



OKLAHOMA
Employment Security Commission

EmployOklahoma Handbook

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STEVENS AMENDMENT: Oklahoma Works programs and services are administered by the Oklahoma Employment Security Commission under the Workforce Innovations and Opportunity Act and are 100% funded by the United States Department of Labor Employment and Training Administration (USDOL/ETA) through awards totaling \$17,639,410.

EQUAL OPPORTUNITY AND NONDISCRIMINATION STATEMENT: All Recipients, and Sub-recipients must comply with WIOA’s Equal Opportunity and Nondiscrimination provisions which prohibit discrimination on the basis of race, color, religion, sex, national origin (including limited English proficiency), age, disability, political affiliation or belief, or, for beneficiaries, applicants, and participants only, on the basis of citizenship status or participation in a WIOA Title-I financially assisted program or activity.

INQUIRIES: For any questions or concerns related to this issuance, please begin by submitting a [Technical Assistance Request](#). If additional clarification is needed after your request has been reviewed, you may email WorkforceServices.Inquiry@oesc.ok.gov.

CHAPTER 1 — INTRODUCTION & AUTHORITY

This handbook consolidates EmployOklahoma Workforce System Technical Assistance (WSTA) guidance into a single operational reference document.

The handbook is intended to support:

- system navigation,
- case management activities,
- enrollment processing,
- documentation procedures,
- and workforce system data entry activities within EmployOklahoma.

1.1 Applicability

This handbook applies to authorized EmployOklahoma users, including:

- Workforce Development Board staff,
- Service Provider staff,
- OESC staff,
- DVOP Specialists,
- Training Providers,
- and other approved system users.

1.2 Source Guidance

The procedures contained within this handbook are derived from:

- Workforce System Technical Assistance (WSTA),
- Workforce System Directives (WSD),
- Workforce Innovation and Opportunity Act (WIOA) requirements,
- and associated federal and state workforce guidance.

SECTION I — INTAKE & ELIGIBILITY

Chapter 2 — Registration & Eligibility

This chapter provides guidance on Title I Registration and Eligibility procedures in EmployOklahoma

2.1 Job Seeker Registration

Before receiving services from any program, jobseekers should register on the Jobseeker Portal of EmployOklahoma. This registration provides them with access to valuable resources and ensures their information is available for program eligibility review.

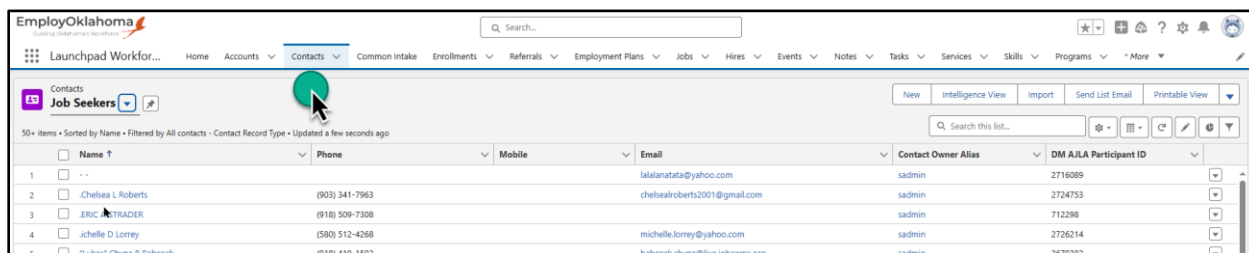
Once registered, the jobseeker's basic contact and demographic information will automatically populate in the Case Manager Portal for eligibility determination.

Case managers must review all demographic information with the jobseeker on the Contact

page to ensure accuracy. Additionally, all data validation and data integrity policies must be followed in accordance with the specific program requirements.

2.2 Demographic Information & Agreement Signatures

Staff can access a list of all jobseekers by navigating to the **“Contacts”** tab and selecting the **“Job Seekers”** list view.



To view a specific jobseeker’s details, click on their Name, which will open their Job Seeker record.

On the Contact page, staff can access key demographic information, including:

- Contact Information
- Address Information
- Registration Information
- Military Connection
- Farmwork
- Employment Status
- Dislocated Worker Details
- Income Information
- Public Assistance Information
- Needs and Barriers
- Account Information
- Job Search Information
- Education/Employment Information

In the Related List Quick Links section, you will find the following functions that might be utilized during the eligibility process:

- List of Eligibilities
- List of Enrollments
- Documents, for uploading documents
- Referrals
- Additional Contact Information
- Job Applications
- Hires
- Employment History

2.3 Determine Eligibility

Staff must review all demographic questions with the jobseeker on the Contact page to gather the necessary information for determining program eligibility. While this provides a basic eligibility assessment, it is crucial to capture all relevant characteristics of the jobseeker to ensure they are considered for all potential programs at intake.

For specific program requirements, staff must follow data validation and data integrity policies in accordance with the program guidelines.

Labor Exchange

If a jobseeker satisfies the criteria below, the system will populate a Labor Exchange eligibility:

- **Age:** 16 years or older

Jobs for Veterans State Grants (JVSG)

If a jobseeker is a veteran and satisfies the criteria below, the system will populate a JVSG eligibility:

**ONLY DVOP Specialist may open a JVSG enrollment and enter enrollment services in the JVSG program.*

- **Age: 16 years or older**
- **Work Eligibility Status:**
 - U.S. Citizen OR
 - Non-Citizen eligible to work in the U.S.
- **Eligible for DVOP Services:**
 - Checked

WIOA Adult Eligibility Requirements

If a jobseeker satisfies the criteria below, the system will populate a WIOA Adult eligibility:

- **Age:** 18 years or older
- **Work Eligibility Status:**
 - U.S. Citizen OR
 - Non-Citizen eligible to work in the U.S.

WIOA Dislocated Worker Eligibility Requirements

If a jobseeker satisfies the criteria below, the system will populate a WIOA dislocated worker eligibility.

- **Dislocated Worker Status:** Select any option except “None of the above.”
- **Local Approval Process:** Based on the type of Dislocated Worker Status selected, staff must verify that the following criteria are answered correctly:
 - Return to Previous Occupation/Industry
 - Displaced Homemaker Status
 - Eligible for Unemployment Benefits or Benefit Exhaustion
 - O*Net Code for the job ending

- Ending Job Wage
- Total Hours Worked
- Date of Employment Dislocation

WIOA Youth Eligibility Requirements

If a jobseeker satisfies the criteria outlined below, the system will populate a WIOA youth eligibility:

In-School Youth Eligibility

If a jobseeker qualifies for the In-School Youth category, if they meet **ALL** the following criteria:

- **Age:** Between 14 to 21 (AND)
- **School Status:**
 - Attending post-secondary education (college, trade school, etc.) **OR**
 - Attending high school, junior high, or elementary school **OR**
 - Attending an alternative school

If the jobseeker qualifies under In-School Youth criteria, the system should allow enrollment creation, if the following condition is satisfied.

- Low Income = Yes **AND** one or more of the following
 - Basic Skills Deficient
 - English Language Learner
 - Justice Involved (Previously in Criminal Justice System)
 - Housing Status = Homeless
 - Runaway Youth
 - Foster Care Youth
 - Pregnant/Parenting Youth
 - Individual with Disability
 - Youth Attending an Underperforming School
 - Youth with an Incarcerated Parent/Guardian
 - Youth with a Parent Who Lacks a Diploma/GED
 - Youth (18-21) with Poor Work History

Out-of-School Youth Eligibility

A jobseeker qualifies for the Out-of-School Youth category if they meet **BOTH** of the following criteria:

- **Age:** Between 16 to 24
- **School Status:**
 - Not attending school, but has a high school diploma, GED, or higher **OR**
 - Not attending school and is a high school dropout **OR**
 - Not attending school but within the age of required attendance.

If the jobseeker qualifies based on Out-of-School Youth criteria above, the system should allow enrollment creation, if they meet at least **ONE** of the following:

- School status at Participation = not attending School or H.S. Dropout

- Justice Involved (Previously in Criminal Justice System)
- Housing Status = Homeless
- Runaway Youth
- Foster Care Youth
- Pregnant/Parenting Youth
- Disabled
- Low Income = **Yes, AND**
 - ☐ Highest level of education completed – High School Graduate or Equivalent **AND**
 - ☐ Basic Skills Deficient (OR) English Language Learner (OR)
- Low Income = **Yes, AND at least one of the following**
 - ☐ Youth Attending or Has Attended an Underperforming School
 - ☐ Youth with an Incarcerated Parent/Guardian
 - ☐ Youth with a Parent Who Lacks Diploma/GED
 - ☐ Youth (18-21) with Poor Work History

2.4 Sending the Demographic Agreement for Signature

1. Completion of Demographic Information

After staff review and complete the jobseeker's demographic information in the case management system, staff must send the Demographic Agreement to the jobseeker for signature.

2. Self-Attestation Requirements

The Demographic Agreement must be self-attested by the jobseeker.

Self-attestation is defined as an electronic signature, verification, or submission of information for specific data element(s) that:

- Is generated directly by the jobseeker; and
- Is traceable to the jobseeker (e.g., email, text message, or e-signature).

All signed or self-attested documentation must be retained in the case management system. Oklahoma's case management system uses Adobe Sign to capture and retain self-attestations for data validation purposes.

3. Demographic Snapshot

At program registration and program entry, a demographic snapshot is captured within the case management system to support data validation requirements.

Program entry is defined as the date the jobseeker has met all programmatic requirements for services that are neither self-service nor information-only, at which point the individual is considered a participant in the applicable program.

4. Maintaining Current Demographic Information

Demographic information must remain current throughout program participation. When demographic information changes:

- Staff must update the contact information section as soon as the change is reported or identified,
- A new Demographic Agreement must be sent for the jobseeker's self-attestation; and
- A **“Contact”** program note must be entered that:
 - Identify the specific changes made; and
 - Records the date the change occurred.

The date of the program note must match the signature date on the updated attestation.

Contact 00623052

Name: Kelly Johnson | Phone: (405) 111-2223 | Email: rileytestrassatt+199@gmail.com | Contact Owner: Kristy Aus...

Related List Quick Links:

Participation Periods (1)	Job Development (0)	Snapshots (5)	Credential/Masurable Skill Gained (8)	UI Claims (0)	Wages & Earnings (0)	Work Experience (1)	Eligibilities (5)	Enrollments (4)
Enrollment Services (10+)	Client Skills (4)	Certifications (1)	Objective Assessments (0)	Employment Plans (2)	Development Needs (0)	Goals (3)	Referrals (0)	Event Attendee Enrollments (0)
Event Attendance Trackings (0)	Saved Job (0)	Job Applications (0)	Search Histories (10+)	Hires (0)	Employment History (1)	Exits (0)	Follow Ups (0)	Notes (2)
Documents (5)	Contact History (2)	External Job Search Activity (1)	AJLA Enrollment Demographic Snapshots (0)	Additional Contact Information (0)	Approval History (0)	TRA Allowances (0)	ITAs (0)	Agreements (Contact) (7)
Entitlement (0)	TAA Impacted Worker (0)	TAA Benefits (0)	Education History (0)	AJLA Legacy Exit Questions Data (0)				

To send the Demographics for Signature:

1. Click the **“Send Demographics for Signature”** button at the top of the Contact page.

EmployOklahoma

Search...

Launchpad Workfor... | Home | Accounts | **Contacts** | Common Intake | Enrollments | Referrals | Employment Plans | Jobs | Hires | Events | Notes | Tasks | Services | Skills | Programs | More

Contact 00623052

Name: Kelly Johnson | Phone: (405) 111-2223 | Email: rileytestrassatt+199@gmail.com | Contact Owner: Kristy Aus... | **Send Demographics for Signature** | View Customer User | Log in to Experience as User

Related List Quick Links:

Participation Periods (1)	Job Development (0)	Snapshots (4)	Credential/Masurable Skill Gained (5)	UI Claims (0)	Wages & Earnings (0)	Work Experience (1)	Eligibilities (4)	Enrollments (3)
Enrollment Services (10+)	Client Skills (4)	Certifications (1)	Objective Assessments (0)	Employment Plans (2)	Development Needs (0)	Goals (3)	Referrals (0)	Event Attendee Enrollments (0)

My Job Matches

2. Select all programs that require a signature and click **“Next”** twice.

Send Demographics for Signature

*Select Program

WIOA Adult

WIOA Youth

Labor Exchange

Complete this field.

Next

[ctions \(1\)](#)
[Objective Assessments \(0\)](#)
[Employment Plans \(2\)](#)
[Development Needs \(0\)](#)
[Goals \(3\)](#)
[Referrals \(0\)](#)

Show All (41) ✕

Send Demographics for Signature

Selected Program Names: WIOA Adult

[Previous](#)
[Next](#)

100.00% | High School Diploma or Equivalent

3. An Adobe document will be sent to the jobseeker's registered email.
4. The jobseeker must electronically sign the document upon receiving the email.
5. After the jobseeker signs, the case manager will receive an email notification with the signed document.
6. The case manager must then electronically sign the document from their email and submit it for signature.
7. Once fully signed, the Demographic Agreement will be automatically uploaded into the Agreements section of the jobseeker's contact record.

▼ Contact Information

Participant ID	00623052	Email	rileytestrassatt+199@gmail.com
Birthdate	1/12/2007	Unique ID SSN	
Name	Kelly Johnson	Other Phone	(123) 456-7890
Phone	(405) 111-2223	MCI Number	
Date of Last Contact	2/20/2025	Account Name	OESC Job Seekers
Case Number		MSFW Flag	
Area/County of Service		Contact Record Type	Job Seeker
Date of Intake	1/12/2025	Contact Owner	Kristy Austin
Email Opt Out	☐	Work Email	
TP Acknowledge	☐	BYB date	
Approaching Common Exit Date	4/30/2025	Last Resume Update	
Basic Skills Deficient	Yes	Active	Yes
Low Levels of Literacy	No	Age	18
Parent/Guardian Name		Agency Code	
Preferred Method of Contact	Text Message	Parent/Guardian Phone	
# of Active Participation Periods	1	Resume	
DM AILA Participant ID		# of Dependents Under 18	
5% Youth Criteria Test		What brings you into an AJC today?	

▼ Address Information

We found no potential duplicates of this Contact.

Agreements (Contact) (7)

Adobe Acrobat Sign Agreement	Date Sent (Date): 1/14/2025	Date Signed:	Agreement Status: Out for Signature
Adobe Acrobat Sign Agreement	Date Sent (Date): 1/14/2025	Date Signed:	Agreement Status: Out for Signature
Adobe Acrobat Sign Agreement	Date Sent (Date): 1/27/2025	Date Signed: 1/27/2025, 2:50 PM	Agreement Status: Signed
Adobe Acrobat Sign Agreement	Date Sent (Date): 1/27/2025	Date Signed: 1/27/2025, 2:37 PM	Agreement Status: Signed
Adobe Acrobat Sign Agreement	Date Sent (Date):	Date Signed:	Agreement Status: Send in Progress
Adobe Acrobat Sign Agreement	Date Sent (Date):	Date Signed:	Agreement Status: Send in Progress
Adobe Acrobat Sign Agreement	Date Sent (Date):	Date Signed:	Agreement Status: Send in Progress

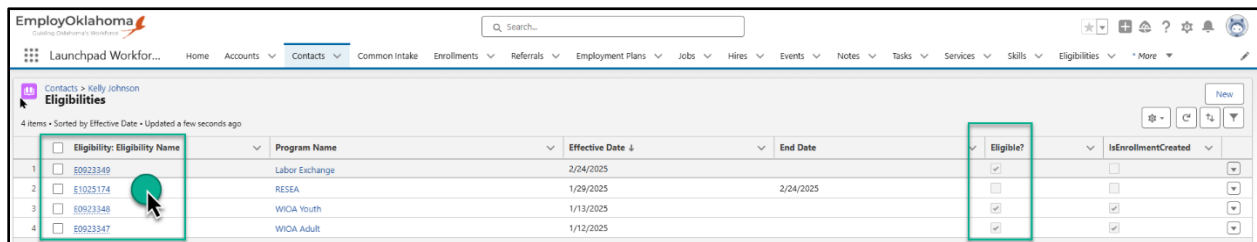
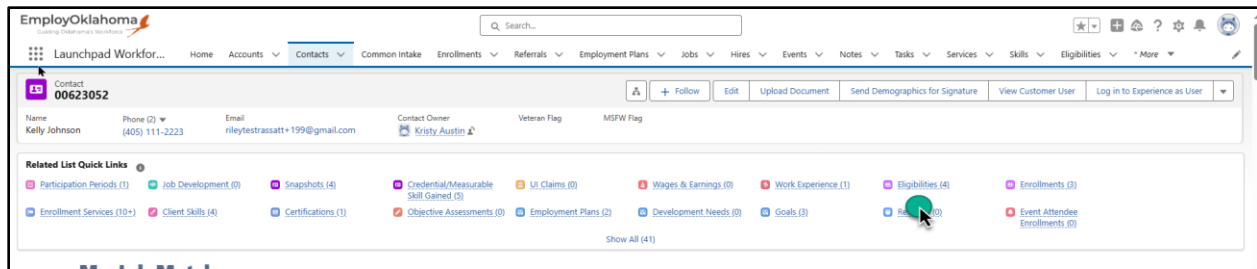
[View All](#)

2.5 Eligibility and Enrollment Submission

To review and submit a jobseeker's eligibility for various programs, follow these steps:

1. Access Eligibility Information

- Navigate to the Related List Quick Links section
- Select **"Eligibilities"** to view the list of programs the jobseeker is eligible for.
- Click the Eligibility Name of the program you want to review and submit for approval.

