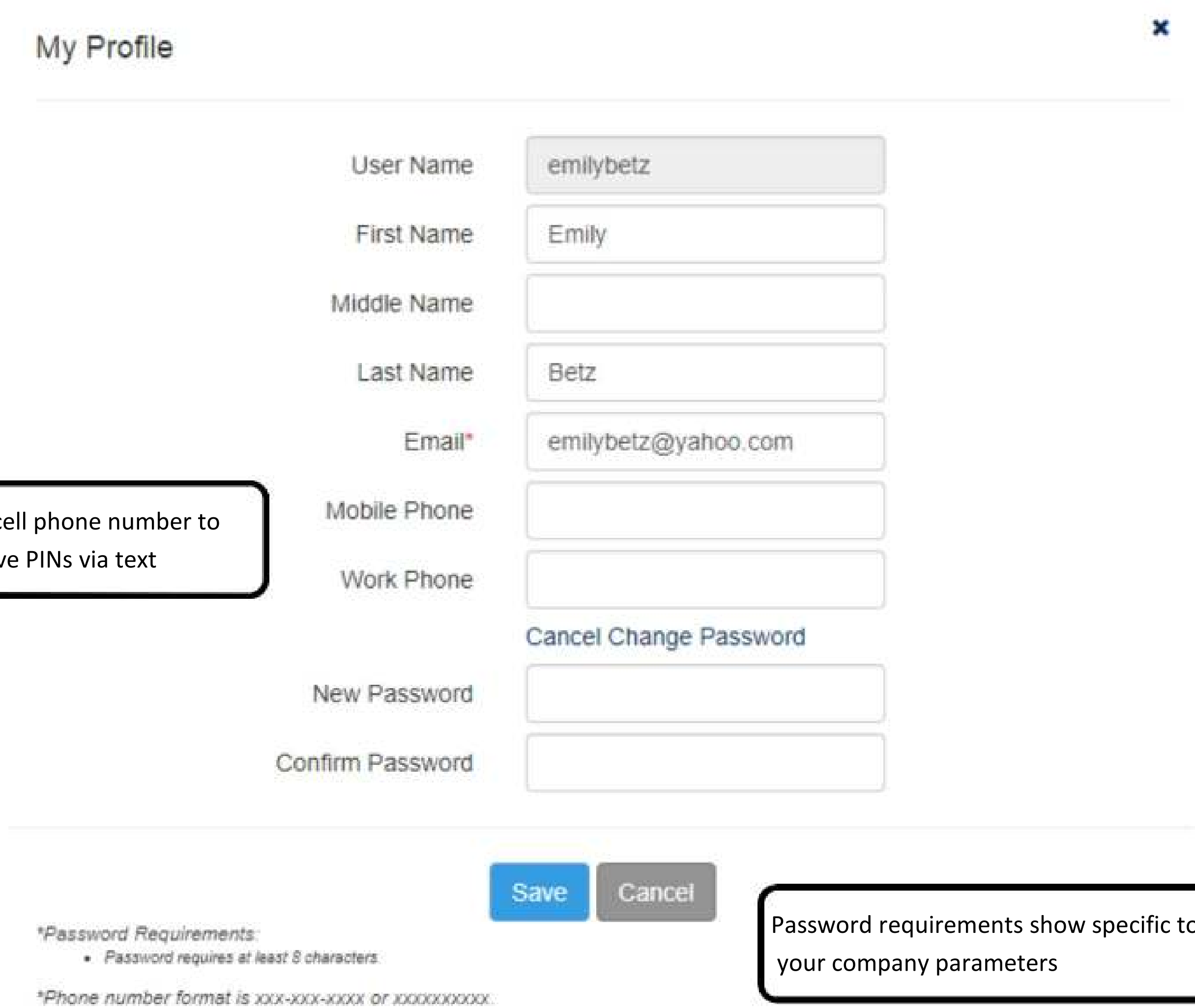
Number of unsuccessful aΣempts before locking account

Time account is locked

Changing Profile Preferences

On the top right of the screen, Click on the Hello [Name] link to bring up the profile screen.

Add your cell phone number to receive verification PIN via text. Change your preferred email address and password at any time.



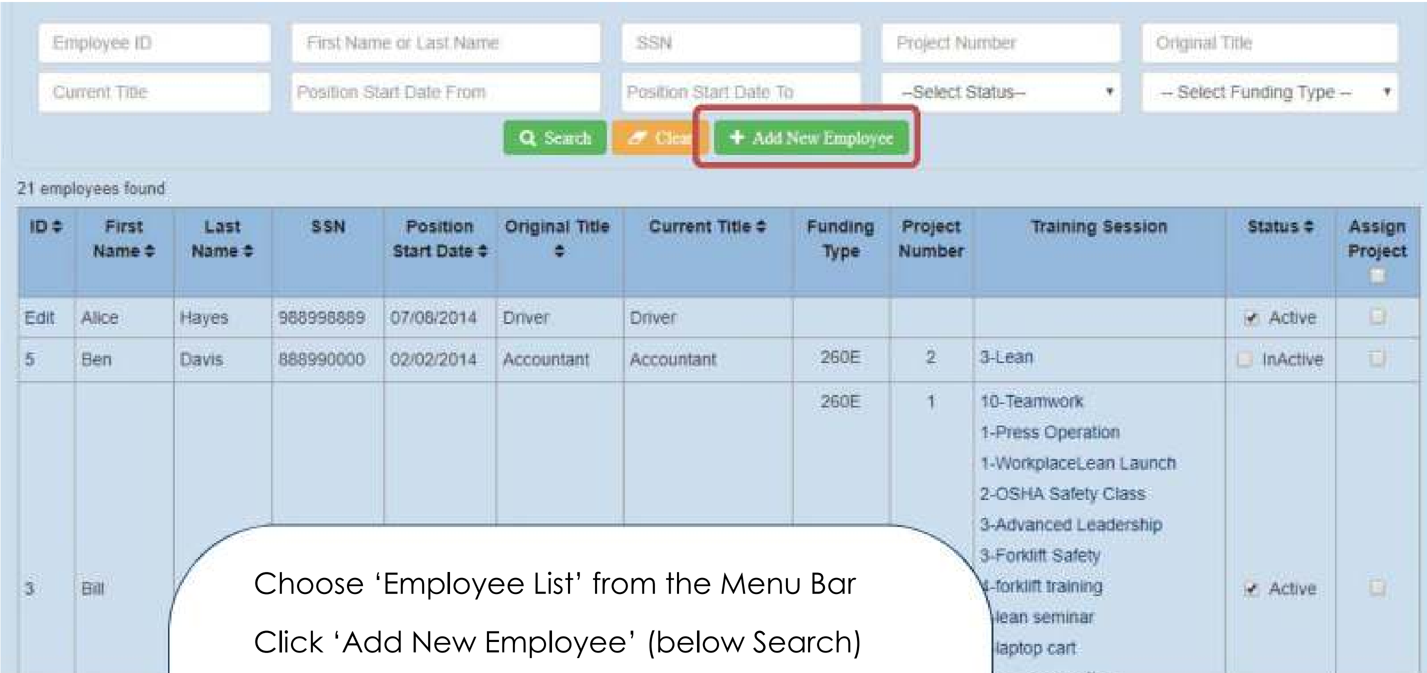
Add cell phone number to receive PINs via text

Password requirements show specific to your company parameters

Make any necessary changes and click 'Save'

Adding Employees—Employee List—Individual or Multiple Additions

You can add individual or multiple employees using the ‘Employee List’ tab on the Menu Bar. Employee data is encrypted within the database at save.