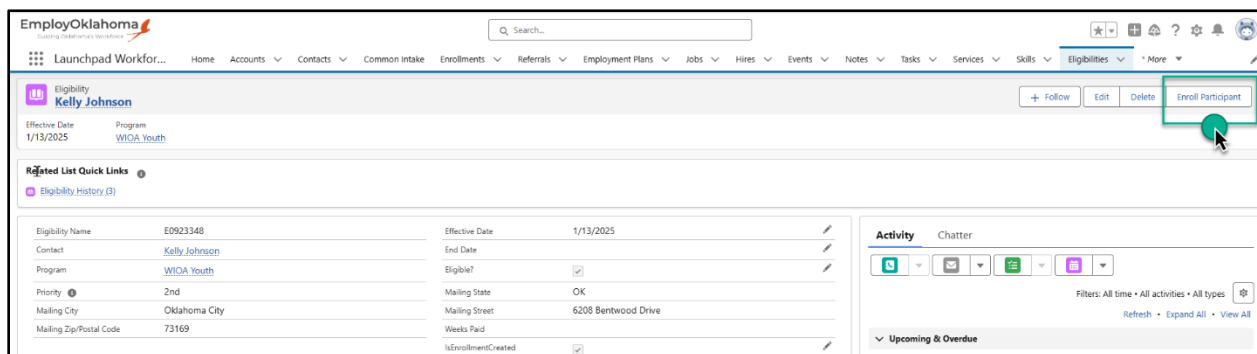


2. Enroll the Jobseeker in a Program

- Click the “Enroll Participant” button from the selected Eligibility record to register the jobseeker in the corresponding program.

3. Verify Enrollment Details

- A pop-up alert will appear, confirming that all jobseeker details have been verified and are accurate.
- The system will also indicate whether any jobseeker details have been added or modified today.



4. Complete Program-Specific Questions

- A set of program-specific questions will be displayed.
- Ensure all required questions are answered before proceeding.

5. Enrollment Confirmation

- Once the responses are submitted, you will receive a pop-up confirmation that the jobseeker has been successfully enrolled in the selected program.

6. Provide Services

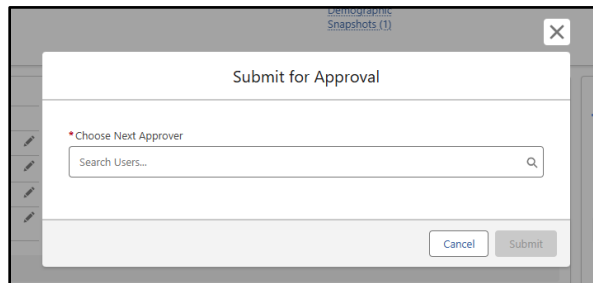
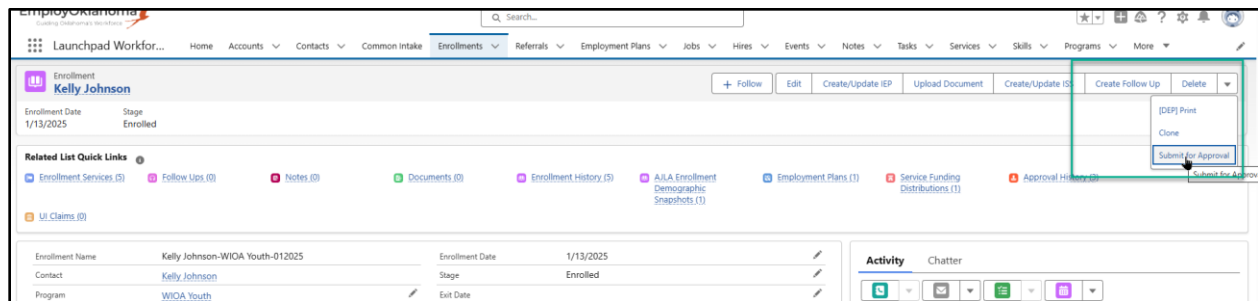
- Title III program Case managers may begin providing enrollment services to the jobseekers and documenting in the applicable program. WIOA Title I program Case managers must move through the approval process outlined below.

2.6 Approval Process for WIOA Title I Enrollments

For WIOA Adult, Dislocated Worker, and Youth program enrollments, a two-level approval process is available.

Enrollment Submission & Initial Approval

1. When an enrollment is created, the Stage field is automatically set to **“Pending Approval.”**
2. The case manager who initiated the enrollment must start the approval process by clicking **“Submit for Approval”** and manually selecting the approver.



Two-Level Approval Requirements

- A two-level approval is required when the case manager has been employed for less than 60 days.
- This requirement can be bypassed if the locally selected approver assigns the second approval to themselves.

Approval Timelines & Staffing Considerations

- Local boards and/or service providers must establish and document an approval procedure to ensure the following:
 - Enrollments are approved within a time frame that does not delay continued service provision and add additional barriers to the jobseeker.
 - Staffing absences must not cause delays in approvals or disrupt jobseeker services.

- Sufficient staff must be available to process enrollments promptly.

2.7 Finalizing Enrollment

- Once the enrollment is approved, the Stage field updates from **“Pending Approval”** to **“Enrolled.”**
- The case manager can then begin providing services to the jobseeker.

The screenshot displays the enrollment record for Kelly Johnson. The record is titled "Enrollment Kelly Johnson" and shows the enrollment date as 1/13/2025 and the stage as "Enrolled". The "Stage" field is highlighted with a green box. The record includes fields for Contact (Kelly Johnson), Program (WIOA Youth), Case Manager (Kristy Austin), Office (Okla Works - American Job Center - Chandler), and Date of Last Reportable Individual Svc (2/3/2025). It also shows enrollment snapshot details, system information, and a list of related quick links like Enrollment Services, Follow Ups, Notes, Documents, Enrollment History, A/LA Enrollment Demographic Snapshots, Employment Plans, Service Funding Distributions, and Approval History. An activity log on the right shows a meeting and a call.

2.8 Labor Exchange and Jobs for Veterans State Grants (JVSG) Enrollment Procedures for DVOP's

- 1. Create JVSG Enrollment**
Once a JVSG enrollment is created, the DVOP specialist must check if there is an open LE enrollment.
- 2. Create LE Enrollment (if needed)**
If an open LE Enrollment does not exist, the DVOP must create one.
- 3. Enter Assessments on Both Enrollments**
When the LE enrollment is created by the DVOP, they must enter the Comprehensive and Specialized Assessment service on both the JVSG and the LE enrollments.
- 4. Use JVSG enrollment for all ongoing services**
After this, the DVOP will use the JVSG enrollment for all ongoing services and documentation.

2.9 Documenting Registered Apprentices

When a contact is identified as a registered apprentice through a Department of Labor Registered Apprenticeship Program (RAP) record the apprenticeship start date, entry wage, and RA Number on the contact page using the fields below.

- Are you a Registered Apprentice?
- Date Started RA Program
- Wage at Entry into Apprenticeship

- What is your RA Number? (**MUST** be 12 characters in length, following a similar format as the example below)

Are you a Registered Apprentice? ⓘ	
Yes	
Date Started RA Program ⓘ	
8/28/2025	
Wage at Entry into Apprenticeship ⓘ	
\$21.50	
What is your RA Number? ⓘ	
OK2025001234	

Department of Labor RAPs must provide RAPIDS documentation reflecting a snapshot of the individual's profile (e.g., name, approval status, RA program name, RA Number, program start date, exit date).

When a contact is identified as a registered apprentice through a CareerTech Apprenticeship (CTA), record the apprenticeship start date, and entry wage. (**DO NOT** enter information in the RA Number field)

Are you a Registered Apprentice? ⓘ	
Yes	
Date Started RA Program ⓘ	
8/28/2025	
Wage at Entry into Apprenticeship ⓘ	
\$21.50	
What is your RA Number? ⓘ	



CTAs must provide a fully signed CareerTech Apprenticeship Agreement that includes the individual's name, start date, end date, beginning wage, and CTIMS contract number.

These fields must be completed, and proper documentation must be obtained from the RAP/CTA Provider and uploaded to EmployOklahoma prior to entering enrollment services.

Note: The date entered in the "Date Started RA Program" field must reflect the same date on the RAPIDS or CareerTech Apprenticeship Agreement documentation.

Chapter 3 — Low Income Determination

Chapter 3 provides guidance for determining low-income calculation and input in EmployOklahoma.

WIOA Section 3(36) defines a low-income individual as an individual who:

- a. Receives, has received in the past six (6) months, or is a member of a family that is receiving or has received in the past six (6) months, assistance through:
 - The Supplemental Nutrition Assistance Program (SNAP);
 - Temporary Assistance for Needy Families (TANF) programs;
 - The Supplemental Security Income (SSI) program; or
 - State or local income-based public assistance.
- b. Is a homeless individual, as defined in the Violence Against Women Act, or the McKinney Vento Homeless Assistance Act (includes an individual who is “couch surfing” or has a temporary residence);
- c. Receives or is eligible to receive a free or reduced-price lunch under the Richard B. Russell National School Lunch Act;
- d. Is a foster child on behalf of whom State or local government payments are made; or
- e. Is in a family with a total family income that does not exceed the higher of:
 - 70 percent of the Lower Living Standard Income Level (LLSIL); or
 - The Lower Living Standard (LLS)/Poverty Level. This last criterion is referred to as “income guidelines.”

For the WIOA Youth program, one (1) additional low-income criterion is that the individual is living in a High Poverty area.

3.1 Correct Calculation Window

Use 6 months of actual income. Then annualize it (multiply by 2) before comparing it to the 12-month LLSIL or poverty guideline, whichever is greater. The data you collect is 6 months, but the threshold you compare to is based on a 12-month annual standard.

Example Calculation

Let’s say an applicant has a family of 3 in the Oklahoma City MSA.

- 6-month Total Includable income = \$15,500
- Total Income (Annualized) = $\$15,500 \times 2 = \$31,000$

Then you compare \$31,000 to the LLSIL annual figure for a family of 3 in that MSA (say, \$40,280).

Since $\$31,000 < \$40,280$, the individual meets the low-income criteria.

3.2 Step-by-Step Programmatic “How-To” for EmployOklahoma

Step 1. Determine the family size of the customer.

Family is defined as two (2) or more people related by blood, marriage, or decree of court, who are living in a single residence, and are included in one (1) or more of the following categories:

- A married couple and dependent children;
- A parent or guardian and dependent children; or
- A married couple (WIOA 20 CFR 675.300).

**For Youth participants and a broader definition of “family”, reference the WIOA Youth Policy.*

Income Totals		
Family Size	3	
100% Poverty Level for Family Size	\$26,650	
70% LLSIL for Family Size	\$27,448	

Step 2: Gather income documentation (Includable & Excludable Income)

Collect all earned and unearned income documentation, as required by the current data validation policy, for the 6 months immediately preceding the application date for all family members.

- Use gross income of the individual and all family members to determine individual and family income. Include wages, unemployment insurance benefits, child support payments, and old-age survivors' insurance benefits in the customer's income calculations. **Reference the Data Validation and Source Documentation Policy for a complete list of Includable and Excludable income types.*
- If the customer is an individual with a disability, only count their individual income, not the income of their family.

Add amounts in the applicable sections on the Contact page under the Includable & Excludable Income sections.

Includable

Includable Forms of Income		
JS: Amount earned before taxes? ⓘ \$10,000		Family: Amount earned before taxes? ⓘ \$2,000
JS: State & federal UI income? (WIOA) ⓘ		Family: State & federal UI income? (WIOA) ⓘ
JS: Net receipts from self-employment ⓘ		Family: Net receipts from self-employment ⓘ
JS: Received from OASI (WIOA Adult) ⓘ		Family: Received from OASI (WIOA Adult) ⓘ
JS: Farm self-employment amount? ⓘ		Family: Farm self-employment amount? ⓘ
JS: Amt received from RR, union, comp, stip ⓘ		Fam: Amt received from RR, union, comp, stip ⓘ
JS: Amount received from alimony ⓘ		Family: Amount received from alimony ⓘ
JS: Military family support ⓘ		Family: Military family support ⓘ
JS: Amount received from child support ⓘ \$3,500		Fam: Amount received from child support ⓘ

Excludable

Excludable Forms of Income		
JS: Amount received from SSI ⓘ		Family: Amount received from SSI ⓘ
		\$7,200
JS: Amount from needs-based scholarships ⓘ		Fam: Amount from needs-based scholarships ⓘ
\$4,000		
JS: Payment received from Title IV ⓘ		Family: Payment received from Title IV ⓘ
JS: Amount received from welfare payment ⓘ		Fam: Amount received from welfare payment ⓘ

Step 3: Total the 6-month income (Income Totals)

Add wages together and document in applicable sections.

- Includable Individual Income
- Includable Family Income
- Total Includable Income (Includable Individual Income + Includable Family Income)
- Excludable Individual Income
- Excludable Family Income
- Total Excludable Income (Excludable Individual Income + Excludable Family Income)

Income Totals		
Family Size		Region Name
3		Central
70% LLSIL for Family Size		100% Poverty Level for Family Size
\$27,448		\$26,650
100% LLSIL for Family Size		125% Poverty Level for Family Size
\$39,212		
Includable Individual Income ⓘ		Family Self-Sufficiency Income Level ⓘ
\$13,500		
Includable Family Income ⓘ		Excludable Individual Income ⓘ
\$2,000		\$4,000
Total Includable Income ⓘ		Excludable Family Income ⓘ
\$15,000		\$7,200
Total Income ⓘ		Total Excludable Income ⓘ
\$31,000		\$11,200

Step 4: Annualize the income (Total Income)

Multiply the 6-month total by 2 to project a 12-month annual income and enter the total income.

Income Totals		
Family Size		Region Name
3		Central
70% LLSIL for Family Size		100% Poverty Level for Family Size
\$27,448		\$26,650
100% LLSIL for Family Size		125% Poverty Level for Family Size
\$39,212		
Includable Individual Income ⓘ		Family Self-Sufficiency Income Level ⓘ
\$13,500		
Includable Family Income ⓘ		Excludable Individual Income ⓘ
\$2,000		\$4,000
Total Includable Income ⓘ		Excludable Family Income ⓘ
\$15,000		\$7,200
Total Income ⓘ		Total Excludable Income ⓘ
\$31,000		\$11,200

Step 5: Poverty Guidelines and LLSIL

Use the Current Oklahoma Poverty Guideline Policy to determine income levels.

Determine the appropriate income area (i.e. non metro, metro) based on county of residence. Review the dollar amounts under HHS Poverty Guidelines and the 70% LLSIL for the jobseeker's family size and metropolitan area. Enter the Select the income amounts in the appropriate fields.

- 100% Poverty Level for Family Size
- 70% LLSIL for Family Size

Income Totals	
Family Size	3
100% Poverty Level for Family Size	\$26,650
100% LLSIL for Family Size	\$39,212
Region Name	Central
70% LLSIL for Family Size	\$27,448
125% Poverty Level for Family Size	

Step 6: Determine Low Income Status

To determine the low-income status, compare the Total Income to the 12-month LLSIL or poverty guideline, whichever is greater. If the customer's total income is higher, then the customer is not low-income based on WIOA income guidelines.

- Select No in the Low-Income field.

Low Income Information	
Low Income	No

If the customer's Total Income is at or below the higher of the two thresholds, then the customer is considered low-income based on WIOA income guidelines.

- Select “Yes” in the Low-Income field
 - If the selected higher income amount was 70% LLSIL, then in EmployOklahoma:
 - Select Yes in the 70% LLSIL Income drop-down field; and
 - Select No in the Lower Living Standard drop-down field.
 - If the selected higher income amount was LLS/Poverty Level, then in EmployOklahoma:
 - Select No in the 70% LLSIL Income drop-down field; and
 - Select Yes in the Lower Living Standard drop-down field.

Low Income Information		annual income that exceeds the low income requirements?	
Low Income	Yes	Disabled, low family income, not eligible?	1
Residential Area Poverty Level	High Poverty	Single Parent	No
Low Income Eligible - Below 70% LLSIL	Yes	# of Children (Under 18)	2
Low Income Eligible - Below Poverty Line	Yes	Received income assistance in recently?	1
Not Self-Sufficient	Yes	Family income below poverty line lately?	1
ETA 802: Low Income Status Formula	1	Family income < 70% LLSIL in 6 months?	1
ETA 802: Low Income Status Helper	0		

Step 7. Double-check the accuracy of the data entry and ensure that all documentation is uploaded.

- If the customer does not provide any income information, select Not Disclosed for both fields and record a case note.

Chapter 4 — Enrollment Service Entry

This chapter provides guidance on enrollment service entry in EmployOklahoma.

All enrollment-related services must be entered from the **“Enrollment”** section of the system.

- To enter a Career Service, use the **“Service Entry”** button.
- To enter a Training Service, use the **“Training Service Entry”** button.

These allow you to record the services a participant is receiving as part of their enrollment.

Follow the steps below to complete each type of entry.

4.1 Entering a Career Service

1. Click the **“Service Entry”** button

2. Complete the following fields:

- Service Delivery Method
- Stage
- Projected Start Date
- Projected End Date
- Actual Start Date (if applicable)

- Actual End Date (if applicable)
- Select the Career Service from the list

Service Entry

* Service Delivery Method: --None--

* Stage: Successfully Completed

Projected Start Date: [Calendar Icon]

Projected End Date: [Calendar Icon]

Actual Start Date: Mar 19, 2025 [Calendar Icon]

Actual End Date: [Calendar Icon]

Select Services
49 of 49 items • 0 items selected

Search this list...

Service Name	DOL Category of Service	Delivery Type	Triggering Service
☐ Career Planning	Individualized Career Service	Staff Assisted	Starts and Extends
☐ Comprehensive and Specialized Assessments	Individualized Career Service	Staff Assisted	Starts and Extends
☐ Development of Individual Employment Plan (IEP)	Individualized Career Service	Staff Assisted	Starts and Extends
☐ English Language Education and Training Programs	Individualized Career Service	Staff Assisted	Starts and Extends
☐ Financial Literacy Services	Individualized Career Service	Staff Assisted	Starts and Extends
☐ Follow Up Services	Follow Up Service	Staff Assisted	Neither Starts or Extends
☐ Group Counseling	Individualized Career Service	Staff Assisted	Starts and Extends
☐ Incumbent Worker Training	Individualized Career Service	Staff Assisted	Neither Starts or Extends

Save

3. Click “Save”

4.2 Entering a Training Service

1. Click the “Training Service Entry” button.

Enrollment Kelly Johnson

+ Follow Edit Service Entry **Training Service Entry** Create/Update IEP

Enrollment Date: 1/12/2025 Stage: Enrolled

Related List Quick Links

- Enrollment Services (10+)
- Follow Ups (0)
- Notes (1)
- Documents (4)
- Enrollment History (5)
- A/JLA Enrollment Demographic Snapshots (1)
- Employment Plans (1)
- Service Funding Distributions (7)
- Appr...
- UI Claims (0)

2. Complete the following fields:

- Stage
- Training Provider
- Service Delivery Method
- Projected Start Date
- Projected End Date
- Actual Start Date (if applicable)
- Actual End Date (if applicable)

Training Service Entry

*Stage
--None--

*Training Provider
Search Accounts...

Projected Start Date

Actual Start Date

*Training Program
Search Training Programs...

*Service Delivery Method
--None--

Projected End Date

Actual End Date

Select Services

11 of 11 items • 0 items selected

Search this list...

Service Name	DOL Category of Service	Delivery Type	Triggering Service
☐ Adult Basic Education in Conjunction with Training	Training Service	Staff Assisted	Starts and Extends
☐ Customized Training	Training Service	Staff Assisted	Starts and Extends
☐ Entrepreneurial Skills Training	Training Service	Staff Assisted	Starts and Extends
☐ Instruction Leading to Recognized Credential or Employment	Training Service	Staff Assisted	Starts and Extends
☐ Job Readiness in Conjunction with Training	Training Service	Staff Assisted	Starts and Extends
☐ Occupational Skills Training	Training Service	Staff Assisted	Starts and Extends

Save

3. Click “Save”.

Completing the Training Service Entry

To complete the training service entry, you must:

1. Click on “Enrollment Services”

Enrollment

Kelly Johnson

Enrollment Date: 1/12/2025 Stage: Enrolled

+ Follow Edit Service Entry Training Service Entry Create

Related List Quick Links

Enrollment Services (10+)

UI Claims (0)

Follow Ups (0)

Notes (1)

Documents (4)

Enrollment History (5)

AJLA Enrollment Demographic Snapshots (1)

Employment Plans (1)

Service Funding Distributions (7)

2. Select the associated enrollment service

Enrollment Services								
11 Items • Sorted by Actual Start Date • Updated a few seconds ago								
☐	Enrollment Service: Enroll...	Service Name	Stage	Actual Start Date	Actual End Date	Service Cost	Staff Member	Enrollment ...
1	☐ ES-4809697	Occupational Skills Training	Scheduled				Connie Frazier	Connie Frazier
2	☐ ES-4786308	Comprehensive and Specialized Assessments	Successfully Completed	1/12/2025	1/14/2025	\$7,000.00	Kristy Austin	Kristy Austin
3	☐ ES-4786309	Development of Individual Employment Plan (IEP)	Proposal	1/12/2025			Kristy Austin	Kristy Austin
4	☐ ES-4786505	Occupational Skills Training	In Progress	1/20/2025		\$1,050.00	Kristy Austin	Kristy Austin
5	☐ ES-4791140	Work Experience	In Progress	1/28/2025		\$5,000.00	Kristy Austin	Kristy Austin
6	☐ ES-4806444	Comprehensive and Specialized Assessments	Successfully Completed	3/7/2025	3/7/2025		Kristy Austin	Kristy Austin
7	☐ ES-4806448	Financial Literacy Services	Successfully Completed	3/7/2025	3/7/2025		Connie Frazier	Connie Frazier
8	☐ ES-4809664	Comprehensive and Specialized Assessments	Successfully Completed	3/13/2025	3/13/2025		Connie Frazier	Connie Frazier
9	☐ ES-4809666	Comprehensive and Specialized Assessments	Successfully Completed	3/13/2025	3/13/2025		Connie Frazier	Connie Frazier
10	☐ ES-4809696	Development of Individual Employment Plan (IEP)	In Progress	3/13/2025			Connie Frazier	Connie Frazier
11	☐ ES-4810112	Career Guidance	Successfully Completed	3/14/2025	3/14/2025		Brent Watson	Brent Watson

3. Complete the following fields:

- Leads to Employment, Credential, or MSG?
- Select results the service may lead to
- O*Net
- CIP Code

Service Information	
Date Relocation allowance approved	Leads to Employment, Credential, or MSG? ☒ Yes
Select results the service may lead to Government license	pre-layoff or pre-separation training? ☐
Do you want taxes withheld from benefits ☐	Agent/Liable State
Reason for Waiver Revocation	Participant group
O*NET 53-3032	CIP Code CIPC-0001529
	Staff Member  Connie Frazier

- Service Cost (Budget)

Budget	
Service Cost \$7,000.00	Amount Unfunded for Service \$7,000.00
Funds Expended \$0.00	

- **Training Provider** – should auto-fill; add if missing
- **Training Program** – should auto-fill; add if missing
- Training service outcome
- Training Enrollment Date
- Is this part-time training?
- Is training lead to associate's degree?
- **Projected Start Date** – should auto-fill; add if missing
- **Projected End Date** – should auto-fill; add if missing
- **Actual Start Date:** Enter the date the training is marked as **"In-Progress."** This should reflect the first day the jobseeker attends training.
- **Actual End Date:** Enter the last date the jobseeker attended training or the date all the training requirements were completed as defined by the training syllabus.

Training Service Details	
Training Provider American Truck Training	Training Program CDL Training and Certification
Training Service Outcome License Recognized by the State Involved or the Federal Government	Training Enrollment Date 3/13/2025
Is this part-time training? ☐	Date Withdrawn from Training
Is training lead to Associate's degree? ☒	Reason for Training Waiver
AJLA Service Provider Contact	
Scheduling	
Projected Start Date 3/20/2025	Projected End Date 4/24/2025
Actual Start Date	Actual End Date

SECTION II — EMPLOYMENT PLANNING & CASE MANAGEMENT

Chapter 5 — Employment Plans (ISS/IEP)

This chapter provides guidance for local workforce development boards on data mapping for ISS as well as the creation of ISS and IEPs in EmployOklahoma.

5.1 ISS Migrated Data

As part of the transition from OK Job Match to EmployOklahoma, the data for Individual Service Strategies (ISS) for all migrated Youth participants has been moved into the new ISS format. Due to the differences in the ISS layout, this document outlines where the migrated data will be located within the ISS in EmployOklahoma, as well as where to enter the data for enrollment beginning January 1, 2025.

Participants that were enrolled into the youth program prior to January 1, 2025, may have migrated data entered into the ISS according to the following chart.

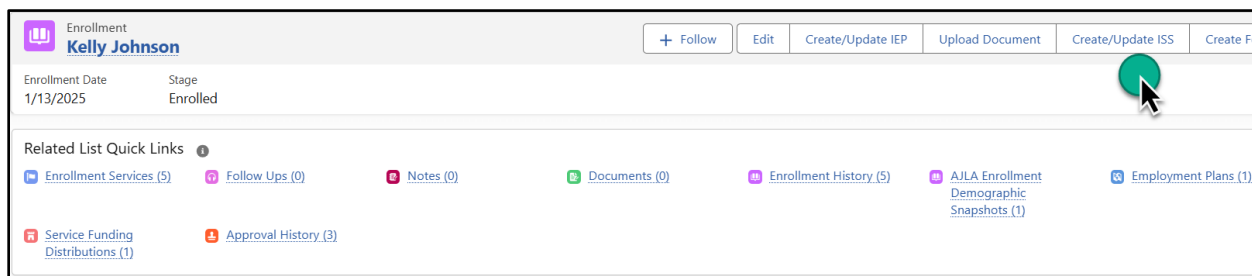
Number	OKJM ISS Fields	EmployOklahoma ISS Fields
1		<i>Tutoring: study skills training and instruction leading to secondary school completion, including dropout prevention strategies</i>
2		<i>Alternative secondary school offerings</i>
3		<i>Activities that help youth prepare for transition to postsecondary education and training</i>
4		<i>Paid and unpaid work experience (summer employment, pre-apprenticeship programs, internships, job shadowing, OJT) with academic and occupational education</i>
5	Comprehensive Objective Assessment and Career Research	<i>Labor market and employment information including career awareness, career counseling, and career exploration services</i>
6		<i>Education offered concurrently with workforce preparation and training for a specific occupation</i>
7	Training Goals and Achievement Objectives	<i>Occupational Skills Training</i>
8		<i>Entrepreneurial skills training</i>
9	Supportive Services Needs	<i>Supportive Services</i>
10		<i>Adult Mentoring</i>
11		<i>Comprehensive Guidance and Counseling (may include alcohol abuse counseling and referral)</i>
12	Follow-Up Services Planned	<i>Follow-Up</i>
13		<i>Leadership development opportunities/Opportunities to develop social behaviors, other soft skills, and</i>

		<i>leadership opportunities</i>
14		<i>Financial Literacy</i>
15	Assistive Technology Needs for Achieving Goals Economic Need Statement and Planning	<i>Potential Barriers to Goal Achievement:</i>
16	Client Progress Review	<i>Case Notes/ISS Review Updates</i>
17	Employment Goals & Achievement Objectives	<i>Employment Plan-Goals-Long Term-Occupational Employment</i> <i>Performance Indicators: Employment Rate-2nd Quarter and Employment Rate-4th Quarter</i>
18	Job Seeker Strengths and Attributes	<i>Employment Plan-Strength</i>
19	Client Responsibilities and Agency Responsibilities	<i>Employment Plan-Notes</i>
20	Additional Notes	<i>Employment Plan-Additional Notes</i>
21	Performance Goals and Accountability Indicators	<i>Employment Plan-Goals-Short Term-Educational/Performance Indicators: Measurable Skills Gain</i> <i>Employment Plan-Notes (some migrated over in the Job Seeker Progress review data)</i>

5.2 ISS Creation/Update

All enrollments after January 1, 2025, must enter data according to the following guidance.

To create or update an ISS, navigate to the Enrollment, and click on the “**Create/Update ISS**” button.



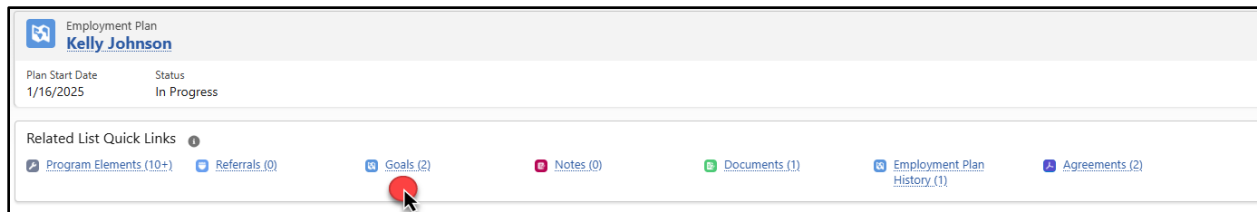
Each section represents one of the 14 youth elements. Actions Steps/Referrals or Comments should be added for each section according to the individual needs of the

youth participant and the services planned and/or provided for the individual youth. For the initial ISS complete the Actions Steps/Referral or Comments section. To update an existing ISS element, click **“Add New Entry”** to insert a new action step/referral or comment. Click **“Save & Next”** to save the entry and move to the next element. Once completed click **“Save & Finish”**.

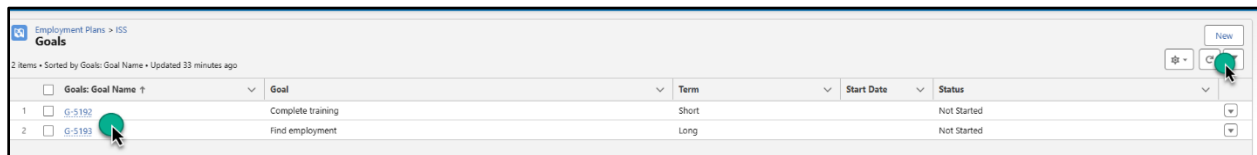
NOTE: The follow-up section of the ISS must be updated after the Jobseeker has exited from the youth program with any follow-up service information. No other section of the ISS can be updated after a jobseeker has exited the program.