Choose ‘Employee List’ from the Menu Bar

Click ‘Add New Employee’ (below Search)

A new window will pop up for you to fill out employee information

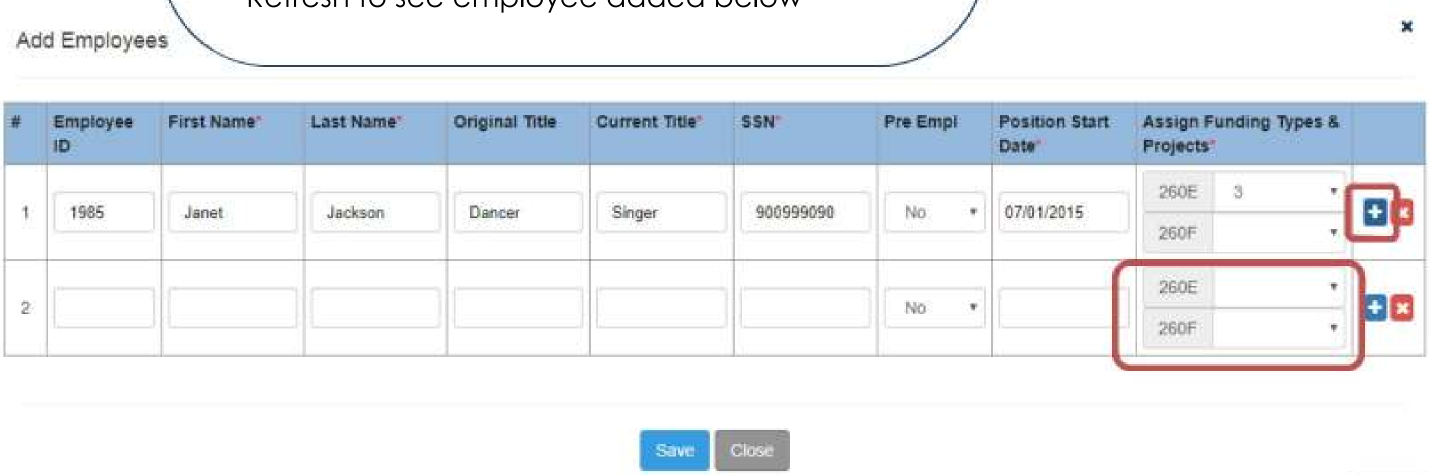
NOTE: Employee ID is optional, all other fields are required

If you want to add more than one employee, click the plus sign.

Assign the employee to the applicable project.

Click ‘Save’

Refresh to see employee added below



Adding Employees—Individual Additions—within Reimbursement Sessions

You can add individual employees within the system, while entering Classroom or OJT training session information. The employee information will be added to the session and to the project Employee List.

Employee data is encrypted within the database at save.

Click ‘Add New Employee’

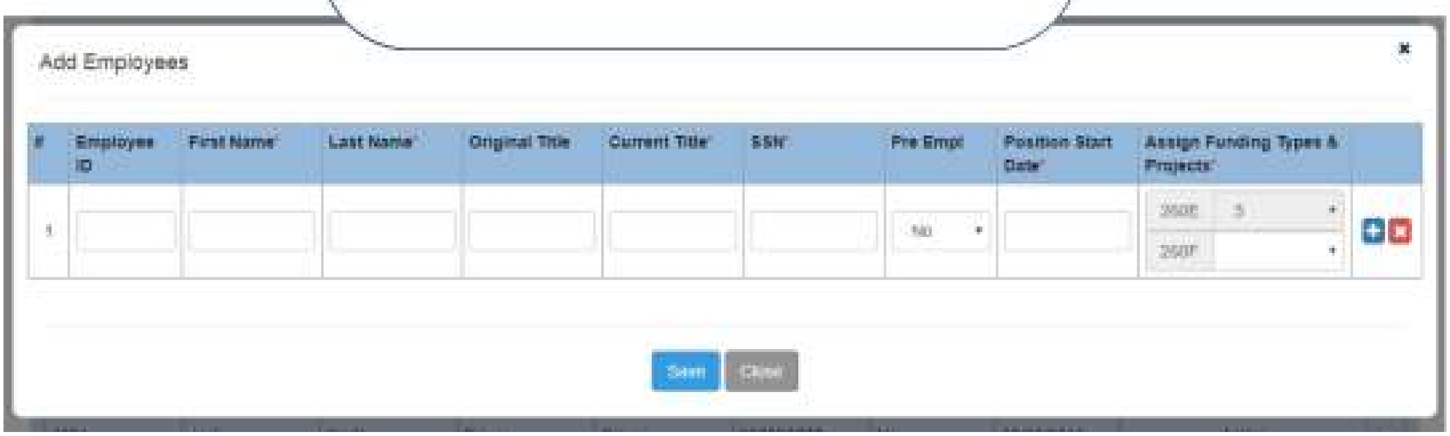
A pop-up dialogue will open

Fill in fields

NOTE: Employee ID is optional, all other fields are required

Click ‘Save’

Employee will automatically be added to the session and master Employee List, assigned to the correct project