Once an ISS has been created a new record will be generated in the employment plan object in the enrollments **“Related List Quick Links”** section.

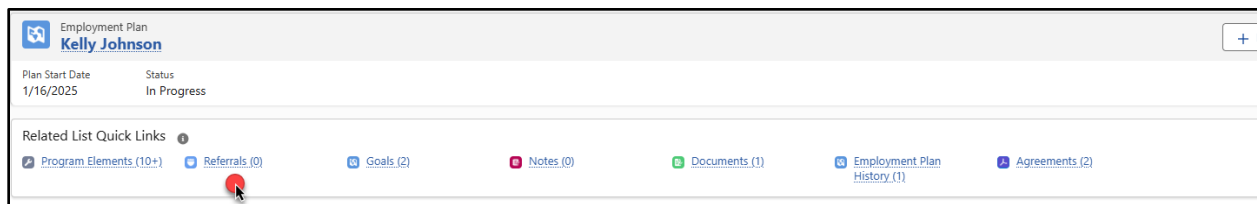
To create and update ISS goals, navigate to the Employment plan object in the Enrollment and click on goals.



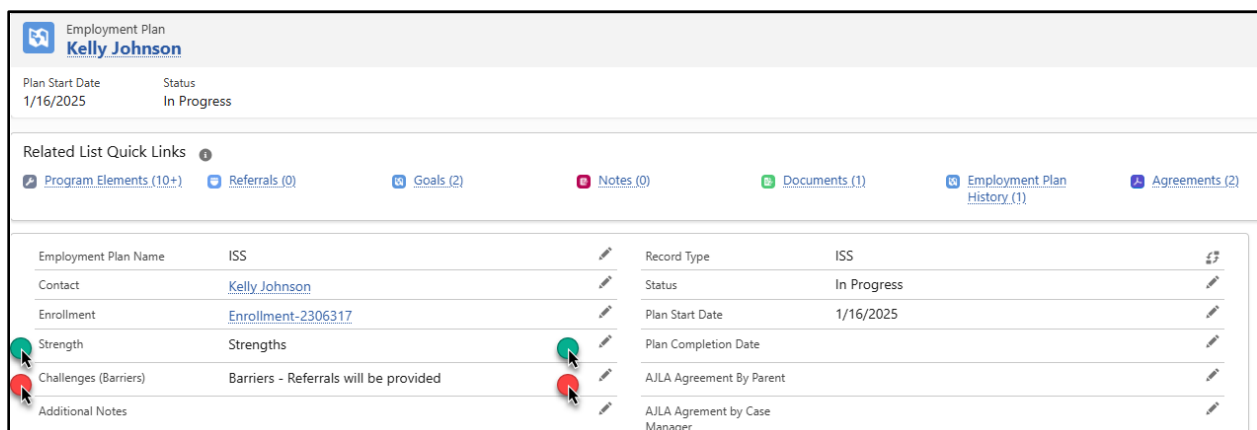
To add a new goal, select **“New”** in the upper right corner of the page enter the necessary details and save the goal. To update an existing goal, select the Goal name. Each ISS must have at least one short-term goal and one long-term goal. Each goal must be tied to at least one performance measure.



To create a Referral, navigate to the Referrals object in the Employment plan. Select **“New”** in the upper right corner of the page and enter the necessary details and a referral record will be created.



To enter the jobseekers Strengths, Challenges (Barriers), and Additional Notes select the pencil icon next to the section in the employment plan object. Enter the necessary details and select **“Save”** to save the information in the ISS.



Strength

Salesforce Sans 12

B I U

Strengths

Challenges (Barriers)

Salesforce Sans 12

B I U

Barriers - Referrals will be provided

Additional Notes

Salesforce Sans 12

B I U

To enter Enrollment Services, navigate to the enrollment services object in the Enrollment and click **“Enrollment Services”**. Select **“New”** in the upper right corner of the page and enter the necessary details to create a program service.

Enrollment Kelly Johnson

Enrollment Date: 1/13/2025 Stage: Enrolled

+ Follow Edit Create/Update IEP Upload Document Create/Update ISS Create Follow Up [DEP] Print

Related List Quick Links

- Enrollment Services (5)
- Follow Ups (0)
- Notes (0)
- Documents (0)
- Enrollment History (5)
- A/LA Enrollment Demographic Snapshots (1)
- Employment Plans (1)
- Service Funding Distributions (1)
- Approval History (3)

Once all details have been added to the ISS sections and the enrollment services have been entered, the ISS document can be generated and sent to the jobseeker for their e-signature. To generate and send the ISS File, navigate to the Employment plan object in the Enrollment and click the **“Send ISS File”** to generate the document. The document will be viewable in the **“agreements”** section, you can see the documents status.

Employment Plan Kelly Johnson

Plan Start Date: 1/16/2025 Status: In Progress

+ Follow Edit Upload Document Send ISS File Clone

Related List Quick Links

- Program Elements (10+)
- Referrals (0)
- Goals (2)
- Notes (0)
- Documents (1)
- Employment Plan History (1)
- Agreements (2)

Employment Plan Name	ISS	Record Type	ISS
Contact	Kelly Johnson	Status	In Progress
Enrollment	Enrollment-2306317	Plan Start Date	1/16/2025

Documents (1)

DOC-637181

Title: Test MSG Document

The ISS document will be sent to the jobseeker’s email on file for signature. Once the jobseeker has signed the document they will return it to the case manager for signature. The case manager will be notified by email and will be prompted to sign. Once all signatures are obtained, the document will be uploaded, and the agreement status will be updated.

5.3 Creating or Updating an IEP

To create or update an IEP, navigate to the Enrollment, and click on the **“Create/Update IEP”** button.

Each section represents one of the 14 components of the IEP. Actions Steps/Referrals or Comments should be added for each section according to the individual needs of the adult participant and the services planned and/or provided for the individual adult.

For the initial IEP complete the Actions Steps/Referral or Comments section. To update an existing IEP element, click **“Add New Entry”** to insert a new action step/referral or comment. Click **“Save & Next”** to save the entry and move to the next element. Once completed click **“Save & Finish”**.

NOTE: The follow-up section of the IEP must be updated after the Jobseeker has exited from the adult program with any follow-up service information. No other section of the IEP can be updated after a jobseeker has exited the program.

Create/Update IEP

Training Goals

Compre... ✓ Training G... Job Seeke... Combinat... Assistive T... Job Seeke... Economic... Supportiv... Follow-up... Performa... Job Seek...

Comments

Salesforce Sans 12 B I U

CNA/CMA training is essential to become a certified medication aide. The training will lead to an in-demand occupation, in turn CN believes that Claire will have a better probability of being successful.

Claire's short-term goal is to complete CNA/CMA training courses.

Claire's long term goal is to obtain employment using her certifications in CNA/CMA.

Updated by

Kristy Austin 5/22/2025 2:57 PM

Comments

Salesforce Sans 12 B I U

Add New Entry
Previous Save & Next

Once an IEP has been created a new record will be generated in the employment plan object in the enrollments **“Related List Quick Links”** section.

Each IEP must have at least one short-term goal and one long-term goal. Each goal must be tied to at least one performance measure.

To create and update IEP goals, navigate to the Employment Plan object in the Enrollment and hover over Goals.

Enrollment

Kelly Johnson

+ Follow Edit Service Entry Training Service Entry Create/Update IEP Submit for Approval Upload Document

Enrollment Date 1/12/2025
Stage Enrolled

Related List Quick Links

Enrollment Services (10+)
Follow Ups (3)
Notes (1)
Documents (5)
Enrollment History (10)
AJLA Enrollment Demographic Snapshots (1)
Employment Plans (1)
Service Funding Distributions (7)
Approval History (8)

Enrollments > Enrollment-2306056

Employment Plans

1 item Updated a few seconds ago

Employment Plan Name	Contact	Career Goals
1 IEP	Kelly Johnson	

Employment Plan

Kelly Johnson

+ Follow Edit Create Goal Send IEP File Create Development Need Upload Document

Plan Start Date 2/24/2025
Status In Progress

Related List Quick Links

Program Elements (10+)
Development Needs (0)
Referrals (0)
Goals (1)
Test Results (0)
Notes (0)
Documents (0)
Employment Plan History (1)
Agreements (1)

To add a new goal, select **“New”** in the upper right corner of the page, enter the necessary details and save the goal.

The screenshot shows the 'Employment Plan' for 'Kelly Johnson'. The plan start date is 2/24/2025 and the status is 'In Progress'. Under 'Related List Quick Links', 'Goals (1)' is highlighted. In the 'Goals' section, there is a table with one item: 'G-5430' with the goal 'Training Milestone - Test', term 'Short', and status 'Not Started'. A 'New' button is highlighted in the top right corner of the Goals section.

To update an existing goal, select the Goal name and make the necessary updates.

The screenshot shows the 'Employment Plan' for 'Kelly Johnson'. The plan start date is 2/24/2025 and the status is 'In Progress'. Under 'Related List Quick Links', 'Goals (1)' is highlighted. The 'Goals' section shows a table with one item: 'G-5430' with the goal 'Training Milestone - Test', term 'Short', and status 'Not Started'.

The screenshot shows the 'Employment Plan' for 'Kelly Johnson'. The plan start date is 2/24/2025 and the status is 'In Progress'. Under 'Related List Quick Links', 'Goals (1)' is highlighted. The 'Goals' section shows a table with one item: 'G-5430' with the goal 'Training Milestone - Test', term 'Short', and status 'Not Started'. The goal name 'G-5430' is highlighted.

To create a Referral, navigate to the Referrals object in the Employment plan. Select **“New”** in the upper right corner of the page and enter the necessary details and a referral record will be created.

The screenshot shows the 'Employment Plan' for 'Kelly Johnson'. The plan start date is 2/24/2025 and the status is 'In Progress'. Under 'Related List Quick Links', 'Referrals (0)' is highlighted. In the 'Referrals' section, there is a 'New' button highlighted in the top right corner.

To enter the jobseekers Career Goals and Additional Notes select the pencil icon next to the section in the employment plan object. Enter the necessary details and select **“Save”** to save the information in the IEP.

Employment Plan
Kelly Johnson

Plan Start Date: 2/24/2025 Status: In Progress

Related List Quick Links

- Program Elements (10+)
- Development Needs (0)
- Goals (1)
- Test Results (0)
- Notes (0)
- Documents (0)
- Employment Plan History (1)

Employment Plan Name	IEP	Record Type	IEP
Enrollment	Enrollment-2306056	Status	In Progress
Contact	Kelly Johnson	Plan Start Date	2/24/2025
Career Goals		Plan Completion Date	
Additional Notes			
A/LA Agreement Created Date			

System Information

Once all details have been added to the IEP sections, the IEP document can be generated and sent to the jobseeker for their e-signature.

To generate and send the IEP File, navigate to the Employment plan object in the Enrollment and click the **“Send IEP File”** to generate the document. The document will be viewable in the **“Agreements”** section, you can see the documents status.

Employment Plan
Kelly Johnson

Plan Start Date: 2/24/2025 Status: In Progress

Related List Quick Links

- Program Elements (10+)
- Development Needs (0)
- Goals (1)
- Test Results (0)
- Notes (0)
- Documents (0)
- Employment Plan History (1)
- Agreements (1)

Employment Plan Name	IEP	Record Type	IEP
Enrollment	Enrollment-2306056	Status	In Progress
Contact	Kelly Johnson	Plan Start Date	2/24/2025
Career Goals		Plan Completion Date	
Additional Notes			
A/LA Agreement Created Date			

System Information

Documents (0)

Agreements (1)

IEP
Date Sent (Date): 6/23/2025
Date Signed (Date):
Agreement Status: Out for Signature

View All

Employment Plan
Kelly Johnson

Plan Start Date: 2/24/2025 Status: In Progress

Related List Quick Links

- Program Elements (10+)
- Development Needs (0)
- Goals (1)
- Test Results (0)
- Notes (0)
- Documents (0)
- Employment Plan History (1)
- Agreements (1)

Employment Plan Name	IEP	Record Type	IEP
Enrollment	Enrollment-2306056	Status	In Progress
Contact	Kelly Johnson	Plan Start Date	2/24/2025
Career Goals		Plan Completion Date	
Additional Notes			
A/LA Agreement Created Date			

System Information

Documents (0)

Agreements (1)

IEP
Date Sent (Date): 6/23/2025
Date Signed (Date):
Agreement Status: Out for Signature

View All

The IEP document will be sent to the jobseeker’s email on file for signature. Once the jobseeker has signed the document they will return it to the case manager for signature.

The case manager will be notified by email and will be prompted to sign. Once all signatures are obtained, the document will be uploaded, and the agreement status will be updated.

Chapter 6 — Referrals

This chapter outlines the process for referral entry in EmployOklahoma.

6.1 Entering a Referral

*Please note: All referrals for enrollments must first have an enrollment service entered.

1. On the Contact Page, hover over **“Referrals”**
2. Then select **“New”**

The screenshot displays the 'Contact' page for '00623052'. At the top, there are fields for Name (Kelly Johnson), Phone (2), Email, Contact Owner, Veteran Flag, and MSFW Flag. Below these are 'Related List Quick Links' for various services like Participation Periods, Job Development, Snapshots, etc. The 'Referrals' section is highlighted with a green box, showing '0 items' and a 'Sorted by Date of Referral' option. A 'New' button is also highlighted with a green box and a red arrow, indicating the next step in the process. The bottom of the page features a 'View All' link and a decorative graphic of a cactus and sun.

3. Complete the following fields:

- Contact (required)
- Status (required)
 - Status of referral at the time of entry
- Participation Period # (required)
- Date of Referral (required)
- Enrollment # (required)
- Referral Type (required)
 - **Prior** to a Jobs for Veterans State Grants (JVSG) referral, ensure the veteran is Eligible for DVOP Services on the contact page.
- Referral Reason (required)
 - All Jobs for Veterans State Grants (JVSG) referrals **must** have at least one of the following reasons selected:
 - Significant Barrier to Employment
 - TSM Need of Individual Career Services
 - Vietnam Vet
 - Vet Wounded/ III/ Injured Located in a Military Facility
 - Caregiver of Vet Wounded/ III/ Injured in a Military Facility
 - Vocational Rehabilitation & Employment Determinations

- Post-9/11 GI Bill Benefits
- Montgomery GI Bill Benefits
- Substance Abuse Assistance
- PTSD and TBI Treatment; or
- Other
- Comments (required)
 - Reasoning for referral notated
- Referral Outcome (required)

New Referral

* = Required Information

Information

Referral # * Contact Kelly Johnson Participation Period # Search Participation Periods... Enrollment # Search Enrollments... Employment Plan Search Employment Plans...	Owner * Status Not Started * Date of Referral 5/30/2025 * Referral Type --None-- * Referral Reason <table border="0" style="width: 100%;"> <tr> <td style="width: 50%;"> Available Significant Barrier ... TSM Need of Indiv... Vietnam Vet Vet Wounded/III/I... Caregiver of Vet W... </td> <td style="width: 10%; text-align: center; vertical-align: middle;"> ▶ ◀ </td> <td style="width: 40%;"> Chosen </td> </tr> </table> Parent Referral Search Referrals...	Available Significant Barrier ... TSM Need of Indiv... Vietnam Vet Vet Wounded/III/I... Caregiver of Vet W...	▶ ◀	Chosen
Available Significant Barrier ... TSM Need of Indiv... Vietnam Vet Vet Wounded/III/I... Caregiver of Vet W...	▶ ◀	Chosen		

Referral Type Details

Comments

Referral Partner/Outcome Details

Referral Partner

Referral Partner Contact

* Referral Outcome

Referral Outcome Date

Services Delivered Comments

Legacy fields

Cancel Save & New Save

4. Then select **“Save”**.
5. The referral will now be visible on the Contact page, under the **“Referrals”** quick link.

Contact 00623052

Related List Quick Links

Referrals (1)

Referral #	Referral Partner	Referral Type	Status	Referral Outcome	Date of Referral
1	REF-14903	Drivers License	In Progress	Pending	5/15/2025

6.2 Updating a Referral

*Please note: All enrollment services entered for enrollment **must** be updated with the referral.

1. On the Contact page, hover over **“Referrals”**
2. Select the referral number you need to update

Contact
00623052

Name Kelly Johnson Phone (2) Email Contact Owner Veteran Flag MSFW Flag

Related List Quick Links

Participation Periods (1) Job Development (0) Snapshots (10+) Credential/Masurable Skill Gained (9) UI Claims (0) Wages & Earnings (2) Work Experience (1) Eligibilities (5)

Enrollments (4) Enrollment Services (10+) Client Skills (4) Certifications (1) Objective Assessments (0) Employment Plans (3) Development Needs (0) Goals (1)

Referrals (1) Event Attendee Enrollments (0) Event Attendance Trackings (0) Saved Job (0) Job Applications (0) Search Histories (10+) Hires (0) Employment History (2)

Referrals 1 item • Sorted by Date of Referral • Updated a few seconds ago

Referral #	Referral Partner	Referral Type	Status	Referral Outcome	Date of Referral ↓
1 REF-14903		Drivers License	In Progress	Pending	5/15/2025

View All

3. Select the pencil icon or **“Edit”** to update the referral record
4. Changing the **“Referral Outcome”** and **“Status”** (required)
 - These fields **must** match based on the referral outcome and should be updated throughout the referral process.
5. Updating **“Comments”** (required)
 - Throughout the referral process, comments **must** be added when updating the referral outcome and status.
6. Enter **“Referral Outcome Date”** (required when referral is completed)
7. Then select **“Save”**.

Referral
Kelly Johnson

Date of Referral 5/15/2025 Referral Partner Referral Outcome Completed

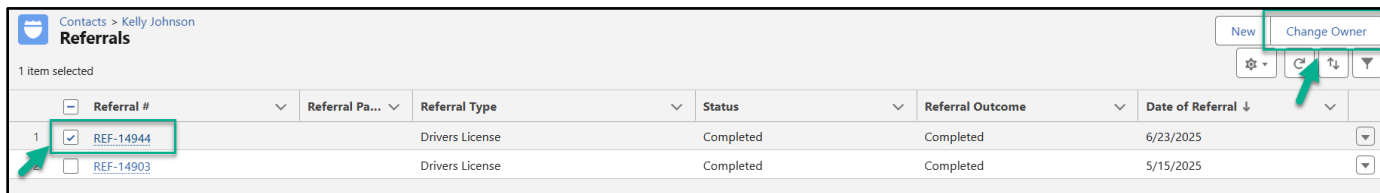
Related List Quick Links

Notes (0) Documents (0) Referral History (4)

Referral # REF-14903	Owner
Contact Kelly Johnson	Status Completed
Participation Period # P-870181	Date of Referral 5/15/2025
Enrollment # Enrollment-2324905	Referral Type Drivers License
Program WIOA Dislocated Workers	Referral Reason Significant Barrier to Employment
	Parent Referral
Employment Plan	
Additional Information	
Repeat Referral	
Reason for Repeat Referral	
Referral Type Details	
Comments 05/15 - Referred Kelly for Driver's License 05/30 - Kelly obtained her Driver's License	
Referral Partner/Outcome Details	
Referral Partner	Referral Partner Contact
Referral Outcome Completed	Referral Outcome Date 5/30/2025
	Services Delivered Comments

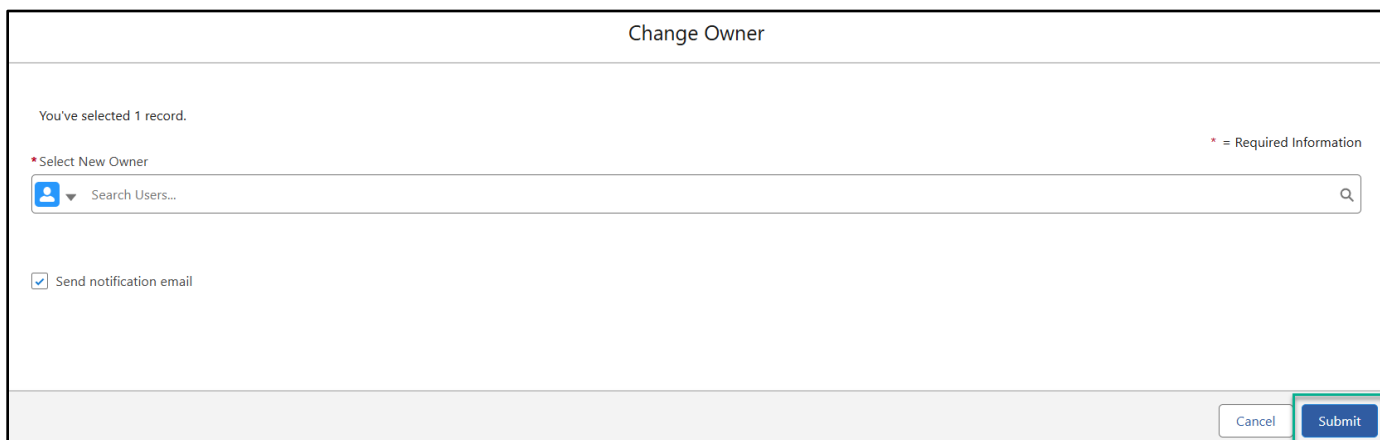
6.3 Changing Owner

1. Within the referrals object, check the box next to the referral needing to be updated then select **“Change Owner”**.



Referral #	Referral Pa...	Referral Type	Status	Referral Outcome	Date of Referral
☒ REF-14944		Drivers License	Completed	Completed	6/23/2025
☐ REF-14903		Drivers License	Completed	Completed	5/15/2025

2. Next, search and select the correct new owner and click **“Submit”**.



Change Owner

You've selected 1 record.

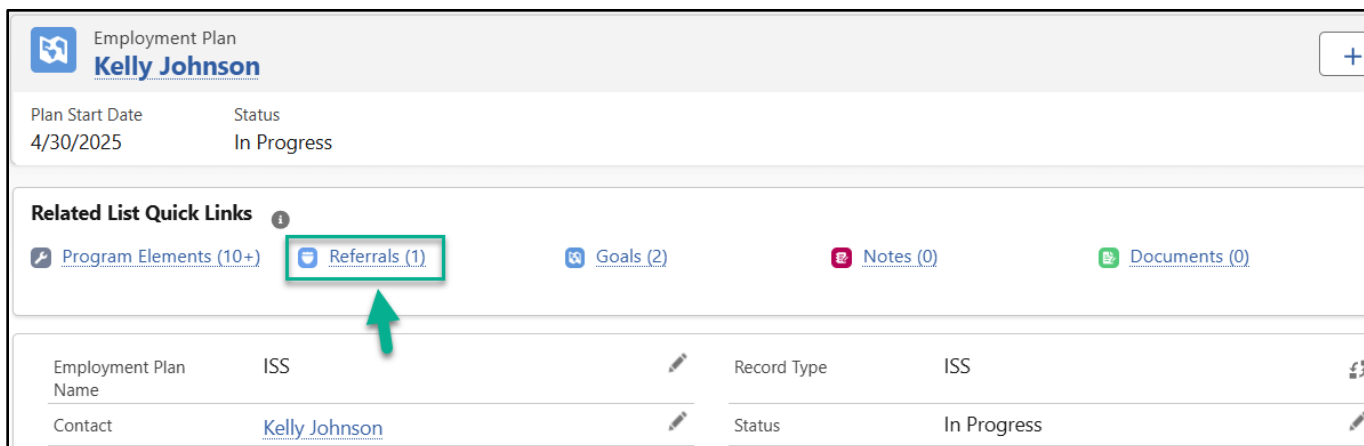
* Select New Owner

☒ Send notification email

Cancel Submit

6.4 Referrals within IEP/ISS

1. From the Employment Plan page, referrals can also be entered and will populate on the Contact page.



Employment Plan
Kelly Johnson

Plan Start Date: 4/30/2025
Status: In Progress

Related List Quick Links

- Program Elements (10+)
- Referrals (1)**
- Goals (2)
- Notes (0)
- Documents (0)

Employment Plan Name	ISS	Record Type	ISS
Contact	Kelly Johnson	Status	In Progress

Employment Plan
Kelly Johnson

[+ Follow](#)
[Edit](#)
[Create](#)

Plan Start Date
2/24/2025
Status
In Progress

Related List Quick Links

- [Program Elements \(10+\)](#)
- [Development Needs \(0\)](#)
- [Referrals \(0\)](#)
- [Goals \(1\)](#)
- [Test Results \(0\)](#)
- [Employment Plan History \(1\)](#)
- [Agreements \(1\)](#)

Employment Plan Name	IEP	Record Type	IEP
Enrollment	Enrollment-2306056	Status	In Progress

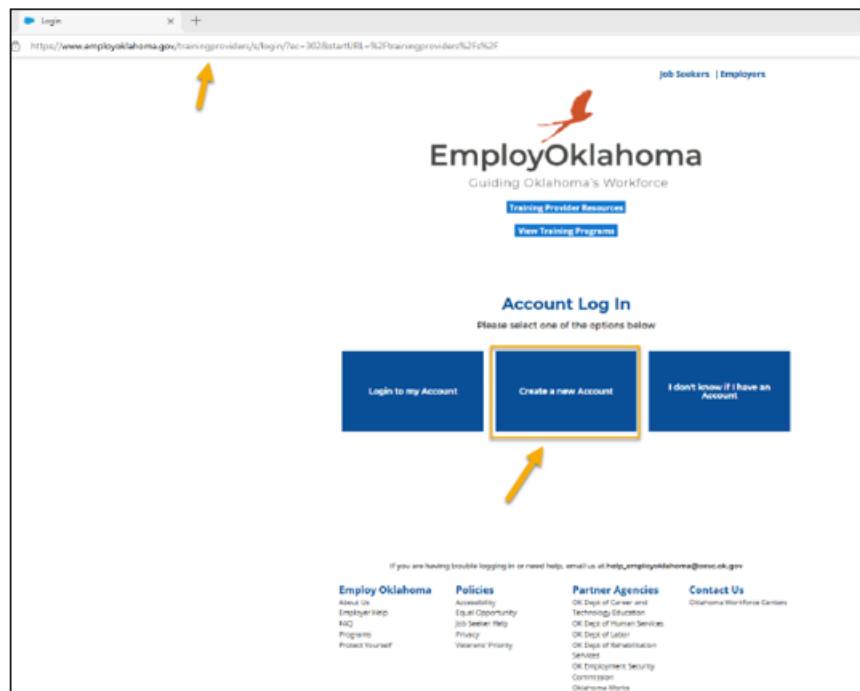
SECTION III — TRAINING PROVIDERS

Chapter 7 — Training Providers Account Creation and Navigation

This chapter provides guidance for training providers on account creation and navigation in EmployOklahoma.

7.1 Training Provider Self-Registration-Account Creation

1. Navigate to the Training Provider Portal, verify in the URL “**training providers**” is listed. Select “**Create a New Account**” to register.



From this screen, select “**Sign up now**”.


Sign in
 Sign in with your email address

Email Address

Password

[Forgot your password?](#)

Sign in

Don't have an account? [Sign up now](#)

- On the **“User Details”** page, input a new email address to register within the portal and send the verification code. Once the verification code is received, add the code into the text field and select **“Verify code”**.

< Cancel

User Details

Verification code has been sent to your inbox. Please copy it to the input box below.

rileytetrassatt+33@gmail.com *

Send verification code

Verification Code *

Verify code **Send new code**

- After verifying the code, enter in **all** information on the **“User Details”** page and select **“Create”**.

User Details

E-mail address verified. You can now continue.

rileystestrassatt+33@gmail.com *

Change e-mail

New Password is required.

New Password *

The password entry fields do not match. Please enter the same password in both fields and try again.

Confirm New Password *

Display Name

Given Name

MiddleName

Surname

Create

4. The next screen asks for the Training Provider's FEIN.

The screenshot shows the EmployOklahoma portal interface. At the top, the logo "EmployOklahoma" is displayed with the tagline "Guiding Oklahoma's Workforce" and a red bird icon. Below the logo, the user's email address "rileytestrassatt+33@gmail.com.oesc.etp" and a "Log Out" link are visible. The main content area is titled "Basic Information" with a dropdown arrow. Under this section, there is a label "* FEIN" with an information icon, followed by a text input field. At the bottom right of the form, there is a blue "Next" button.

5. If the FEIN entered already exists in the portal, an alert message will be displayed, as shown below. If the user wants to proceed with the existing FEIN, select **“Continue With Warnings”**. If the user wants to update the FEIN, select **“No”** to modify the FEIN.

The screenshot shows the EmployOklahoma portal interface with an alert message. The header and user information are the same as in the previous screenshot. The main content area contains a text box with the following message: "Our records indicate that a training provider account with the provided FEIN exists in our system. If the provided FEIN is correct and you wish to create a new account using this information, click 'Continue With Warnings'. To update the FEIN click, 'No'." Below the text box, there are two buttons: a white "No" button and a blue "Continue With Warnings" button.

6. The next screen requires all necessary details relating to the Training Provider Account, such as Account Name, Address Details, etc. After entering all the required information, select **“Eligible Training Provider Assurances”** to move forward.

EmployOklahoma
Guiding Oklahoma's Workforce

rileytestrassatt+33@gmail.com.oesc.etp [Log Out](#)

▼ Account Information

* Account Name

Phone

* Email
you@example.com

Website

RAPIDS Number ⓘ

* County
--None--

* Region ⓘ
--None--

▼ Address Information

* Billing Address Search

* Street

* City
Noble

* State

* Zip Code

* Country
United States

[Previous](#) [Eligible Training Provider Assurance](#)

- After reading through all the assurances on the **“Eligible Training Provider – Assurances”** page, be sure to check the box, type your signature, and select **“Next”**.

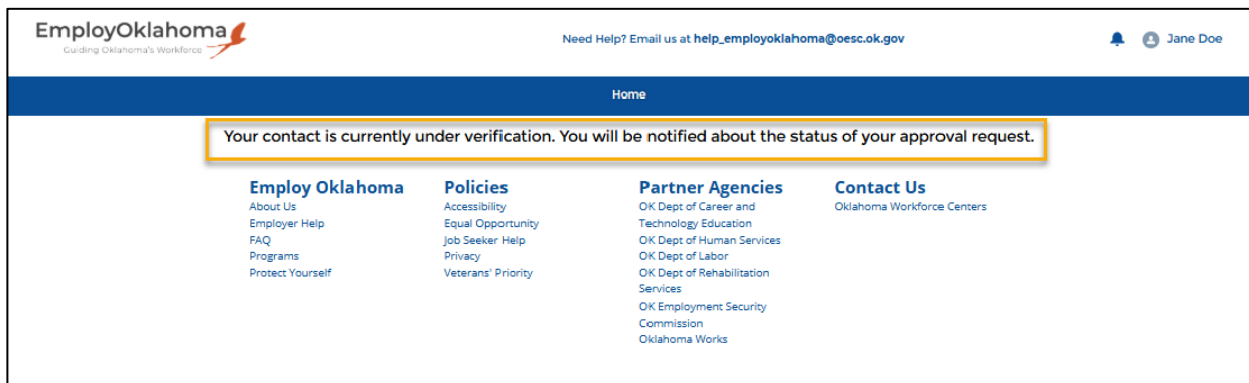
☒ I accept the Eligible Training Provider Assurance.