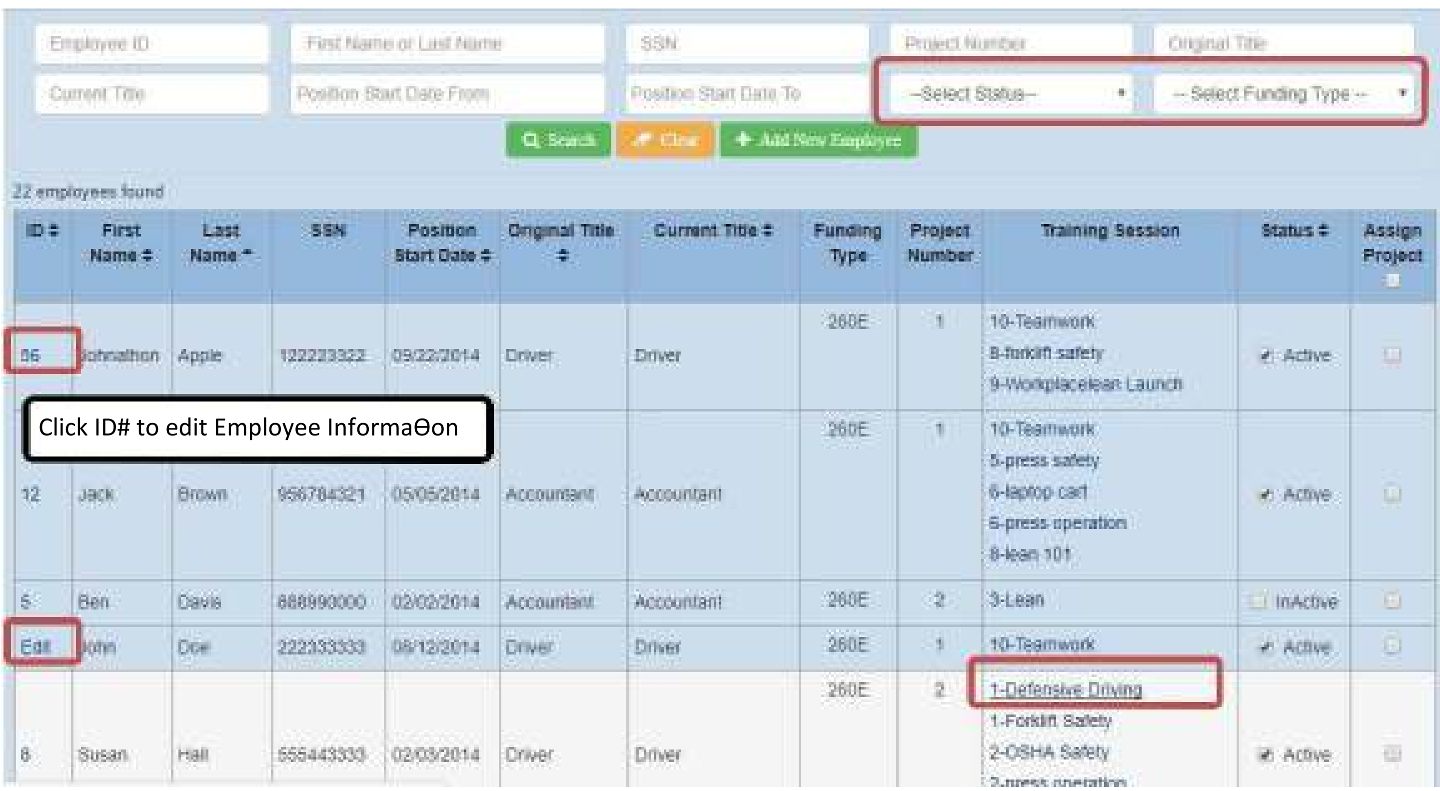


Employee List—Master List and Search

You can edit individual employees to assign them to projects and/or inactive them in a project. You can also filter by funding type and status (active/inactive) and sort accord-ing to any column.

As you add training information, you can also see which session each employee has been submitted for, by employee. Click the link to open the session.

Filter by status and/or type



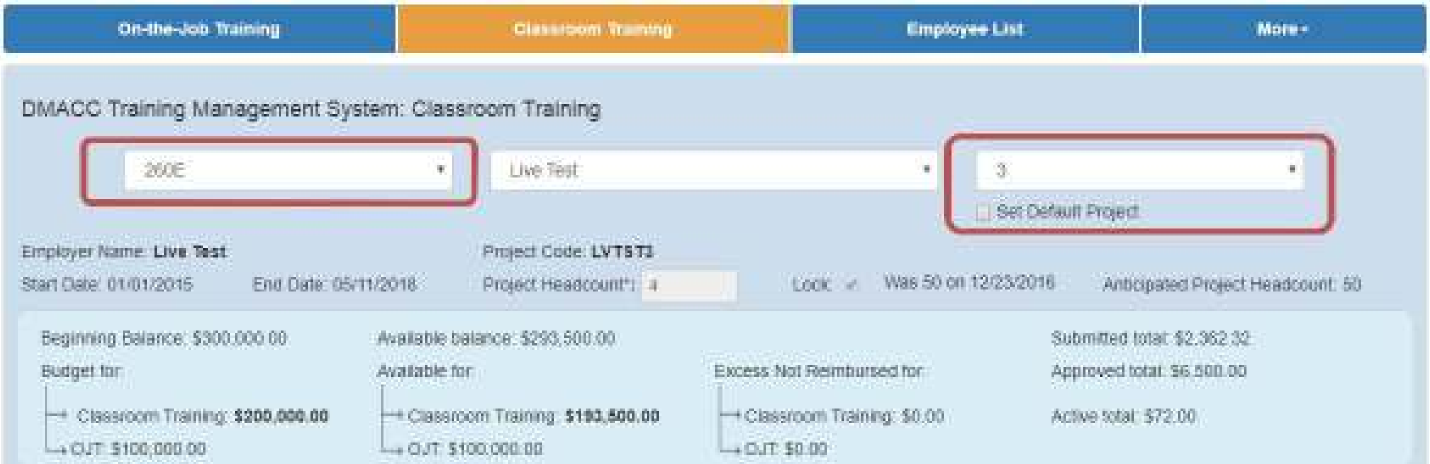
ID	First Name	Last Name	SSN	Position Start Date	Original Title	Current Title	Funding Type	Project Number	Training Session	Status	Assign Project
06	Johnathon	Apple	122223322	09/22/2014	Driver	Driver	260E	1	10-Teamwork 8-forklift safety 9-Workplacelean Launch	Active	
12	Jack	Brown	956784321	05/05/2014	Accountant	Accountant	260E	1	10-Teamwork 5-press safety 6-laptop cart 6-press operation 8-lean 101	Active	
5	Ben	Davis	888990000	02/02/2014	Accountant	Accountant	260E	2	3-Lean	InActive	
Edit	John	Doe	222333333	08/12/2014	Driver	Driver	260E	1	10-Teamwork	Active	
8	Susan	Hall	555443333	02/03/2014	Driver	Driver	260E	2	1-Defensive Driving 1-Forklift Safety 2-OSHA Safety 2-press operation	Active	

Click ID# to edit Employee InformaƟon

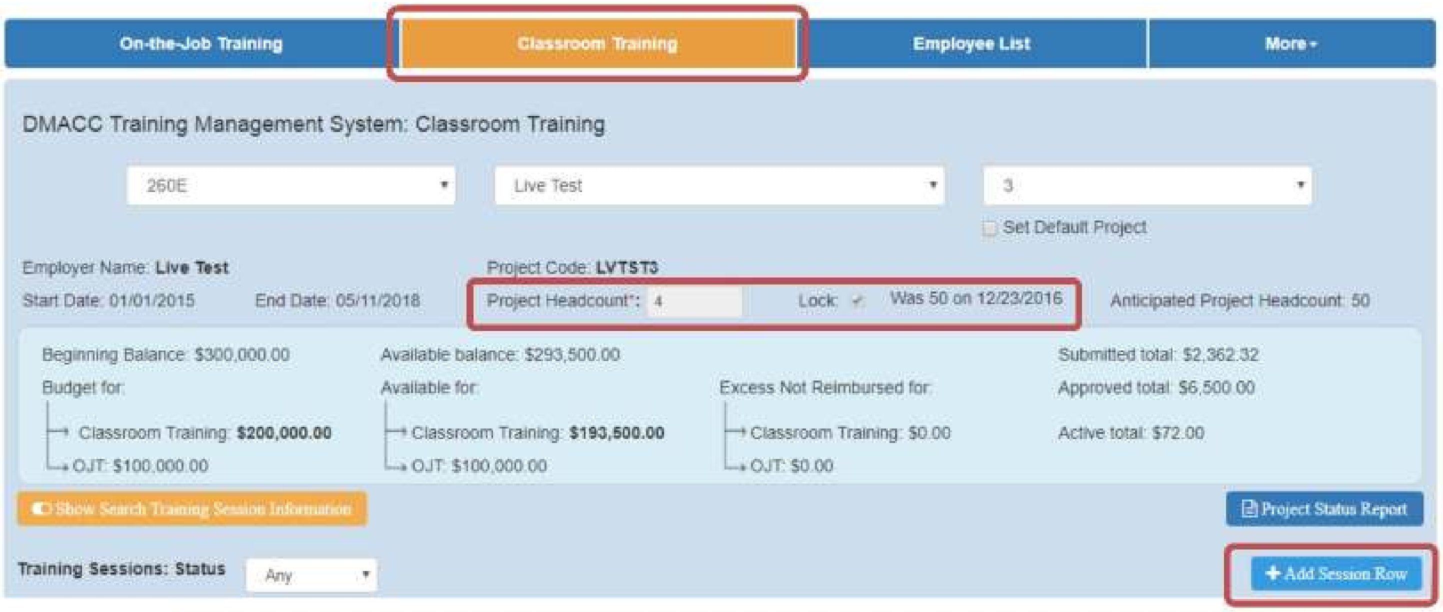
Click training description to open session