* Signature
Jane Doe

[Previous](#) [Next](#)

- Upon successful completion of registration, ETP staff will be notified to review the contact. Until the training provider contact has been reviewed, the following message

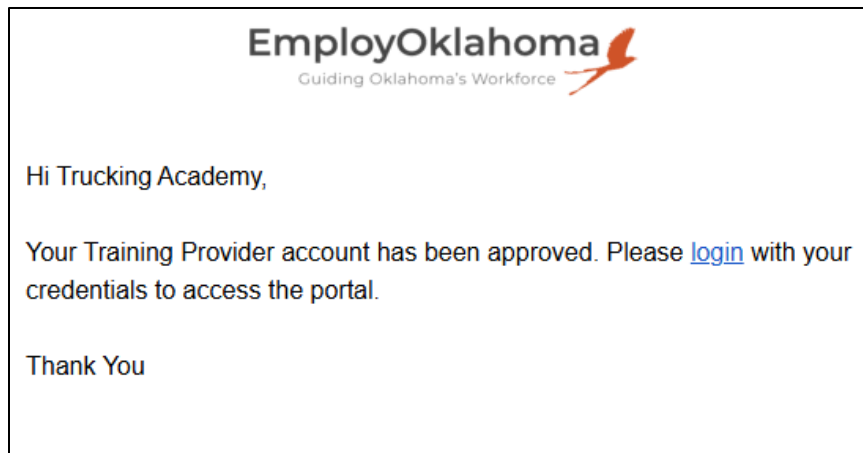
will be present, “Your contact is currently under verification. You will be notified about the status of your approval request”.



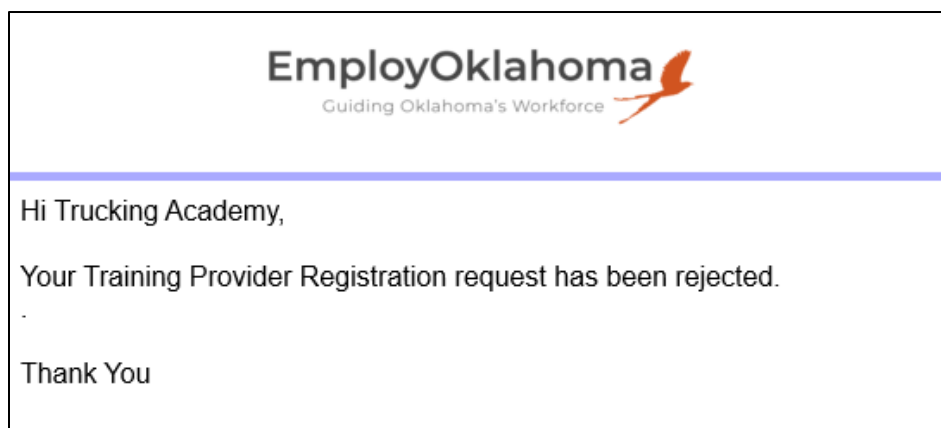
9. The training provider contact will receive the following email notification after successful registration and submission for approval.



10. If the training provider contact has been approved, the contact will receive the following email notification.

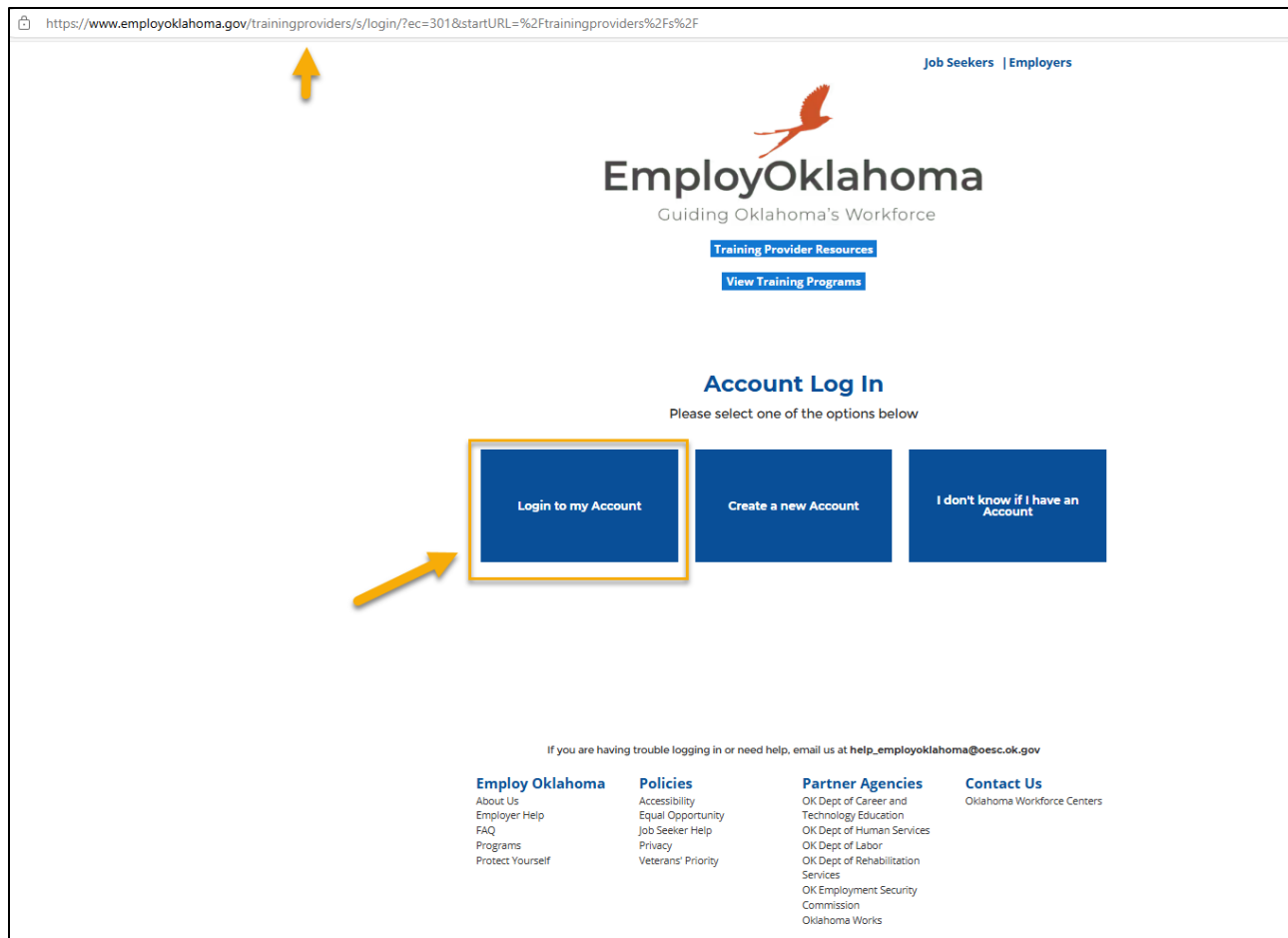


11. If the training provider contact has been rejected, the contact will receive the following email notification.

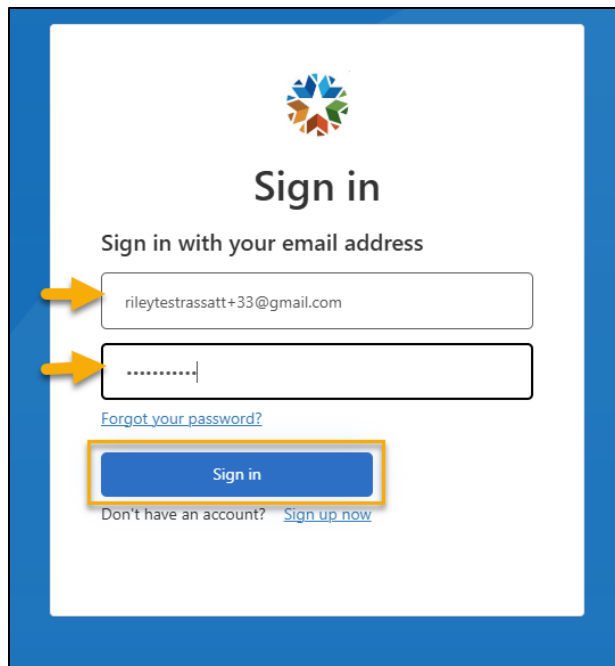


7.2 Login to an Existing Account

1. After verifying the URL contains **"training providers"**, Training provider contacts with active credentials can login to the portal by selecting **"Login to my Account"**.



2. On the “Sign in” page, enter the active email address and password, then select “Sign in”.



The image shows a 'Sign in' form with a blue border. At the top is a circular logo with colorful arrows. Below it is the text 'Sign in' and 'Sign in with your email address'. There are two input fields: the first contains the email 'rileystestrassatt+33@gmail.com' and the second contains masked characters '.....'. A yellow arrow points to each input field. Below the password field is a blue link 'Forgot your password?'. At the bottom is a blue 'Sign in' button, which is highlighted with a yellow rectangle. Below the button is the text 'Don't have an account?' followed by a blue link 'Sign up now'.

Sign in

Sign in with your email address

rileystestrassatt+33@gmail.com

.....

[Forgot your password?](#)

Sign in

Don't have an account? [Sign up now](#)

7.3 View and Search Approved Training Programs

1. External users can view all eligible training providers and training programs from the landing page of the portal by selecting **“View Training Programs”**.

[Job Seekers](#) | [Employers](#)



Guiding Oklahoma's Workforce

[Training Provider Resources](#)
[View Training Programs](#)

Account Log In

Please select one of the options below

Login to my Account

Create a new Account

I don't know if I have an Account

If you are having trouble logging in or need help, email us at help_employoklahoma@oescc.ok.gov

Employ Oklahoma
 About Us
 Employer Help
 FAQ
 Programs
 Protect Yourself

Policies
 Accessibility
 Equal Opportunity
 Job Seeker Help
 Privacy
 Veterans' Priority

Partner Agencies
 OK Dept of Career and Technology Education
 OK Dept of Human Services
 OK Dept of Labor
 OK Dept of Rehabilitation Services
 OK Employment Security Commission
 Oklahoma Works

Contact Us
 Oklahoma Workforce Centers

2. The search for approved training programs can be narrowed down by using the filters.



Guiding Oklahoma's Workforce

[Home](#)
[ETPL Search](#)
[Eligible Training Provider List](#)

Search Eligible Training Providers

You can search for Eligible Training Providers by...

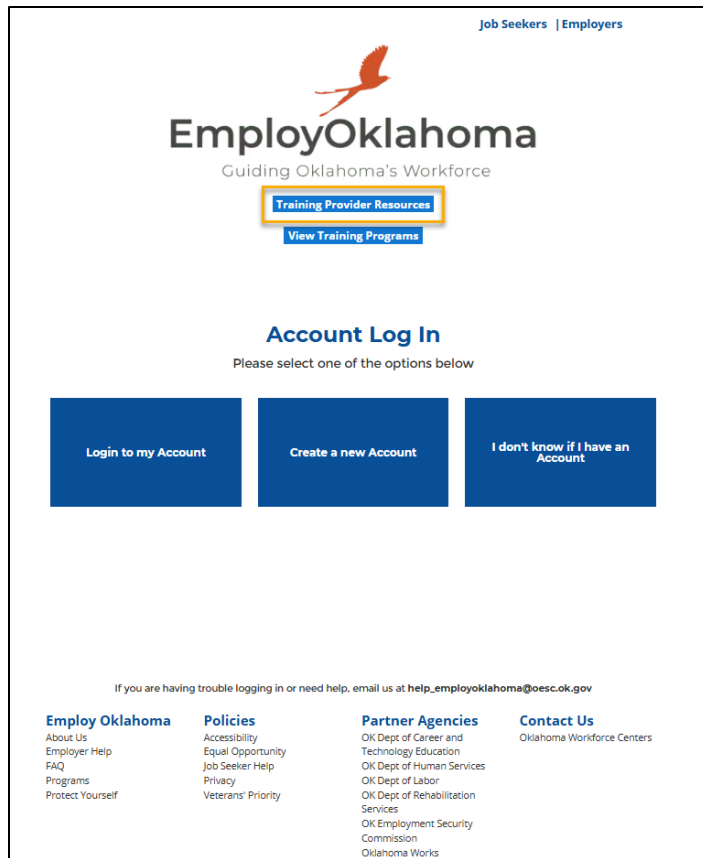
Search Programs

Focus on narrowing down the right Training Programs for you, then click Search Programs to see results.

Training Program Name 	Costs: Books & Supplies 	Costs: Tuition & Fees 	Program Length Hours 	Program Length Weeks
Name of Associated Credential 	In-State Total Cost 	Out-Of-State Total Cost 	Program Prerequisites	Program Format

7.4 Training Provider Resources

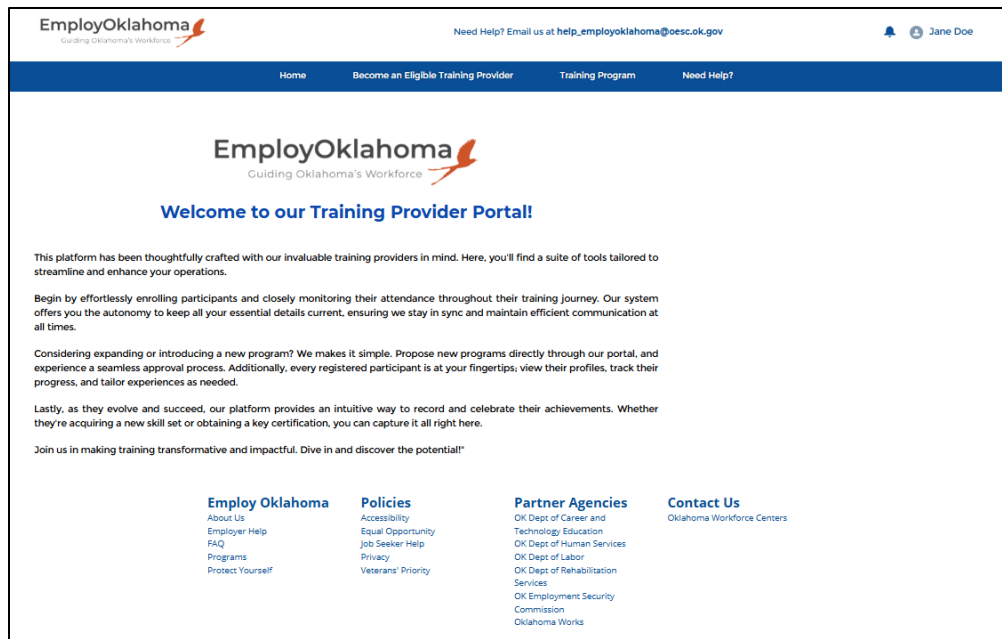
1. From the landing page, helpful links can be found when clicking **“Training Provider Resources”**.