Entering Data—For ALL Training Fund types

If you have multiple funding types or projects, use one log-in and then choose the correct fund and project from the drop-down menu



Entering Classroom Training information



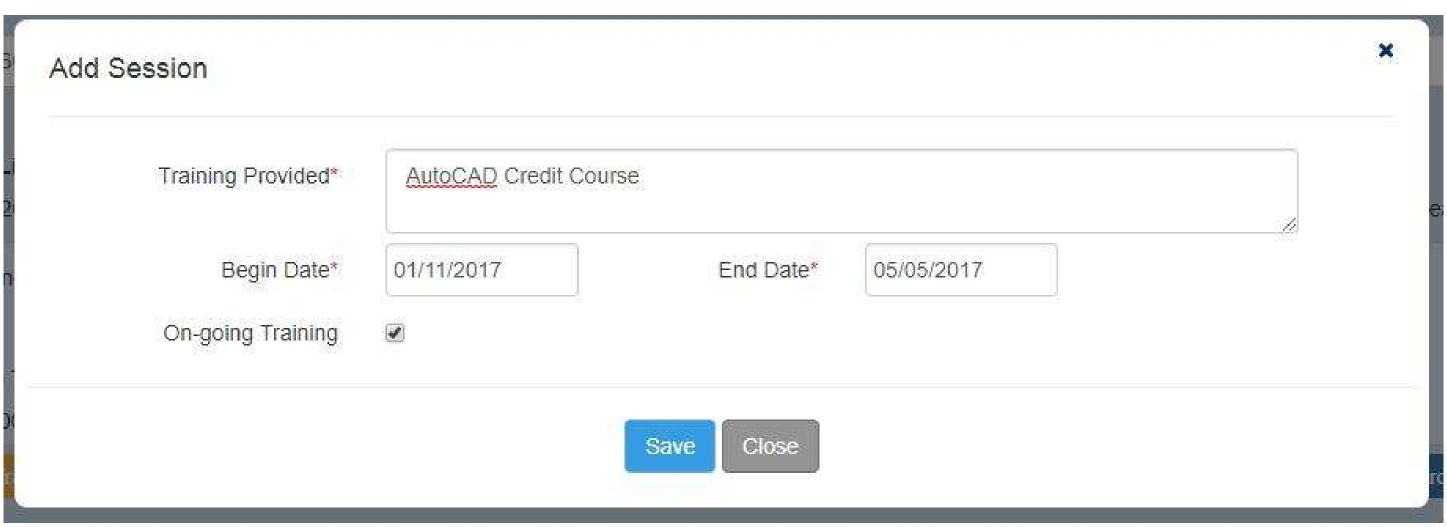
Project Headcount is now updated **automatically** from the Employee List. **NOTE:** It is vital to keep the Employee List up-to-date. The system will lock when you reach the anticipated project headcount, which allows you to access all funds for reimbursement.

Click ‘Add Session Row’ to start a new session for reimbursement.

A dialogue box will open

If the session is for on-going training, check the box so date validation errors can be avoided in other sessions.

Click ‘Save’ to continue entering information for the reimbursement session



Entering Classroom Training information...continued

Click the box(es) of the employee(s) who were trained, then click 'Add'

Add Information under Itemized Costs and Employees, adding new Itemized Cost rows as needed.

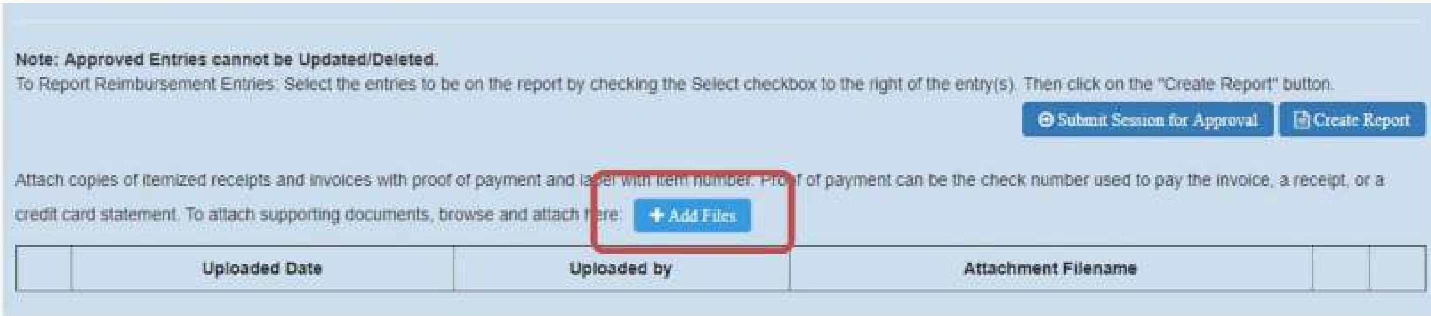
If the session is for items that are reimbursable for all project eligible employees, choose 'Yes' in the drop-down. **NOTE:** If you choose yes, you do not need to enter all employees under the Employee section.

You can search/filter employees by starting to type names or employee ID numbers, and clicking the box(es), then clicking 'Add'

If the eligible employee received training or assessment before the position start date, check the Pre-Employment box to avoid date validation errors.

The system will save changes automatically.

Entering Classroom Training information...continued



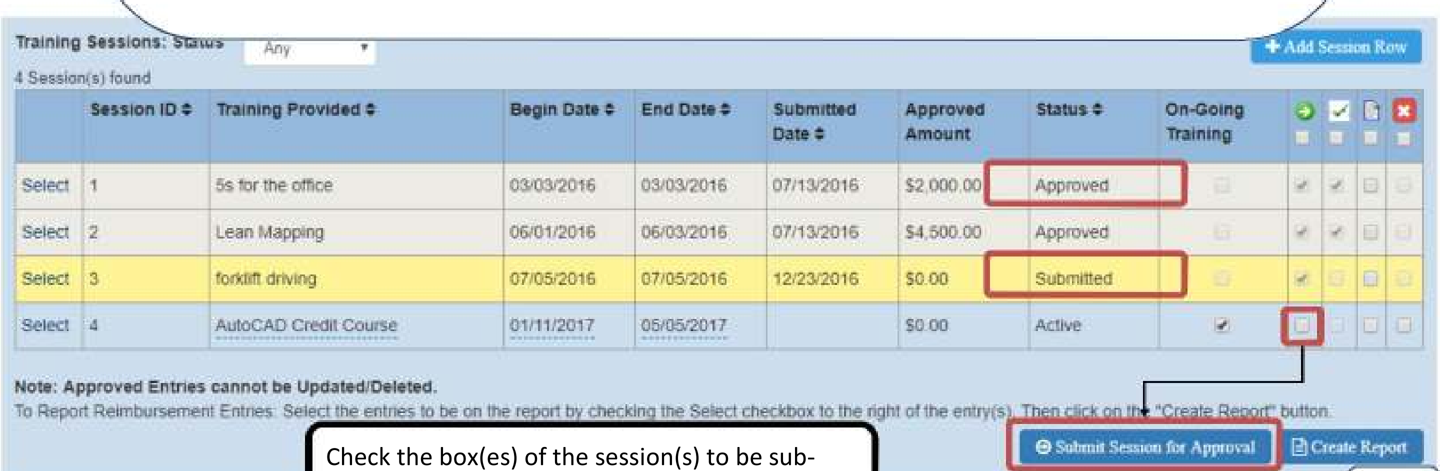
Files must be attached for supporting financial documentation for each session prior to submitting that session.

Click 'Add Files' to upload documentation. You may upload multiple files simultaneously.

Once you have chosen files, click 'Start' to upload them to the system. Once uploaded, you will see a green button that allows you to view them. You may also delete while the session is still Active.

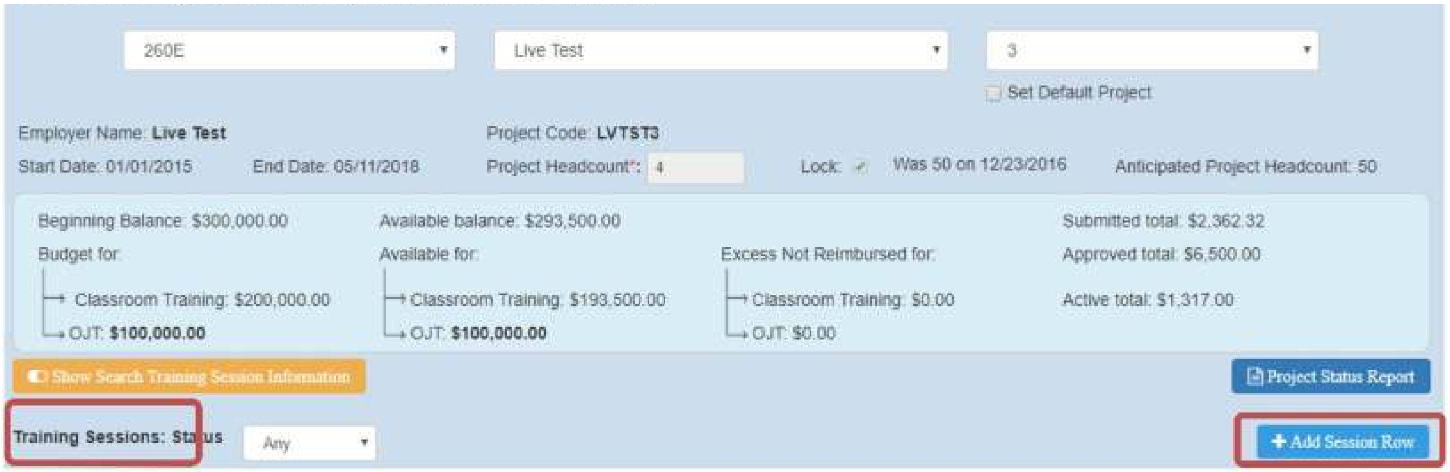
When ready to submit, click 'Submit for Approval'. The session then changes from Active (blue) to Submitted (yellow).
NOTE: Once submitted, you are unable to make any changes to that session.

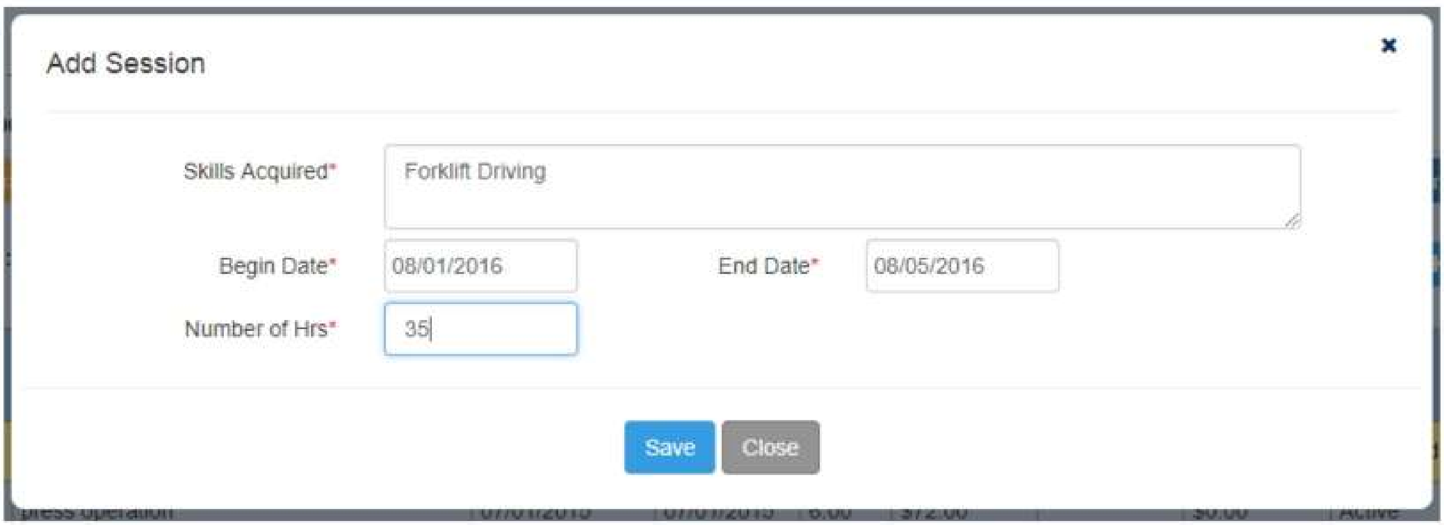
When it is approved by your DBR consultant, the box under the green check will be filled and the session is highlighted grey.