7.5 Training Provider Portal User Capabilities

Features on Home Page

1. Upon successful login, training provider contacts will see the message **“Welcome to our Training Provider Portal”**.

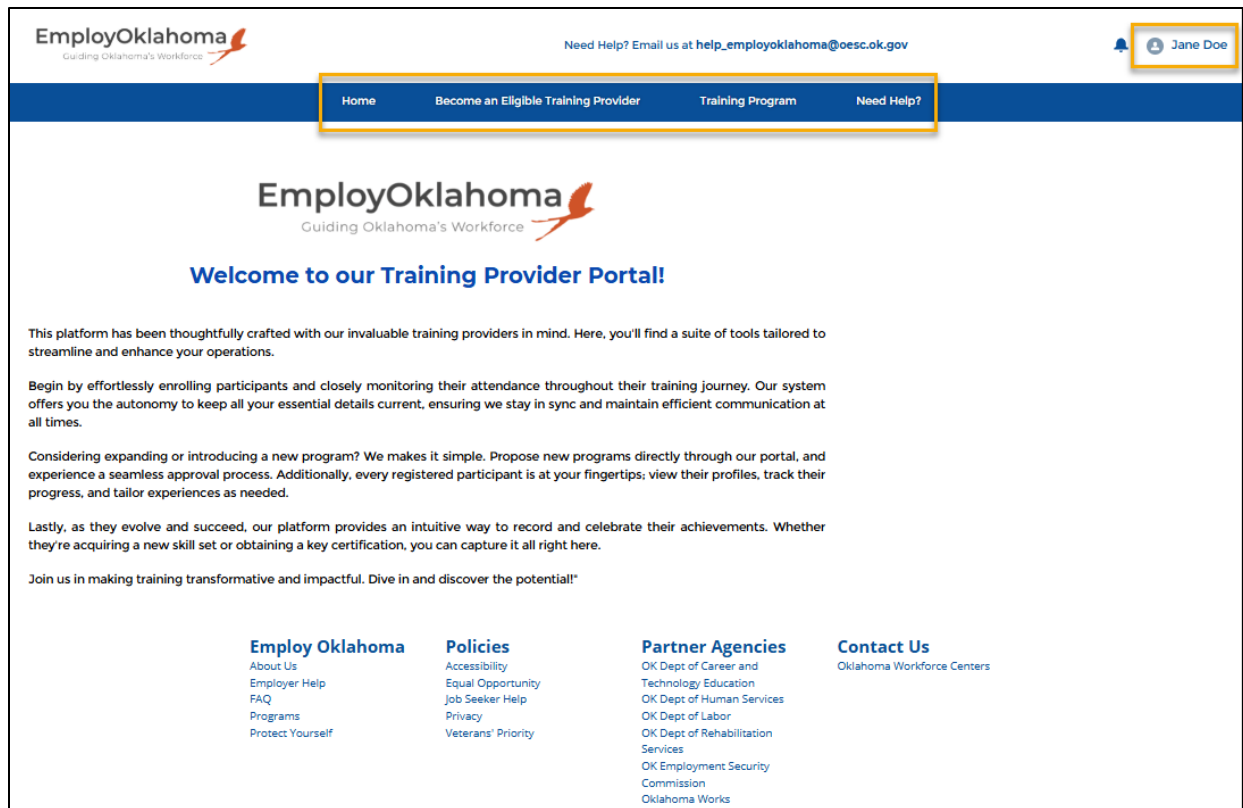


2. Contacts can access the following screens by selecting the different tabs across the top of the Home Page.

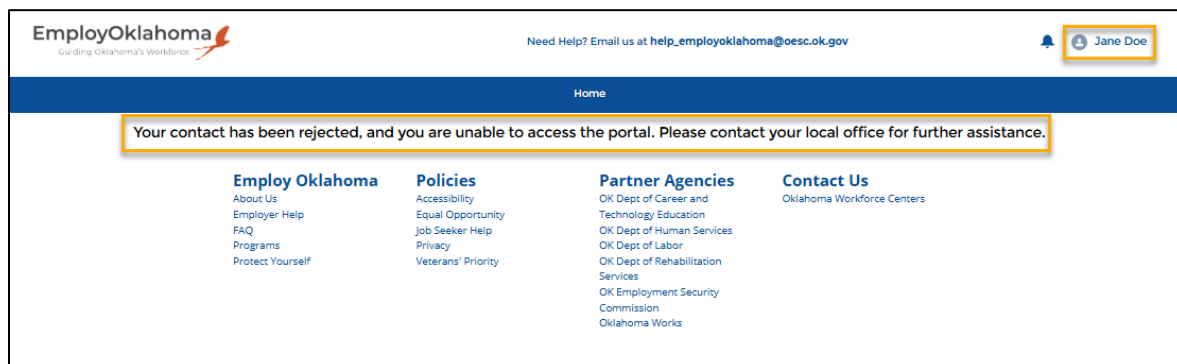
- a. Become an Eligible Training Provider
- b. Training Program
- c. Need Help?

Under the contact's name after clicking it:

- a. My Profile
- b. My Account
- c. Logout



3. Contacts can log out of the portal by clicking their avatar/name on the top right corner of the home page then select **"Logout"**.
4. If the contact is rejected, the below message will appear, and the user will only be able to update their profile and account information by selecting their avatar/name.



7.6 Applying to become an Eligible Training Provider

1. Approved contacts will be able to submit the application to become an Eligible Training Provider from the tab **"Become an Eligible Training Provider"**.

EmployOklahoma
Guiding Oklahoma's Workforce

Need Help? Email us at help_employoklahoma@oesc.ok.gov Jane Doe

Home **Become an Eligible Training Provider** Training Program Need Help?

Become an Eligible Training Provider

Provider Name : Trucking Academy

Address

Street :

City :

State/Province : OK

Country : United States

Zip/Postal Code :

Region : Central

Please make sure you have uploaded the necessary files by clicking on the checkbox next to the file name below.

Supplementary Documents

☐ Alternative document instead of WIDA performance Indicator

☐ Other Documents

☐ Credentials

☐ Debarment

☐ Accreditation and Financial Aid

UploadDocument

Or drop files

Employ Oklahoma
About Us
Employer Help
FAQ
Programs
Protect Yourself

Policies
Accessibility
Equal Opportunity
Job Seeker Help
Privacy
Veterans' Priority

Partner Agencies
OK Dept of Career and Technology Education
OK Dept of Human Services
OK Dept of Labor
OK Dept of Rehabilitation Services
OK Employment Security Commission
Oklahoma Works

Contact Us
Oklahoma Workforce Centers

2. Contacts will upload the necessary documents and select **"Submit"** for ETP staff to review their application to become an Eligible Training Provider.
3. Once the application has been submitted successfully, the message below will appear.

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Guiding Oklahoma's Workforce

Need Help? Email us at help_employoklahoma@oesc.ok.gov Jane Doe

Home **Become an Eligible Training Provider** Training Program Need Help?

Your application to become an eligible training provider has been successfully submitted.

Employ Oklahoma
About Us
Employer Help
FAQ
Programs
Protect Yourself

Policies
Accessibility
Equal Opportunity
Job Seeker Help
Privacy
Veterans' Priority

Partner Agencies
OK Dept of Career and Technology Education
OK Dept of Human Services
OK Dept of Labor
OK Dept of Rehabilitation Services
OK Employment Security Commission
Oklahoma Works

Contact Us
Oklahoma Workforce Centers

4. After the request has been submitted and it's being reviewed, contacts will see the message **"Your request to Become an Eligible Training Provider is under review"** when clicking on the **"Become an Eligible Training Provider"** tab.



5. If the application is approved, the following message will appear if the contact clicks **“Become an Eligible Training Provider”**.



7.7 Creating Training Programs

1. Eligible Training Providers can submit training programs for review by selecting the **“Training Program”** tab.
2. Next, the contact will select the **“New Training Program”** type- either **“Training Programs”** or **“RA Training Programs”**.

The screenshot shows the EmployOklahoma website. The top navigation bar includes links for Home, Become an Eligible Training Provider, Training Program (highlighted with a yellow box and an arrow), and Need Help?. Below the navigation bar, the 'Training Program' section is displayed, featuring a search bar and a dropdown menu labeled 'New Training Program' with the option '-Select Type of Training Program-' (highlighted with a yellow box and an arrow). The footer contains links for Employ Oklahoma, Policies, Partner Agencies, and Contact Us.

- After selecting “Training Programs”, fill out all the required information for the program and then select “Save”.

The screenshot shows the 'New Training Program: Training Programs' form. The form is divided into several sections: Program Information, Record Type, Local Area, Single or multiple courses?, Description of Training Program, Program Format, Training Schedule, Program Prerequisites, Training Location, and ZIP. The 'Save' button is highlighted with a yellow box. The form includes various input fields, dropdown menus, and checkboxes for required information.

- After successfully adding a training program, performance measures must be submitted to trigger the review process.

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Guiding Oklahoma's Workforce

Need Help? Email us at help_employoklahoma@oesc.ok.gov

Home Become an Eligible Training Provider Training Program Need Help?

Training Program
CDL

Training Provider: [Trucking Academy](#) Occupational Code #1: [Heavy and Tractor-Trailer Truck Drivers](#) Program Status: Pending Initial Approval Course Type: New In-State Total Cost: \$4,200.00

Please click on the "New" button in the "Performance Measures" section on the right to submit the Overall Performance measure and trigger the approval process for the selected program.

▼ Program Information

Training Program Name CDL	Record Type Training Programs
Training Provider Trucking Academy	Local Area Central
WIOA Approval	Single or multiple courses? Single courses
Non-Traditional Gender Work? Non-traditional for women	Description of Training Program CDL Training
URL of Training Program	Program Format In Person
Training Schedule Daytime Hours	Program Prerequisites High School Diploma or Equivalent
Training Location United States	ZIP

Training Program - Performance Measures (0) **New**

Files (0) **Add Files**

[Upload Files](#)

Or drop files

5. Once all required fields for performance have been completed, click "Save".

Occupational Code #1: Program Status: Course Type: In-State Total Cost:

New Training Program - Performance Measures: Overall

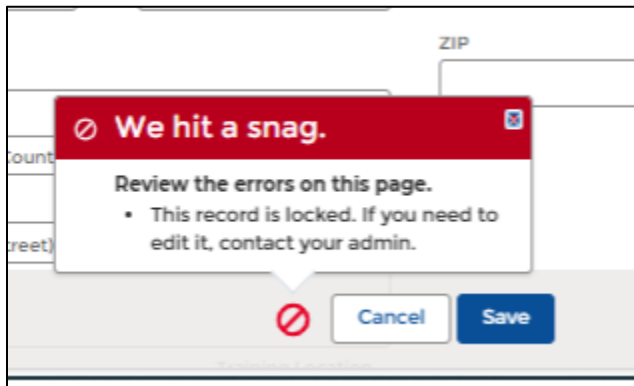
* = Required Information

Information

* Performance Report Name 	Record Type Overall
* Number Served ¹ 	* Training Program CDL
* Number Completed ¹ 	* Number Exited ¹
* Nr Employed in 2nd Qtr After Exit ¹ 	* Dr for Employed in 2nd Qtr After Exit ¹
* Nr Employed in 4th Qtr After Exit ¹ 	* Dr for Employed in 4th Qtr After Exit ¹
* Credential Attainment ¹ 	* Median Earnings in 2nd Qtr After Exit ¹
* Avg Earnings in 2nd Qtr After Exit ¹ 	* Average Earnings in 4th Qtr After Exit ¹
* Start Date 	* End Date

Cancel Save & New **Save**

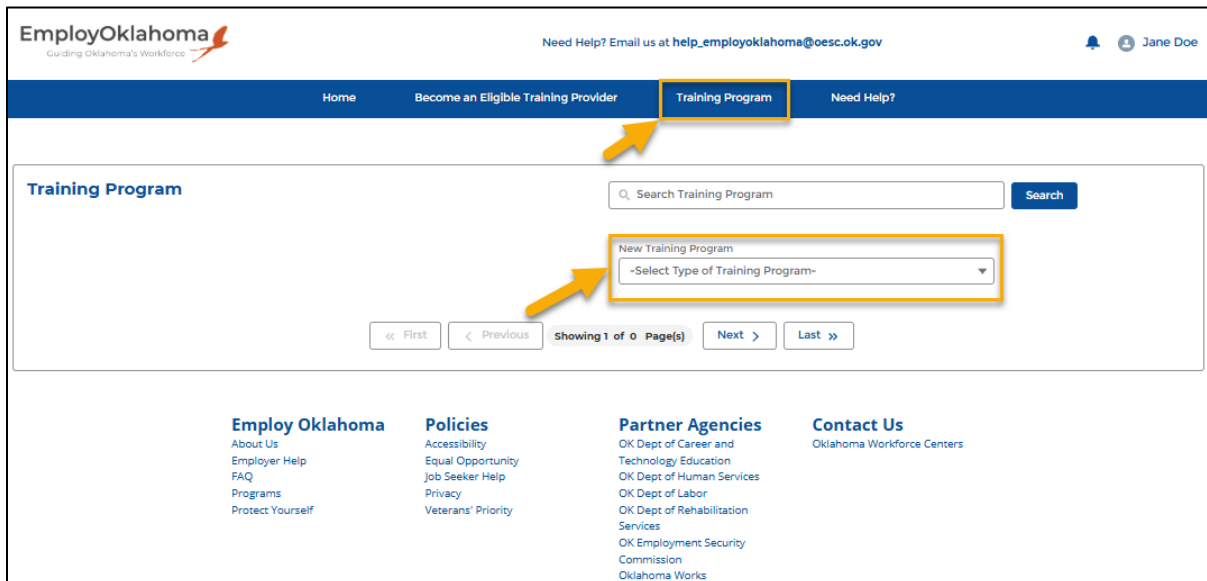
- After the performance information has been submitted, the contact will receive an error message if they try to update information on the program because the program is going through the review process.



- The contact will receive email notification of the program's status once the program has gone through the review process.

7.8 Creating RA Training Programs

- Training Providers can create RA training programs without becoming an Eligible Training Provider first.
- Training Providers will select **"Training Program"** at the top of the page then select **"RA Training Programs"** for the new training program type.



- Then fill out all the required information for the new RA training program and select **"Save"**.

Need Help? Email us at help_employoklahoma@oescc.ok.gov

New Training Program: RA Training Programs

* = Required Information

Sponsor Program Information

* Training Program Name

 Complete this field.

Date of Registration

Record Type
 RA Training Programs

* Description of Training Program

Occupational Code #1

Program Format
 Available: In Person, Online, E-learning..., Hybrid or Blended ...
 Chosen:

No of active apprentices in the programs

Offered When
 Available: Class held days, Class held evenings, Class held weeken..., Class held other - ...
 Chosen:

Length of Apprenticeship

Date

Program Status

Providing Related Technical Instruction
☐

I agree to add the RA program to ETPL
☒

* Training Provider

System Information

Legacy Data Source

Legacy Source ID

Buttons: Cancel, Save & New, **Save**

4. Approved documentation from the Office of Apprenticeship must be submitted by selecting “Upload Files”.

EmployOklahoma
 Guiding Oklahoma's Workforce

Need Help? Email us at help_employoklahoma@oescc.ok.gov

Jane Doe

Home Become an Eligible Training Provider Training Program Need Help?

Training Program
 Welding RA Program

Training Provider: [Trucking Academy](#) Occupational Code #1: Program Status: Pending Final Approval Course Type: New In-State Total Cost:

Please upload the 'Approved Document from the Office of Apprenticeship' by clicking the 'Add Files' button located on the right side of the page.

▼ Sponsor Program Information

Training Program Name	Record Type
Welding RA Program	RA Training Programs
Date of Registration	Description of Training Program
2/14/2025	Welding RA program
Program Format	Occupational Code #1
In Person	
No of active apprentices in the programs	Offered When
Length of Apprenticeship	Providing Related Technical Instruction
2 years	

Files (0) Add Files

Upload Files

Or drop files

Training Program - Performance Measures (0) New

5. The contact will receive email notification of the RA program's status once the program has gone through the review process.

7.9 Managing Training Programs

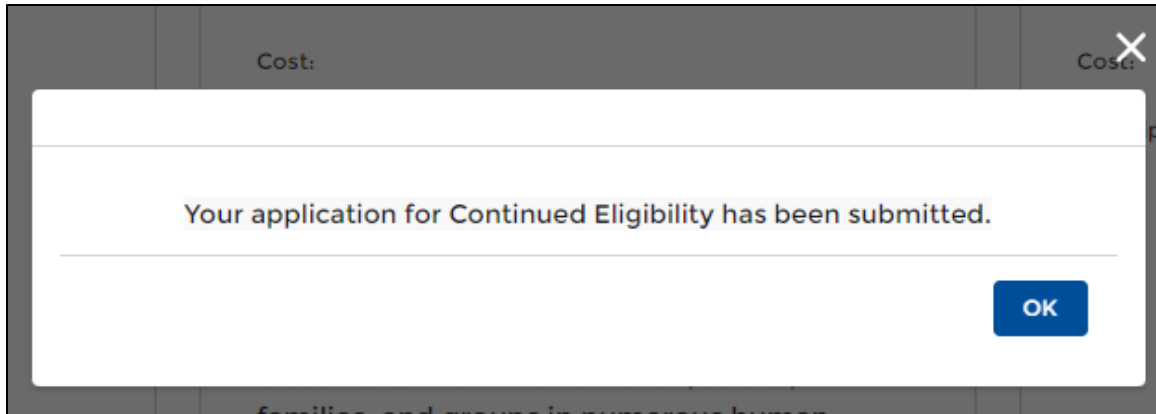
1. When a contact edits an approved training program, the ETP State Admin will be notified.
2. The Training Program will be moved to the **"Pending Final Approval"** stage.
3. Once the ETP State Admin has reviewed the changes, the status of the program will reflect in the portal.