Check the box(es) of the session(s) to be sub-miΣed, then click 'Submit Session for Approval'

Entering On-the-Job Training information—New Jobs Fund (260E)



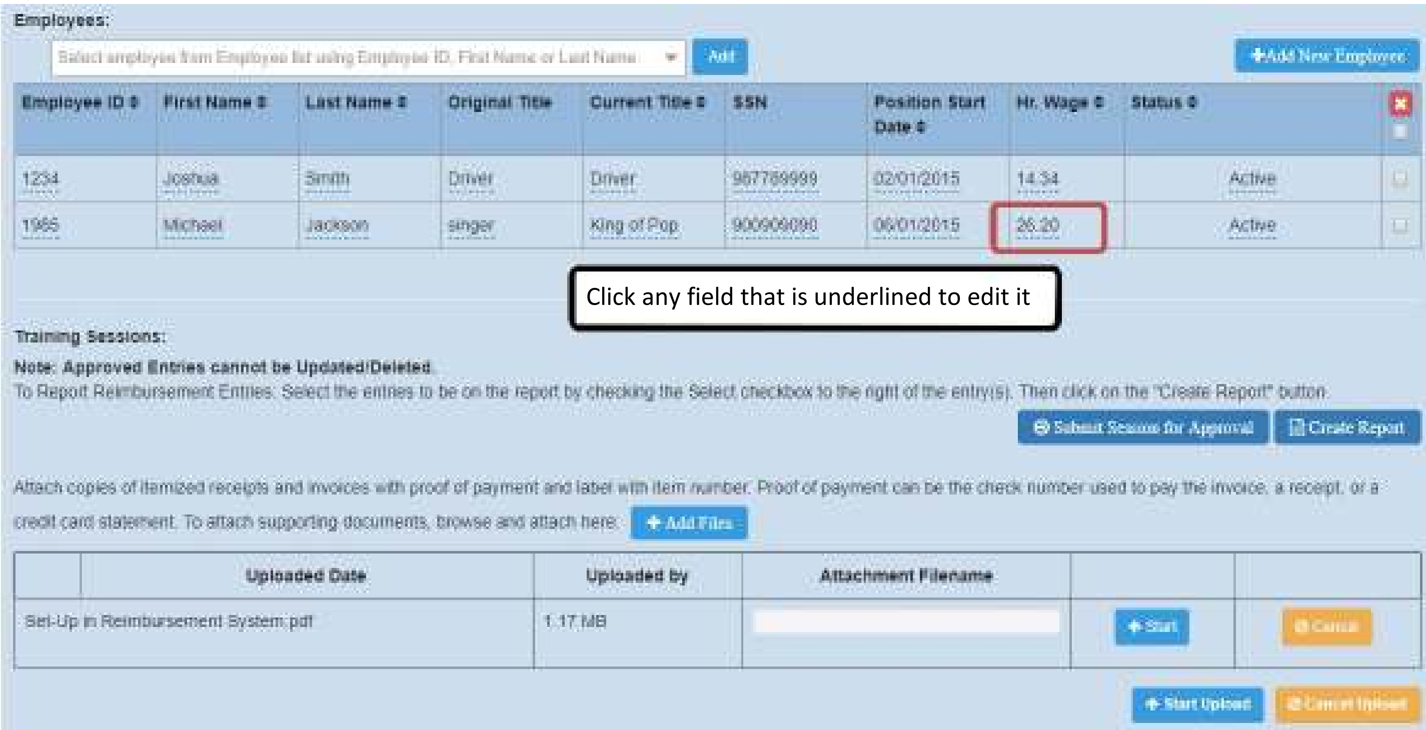


Click ‘Add Session Row’ to start an OJT session for one or multiple employees.

A dialogue box will open

Fill in general information that would apply to a single OJT session and click ‘Save’

Entering On-the-Job Training information...continued



Employees:

Select employee from Employee list using Employee ID, First Name or Last Name | Add | +Add New Employee

Employee ID	First Name	Last Name	Original Title	Current Title	SSN	Position Start Date	Hr. Wage	Status	
1234	Joshua	Smith	Driver	Driver	987789999	02/01/2015	14.34	Active	
1966	Michael	Jackson	singer	King of Pop	900909090	06/01/2015	26.20	Active	

Click any field that is underlined to edit it

Training Sessions:

Note: Approved Entries cannot be Updated/Deleted.

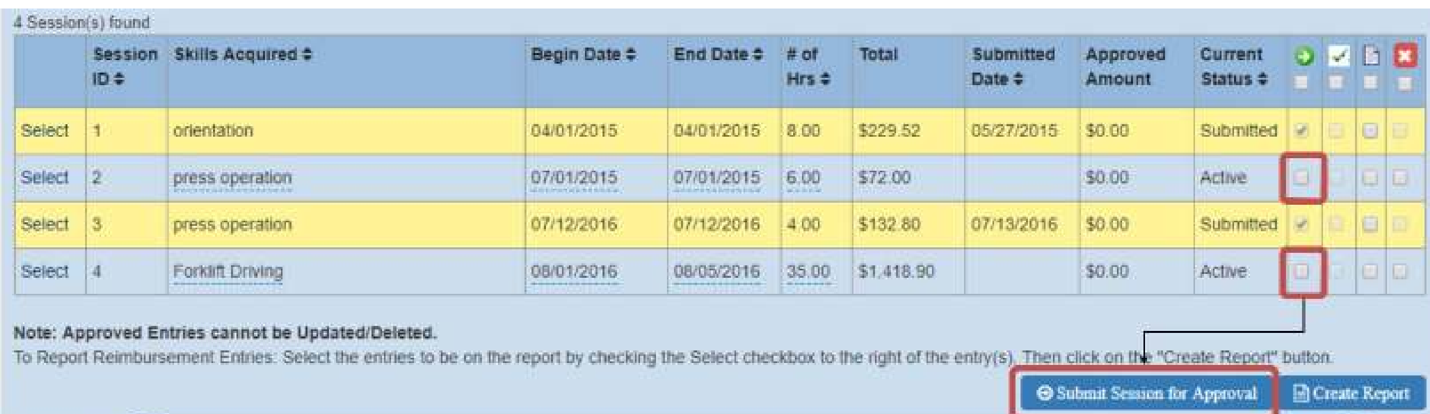
To Report Reimbursement Entries: Select the entries to be on the report by checking the Select checkbox to the right of the entry(s). Then click on the "Create Report" button.

Submit Session for Approval | Create Report

Attach copies of itemized receipts and invoices with proof of payment and label with item number. Proof of payment can be the check number used to pay the invoice, a receipt, or a credit card statement. To attach supporting documents, browse and attach here: + Add Files

	Uploaded Date	Uploaded by	Attachment Filename		
	Set-Up in Reimbursement System.pdf	1.17 MB		Start	Cancel

Start Upload | Cancel Upload



4 Session(s) found

	Session ID	Skills Acquired	Begin Date	End Date	# of Hrs	Total	Submitted Date	Approved Amount	Current Status
Select	1	orientation	04/01/2015	04/01/2015	8.00	$229.52	05/27/2015	$0.00	Submitted
Select	2	press operation	07/01/2015	07/01/2015	6.00	$72.00		$0.00	Active
Select	3	press operation	07/12/2016	07/12/2016	4.00	$132.80	07/13/2016	$0.00	Submitted
Select	4	Forklift Driving	08/01/2016	08/05/2016	35.00	$1,418.90		$0.00	Active

Note: Approved Entries cannot be Updated/Deleted.

To Report Reimbursement Entries: Select the entries to be on the report by checking the Select checkbox to the right of the entry(s). Then click on the "Create Report" button.

Submit Session for Approval | Create Report

In the Employee section, add all employees who participated in that OJT session.

Fill in Employee wage information. The session total will be calculated after entering each employee's hourly wage.

Attach files for supporting training information and financial documentation for each session prior to submitting that session. All attached documentation is listed per session.

When ready to submit for reimbursement, check the green arrow box and click 'Submit for Approval'. The session then changes from blue to yellow. **NOTE:** Once submitted, you are unable to make any changes to that session.

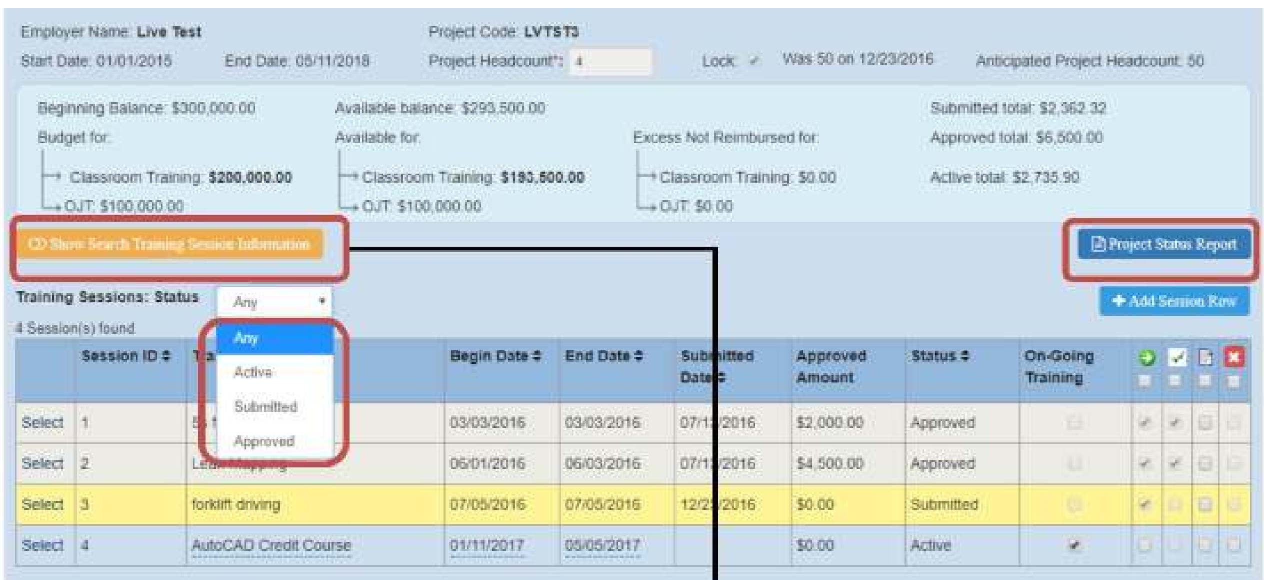
When it is approved by the DBR consultant, the box under the green check will be filled and the session is highlighted grey.

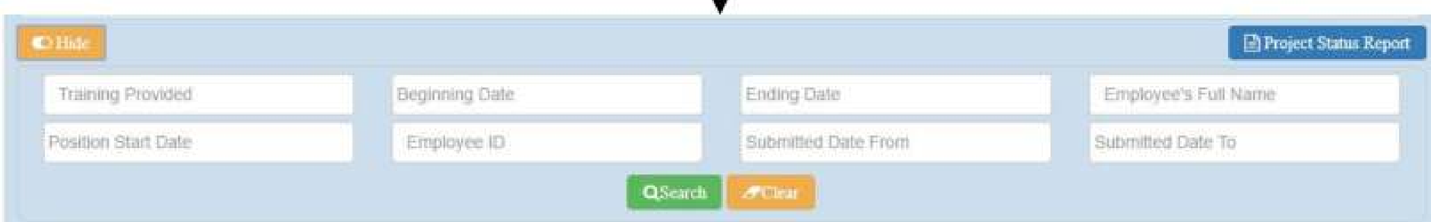
NOTE: The system will time-out after 20 minutes. You will receive a warning.

Information about your Project—Project Status and Viewing Sessions

Use the Dashboard for your project balances at a glance.

You can create a savable/ printable Project Status Report using the button to save the information at this moment in time.



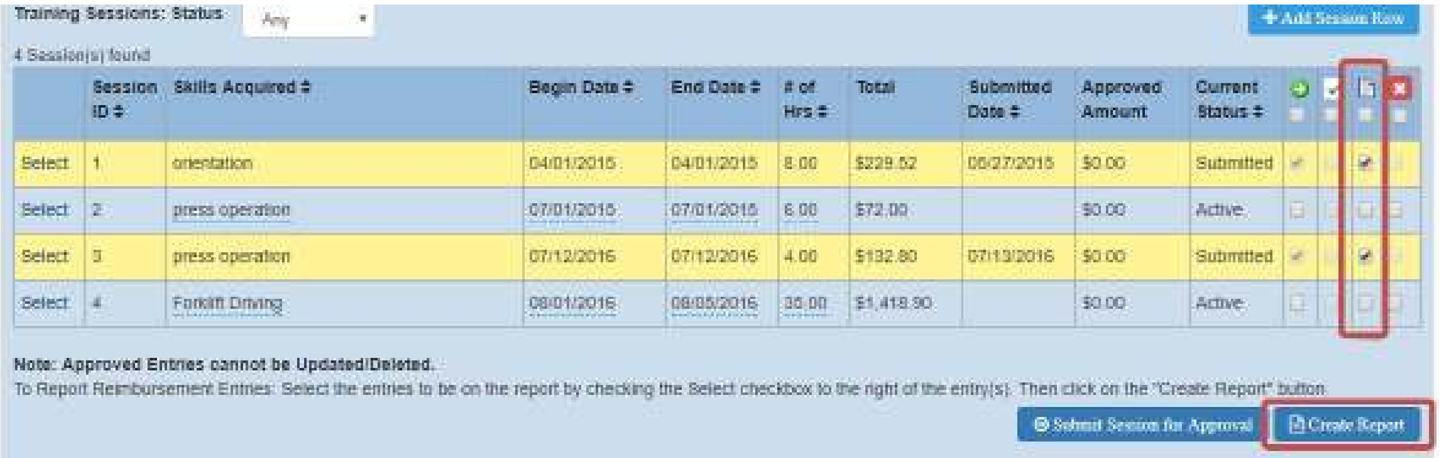


You can view previous sessions by their status.

Search Feature: Open hidden search feature to search sessions by date range of training, employees in the sessions, or date range submitted.

Information about your Project—Creating a Report

A printer-friendly version of all entered information



Training Sessions: Status Any

4 Session(s) found

	Session ID	Skills Acquired	Begin Date	End Date	# of Hrs	Total	Submitted Date	Approved Amount	Current Status
Select	1	orientation	04/01/2015	04/01/2015	8.00	$229.52	05/27/2015	$0.00	Submitted
Select	2	press operation	07/01/2015	07/01/2015	6.00	$72.00		$0.00	Active
Select	3	press operation	07/12/2016	07/12/2016	4.00	$132.80	07/13/2016	$0.00	Submitted
Select	4	Forklift Driving	08/01/2016	08/05/2016	36.00	$1,418.90		$0.00	Active

Note: Approved Entries cannot be Updated/Deleted.

To Report Reimbursement Entries: Select the entries to be on the report by checking the Select checkbox to the right of the entry(s). Then click on the "Create Report" button.

Submit Session for Approval | Create Report

You may create reports on any session at any point in the process.

Choose the session(s) you'd like.

Check the box(es) under Report and click the 'Create Report' button.

You may open or save the report for your records.

Structured OJT Training Claim Report

Employer Name: Live Test

Address:

Vendor ID: 000000000

Vendor Code:

Attention To:

Project Code: LVTST3

Project: 3

Project Headcount: 4

Beginning Balance: $300,000.00

Available Balance: $293,500.00

Approved Total: $6,500.00

Active Total: $2,735.90

Funding Type: 260E

Multiple Number: 0

OJT Beginning Balance: $100,000.00

OJT Submitted Total: $362.32

OJT Excess Not Reimbursed: $0.00

OJT Approved Total: $0.00

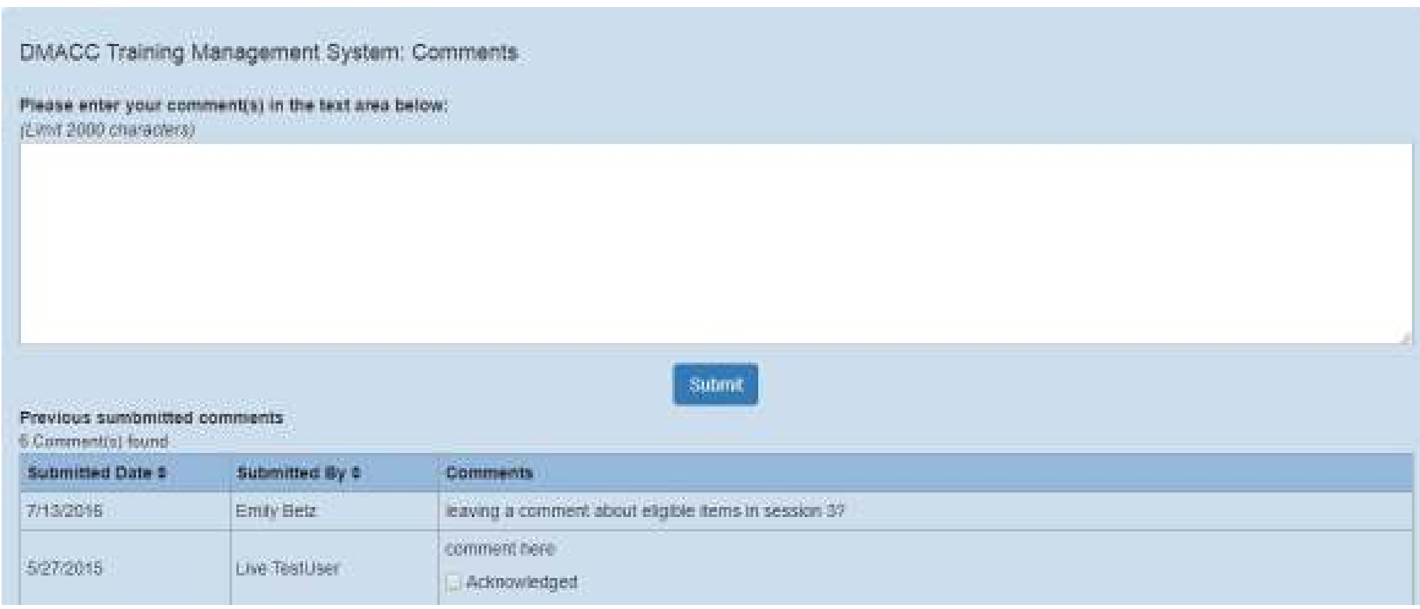
OJT Reimbursement Amount: $0.00

OJT Active Total: $1,490.90

Session ID	Begin Date	End Date	Skills Acquired	# of hours	Name	Employee ID	Hourly wage	Total Cost	Submitted Date	Excess Not Reimbursed	Approved Amount
1	04/01/2015	04/01/2015	orientation	8.00	Jack Smith Jane Smith Joshua Smith	4321 2345 1234	$9.24 $10.21 $9.24	$229.52	05/27/2015	$0.00	$0.00
3	07/12/2016	07/12/2016	press operation	4.00	Jane Smith Joshua Smith	2345 1234	$18.33 $14.87	$132.80	07/13/2016	$0.00	$0.00
							Totals:	$362.32		$0.00	$0.00

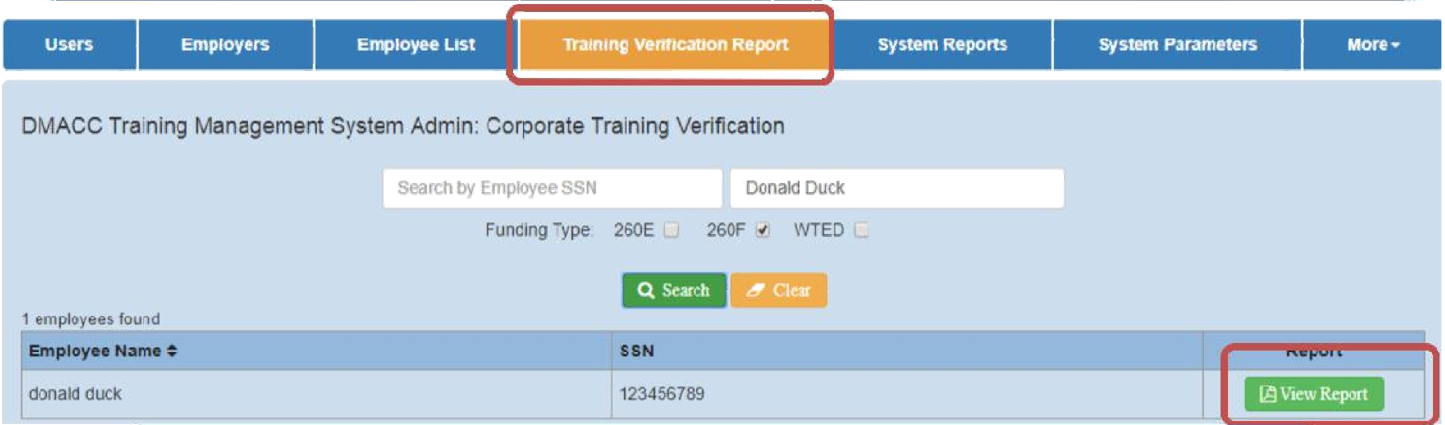
Comments or Notes

You may leave notes in the system for your consultant or for technical help.
Notes and responses will be archived below by date.



Training Verification Report

Approvers and Administrators may create Training Verification Reports for individual employees. Enter name or SSN, funding type, and search to create the report.



Training Verification Reports show **only** the training that has been approved by the Business Consultant. Any training that is still 'Active' or 'Submitted' will not show on the report. The report can be viewed on screen or saved/printed as PDF.