7.10 Applying for Continued Eligibility

1. Training Providers can apply for Continued Eligibility 30 days prior to the expiry date.
Note: RA Programs do not expire.
2. The portal will display the option to **"Apply for Continued Eligibility"** 30 days before the program's expiry date. The contact can select the option and verify and change the details of the Training Program if needed.

The screenshot displays a web portal titled "Training Program". At the top right, there is a search bar labeled "Search Training Program" with a "Search" button. Below the search bar is a dropdown menu for "New Training Program" with the option "-Select Type of Training Program-". The main content area features two program cards. The first card is for "CDL" with the location "United States" and description "CDL Training". It has two buttons at the bottom: "View Details" and "Apply for Continued Eligibility". The second card is for "Welding RA Program" with the location "United States" and description "Welding RA program", featuring a "View Details" button. An orange arrow points to the "Apply for Continued Eligibility" button on the CDL card. At the bottom of the page, there are pagination controls: "<< First", "< Previous", "Showing 1 of 1 Page(s)", "Next >", and "Last >>".

3. The portal will also ask for the overall performance report, before triggering the review process.
4. Once the submission has been completed successfully for continued eligibility, the contact will see the message below.



5. The ETP contact will receive an email alerting the status of applied continued eligibility once the review process has been completed.

SECTION IV – PARTICIPANT SUPPORTS & WAGE DOCUMENTATION

Chapter 8 — Incentives & Stipends

This chapter provides procedures to ensure compliance and uniformity when entering incentives and stipends for WIOA youth participants in EmployOklahoma.

Stipends and incentives are not to be reported as a service. When an employer-employee relationship does not exist, a stipend may be used as an allowable payment for participation in activities such as occupational skills training or classroom activities, including high school equivalency preparation, work readiness, or employability skills training. Incentive payments to youth participants are permitted for recognition and achievement directly tied to training activities and work experiences.

8.1 Requirement

Per Youth Policy Guidance:

- Must be tied to 1 of the fourteen WIOA Youth Program Elements
- Must be planned and documented in the Individual Service Strategy (ISS) before provision.
- The budget must be accounted for before providing incentives or stipends. This should be planned out with the training budget in mind.
- Documentation must be uploaded prior to disbursement

8.2 Data Entry Process

Data Entry Process for Entering Incentives and Stipends in EmployOklahoma

1. *Included in the ISS:*

- Before an incentive or stipend can be issued, it **must** be planned and documented in the Individual Service Strategy.
- Enter the incentive/stipend details in the ISS section of the system, specifying:

- **Purpose:** Why the incentive/stipend is being provided (e.g., completion of a work experience, earning a credential).
 - **Program Element:** The specific element it supports.
 - **Amount and Frequency:** Whether it's a one-time payment or recurring.
 - The Individual Service Strategy must be signed whenever the plan is modified, including during the initial planning phase and any time an incentive or stipend is distributed upon the participant meeting the planned goal.
2. ***Add the Incentive/Stipend Amount to the Budget Section:***
The total incentive/stipend amount must be recorded in the Budget Section under the service cost of the specific Enrollment Service for which the incentive is being provided.
3. ***Upload Documentation:***
When providing the incentive or stipend, upload supporting documentation in the applicable “Enrollment Service” document section. Required documents include:
- **Proof of goal achievement or participation** (e.g., certificate, attendance record, employer verification).
 - **Proof of incentive/stipend payment** All expenses must be supported by clear, complete, and detailed documentation.
4. ***Enter the Payment in the Enrollment Service Funding Distribution Section:***
Once the incentive amount is added to the budget and the incentive/stipend goal has been completed, the payment details must be entered into the Enrollment Service Funding Distribution Section in the system. Ensure that the participant signs the ISS once the incentive/stipend has been provided.
5. ***Enter Financial Details in Enrollment Service Note***
Enter an “Incentive Note” in the enrollment service documenting the incentive/stipend financial details listed below. Utilize the “Add to Records” button and relate the note to the Participation Period
- Date of disbursement.
 - Amount provided.
 - Reason for disbursement (linked to ISS and program element).
 - Reference to uploaded documentation.

Chapter 9 — Supplemental Wages & Earnings

Employment information, including wages and earnings, must be recorded in the jobseeker’s contact profile. This data can be added at any time during or after program participation.

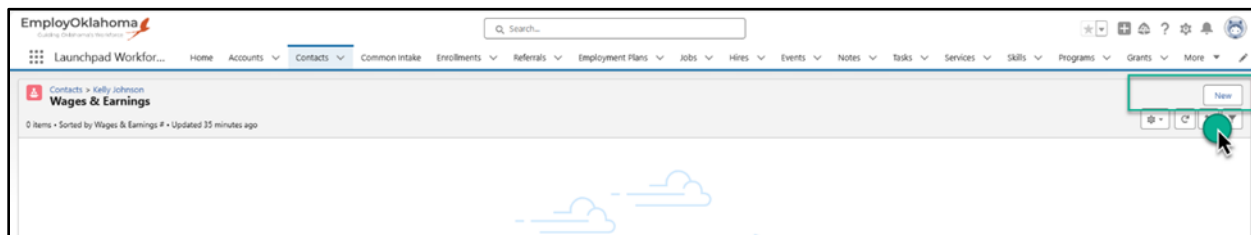
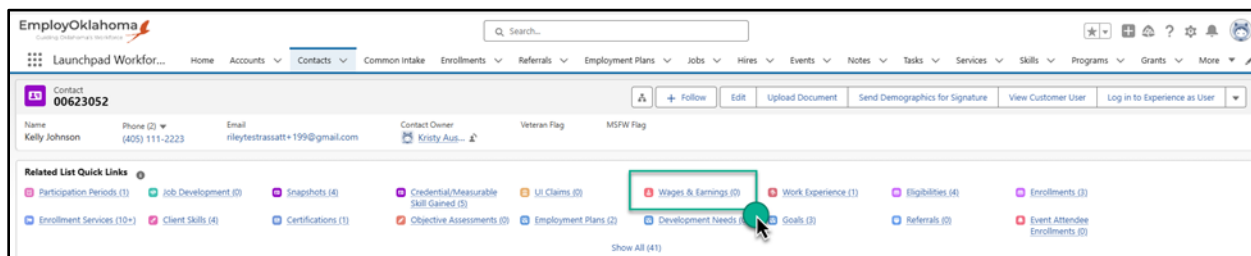
Employment-related reporting is essential for tracking performance metrics when quarterly wage records are unavailable or incomplete. The primary source for verifying participant

outcomes is Unemployment Insurance (UI) wage match data, obtained through state UI data records or the out-of-state wage record data exchange. When these records are unavailable, supplemental wage and earnings data may be collected for federal reporting.

The following guidelines outline the process for entering supplemental wage and earnings information in EmployOklahoma.

9.1 Creating a Supplemental Wage Record

On the jobseeker's contact page, select the **"Wages & Earnings"** object from the Related List Quick Links.



Enter New Wages & Earnings

To ensure accurate employment data entry, complete all the following fields:

* = Required Information

Wages & Earnings #	WAE-2362815	* Date	3/20/2025
Contact	Kelly Johnson	* Occupational Code	Secretaries and Administrative Assistants, Except Lega
* Employer	testing	NAICS Code	
SEIN		Employer	
* NAICS Code	484121	Quarter and Year	
Employer City		Wage Paid State	
Employer Country			
Employer State			
Employer Street			
Employer Zip			
External ID			

- **Date:** Enter the date the wages were earned (not reported or received). This date determines the performance quarter in which the employment record will be reported.
- **Occupational Code:** Enter the jobseeker's employment occupational code.
- **Employer:** Enter the employer's name
- **NAICS Code:** enter the employer's NAICS code.

Wage Information			
State Income Tax Withheld		Taxable Wages	
Educational Wages		Tips	
Pay Type	--None--	Excess Wages	
Out of State Wage	☐	Pay Rate	
Hours Worked		Pay Frequency	--None--

- **Taxable wages:** Enter the jobseeker's taxable earnings.
- **Pay Type:** Specify the type of pay (e.g., hourly, salary).
- **Pay Rate:** Enter the jobseeker's pay rate.
- **Hours Worked:** Enter the number of hours worked.
- **Pay Frequency:** Specify how often the jobseeker is paid (e.g., weekly, biweekly).

Work Information			
Employment Start Date		Employment End Date	
Primary Work Location Address		Primary Work Location City	
Primary Work Location State Code		Primary Work Location Zip	
Work Type	--None--	Employment Type	--None--

- **Employment Start Date:** Enter the date employment began
- **Employment End Date:** Enter the end date, if applicable.
- **Primary Work Location Address:** If different than employer's address, enter the work location.
- **Primary Work Location City:** If different than employer's city, enter the work location city.
- **Primary Work Location State Code:** If different than employer's state code, enter the work location state code.
- **Primary Work Location Zip:** If different than employer's zip code, enter the work location zip code.
- **Work Type:** Specify the type of work performed.
- **Employment Type:** Indicate full-time, part-time, temporary, or seasonal employment.

System Information

Created By [Redacted] Last Modified By [Redacted]

Legacy Data Source [Redacted] Legacy Source ID [Redacted]

Data Source: Supplemental Wages

- Data Source: Must always be **“Supplemental Wages.”**

Click **“Save”** to finalize entry.

SECTION V — DOCUMENTATION & COMMUNICATIONS

Chapter 10 — Notes & Activity Tracking

This chapter provides guidance on entering notes in EmployOklahoma.

Notes serve to provide additional information or context regarding a contact. They can be added to various records, including contacts, enrollments, employment plans, and more.

10.1 Create Notes

- **Jobseeker Notes:** Entered from the Contact page.
- **Enrollment Specific Notes:** Entered from the Participation Period page associated with the enrollment.
- **Enrollment Service Notes:** Used to provide context for the services provided. These should be entered from the Enrollment Service page, and **“Add to Record”** function must be utilized to attach the note to the related Participation Period.

How to Enter Notes

1. Navigate to the applicable page, then click on **“Notes”** from the Related List Quick Links section.

Contact Page: Select the **“Notes”** object from the Related List Quick Links.

Contact 00623052

Name: Kelly Johnson | Phone (2): (405) 111-2223 | Email: rileytestrassatt+199@gmail.com | Contact Owner: Kristy Aus... | Veteran Flag | MSFW Flag

Related List Quick Links

- Participation Periods (1)
- Job Development (0)
- Snapshots (4)
- Credential/Measurable Skill Gained (5)
- UI Claims (0)
- Wages & Earnings (0)
- Eligibilities (4)
- Enrollments (3)
- Enrollment Services (10+)
- Client Skills (4)
- Certifications (1)
- Objective Assessments (0)
- Development Needs (0)
- Goals (2)
- Referrals (0)
- Event Attendee Enrollments (0)
- Event Attendance Trackings (0)
- Saved Job (0)
- Search Histories (10+)
- Hires (0)
- Employment History (1)
- Exits (0)
- Follow Ups (0)
- Notes (2)**
- Contact History (1)
- External Job Search Activity (1)
- AJLA Enrollment Demographic
- Additional Contact Information (0)
- Approval History (0)
- TRA Allowances (0)

Participation Period

From the Contact page, select the active participation period, and select the “Notes” object from the Related List Quick Links.

Contact
00623052

Name: Kelly Johnson | Phone (2): (405) 111-2223 | Email: rileytestrassatt+199@gmail.com | Contact Owner: Kristy Aus... | Veteran Flag | MSFW Flag

Related List Quick Links

- Participation Periods (1)
- Job Development (0)
- Snapshots (4)
- Credential/Measurable Skill Gained (5)
- UI Claims (0)
- Eligibilities (4)
- Enrollments (3)
- Enrollment Services (10+)
- Client Skills (4)
- Certifications (1)

Show All (41)

Contacts > Kelly Johnson
Participation Periods

1 Item • Sorted by Date of Last Participation Service • Updated a few seconds ago

Participation Period #	Start Date	Date of Last Participation Service	Exit Date	Status
1 P-870181	1/12/2025	1/30/2025		Active

Participation Period
Kelly Johnson

Start Date: 1/12/2025 | Date of Last Participation Service: 1/30/2025 | Status: Active

Related List Quick Links

- Enrollments (2)
- Enrollment Services (8)
- Training Event Enrollments (0)
- Credential/Measurable Skill Gained (5)
- Snapshots (3)
- Assessments (0)
- Work Experience (0)
- Documents (0)
- Notes (1)**
- Participation Period History (1)

Enrollment Service

From the Enrollment page, select the Enrollment, then Enrollment Services, then the specific Enrollment Service name, select the “Notes” from the Related List Quick Links to add an Enrollment Service note. You must utilize the “Add to Record” function to attach the note to the related Participation Period.

Participation Period
Kelly Johnson

[+ Follow](#)
[Edit](#)
[New Note](#)
[Upload Document](#)
[Log Test Results](#)
[Create](#)

Start Date

1/12/2025

Date of Last Participation Service

1/30/2025

Status

Active

Related List Quick Links

- [Enrollments \(2\)](#)
- [Enrollment Services \(8\)](#)
- [Training Event Enrollments \(0\)](#)
- [Credential/Measurable Skill Gained \(5\)](#)
- [Snapshots \(3\)](#)
- [Assessments \(0\)](#)
- [Documents \(0\)](#)
- [Notes \(1\)](#)
- [Participation Period History \(1\)](#)

Participation Periods > P-800181
Enrollments

2 items • Updated a few seconds ago

☐	EnrollmentId	Program	Enrollment Date	Stage
1	Enrollment-2306023	Self Service/Information Only	1/12/2025	Enrolled
2	Enrollment-2306056	WIOA Adult	1/12/2025	Enrolled

Enrollment
Kelly Johnson

[+ Follow](#)
[Edit](#)
[Create/Update IEP](#)
[Submit for Approval](#)
[Upload Document](#)
[Create Follow Up](#)

Enrollment Date

1/12/2025

Stage

Enrolled

Related List Quick Links

- [Enrollment Services \(6\)](#)
- [Follow Ups \(0\)](#)
- [Notes \(1\)](#)
- [Documents \(4\)](#)
- [Enrollment History \(5\)](#)
- [AJLA Enrollment Demographic Snapshots \(1\)](#)
- [Service Funding Distributions \(4\)](#)
- [Approval History \(3\)](#)
- [UI Claims \(0\)](#)

Enrollments > Enrollment-2306056
Enrollment Services

6 items • Sorted by Actual End Date • Updated a few seconds ago

☐	Enrollment Service: Enrollment Service Name	Service Name
1	ES-4786308	Comprehensive and Specialized Assessments
2	ES-4786309	Development of Individual Employment Plan (IEP)
3	ES-4786505	Occupational Skills Training
4	ES-4791140	Work Experience

Enrollment Service

Kelly Johnson

Service

Occupational Skills Training

Stage

Scheduled

Related List Quick Links

Documents (1)

Enrollment Service History (3)

Service Funding Distributions (3)

Credential/Measurable Skill Gained (4)

Notes (0)

2. Click on **“New”** to add a new note.

Contacts > Kelly Johnson

Notes

2 items • Sorted by Last Modified • Updated a few seconds ago

Title	Text Preview	Created By	Last Modified	Last Modified By
1 Test MSG	TEST MSG note	Kayla Martinez	1/28/2025, 2:42 PM	Kayla Martinez
2 MSG - Skill Progression 2.4.25	Test MSG - Skills progression planned date of attainment 2.4.25	Kristy Austin	1/28/2025, 9:14 AM	Kristy Austin

3. Enter a title, compose the text, and enter the note. If the note needs attached to another related object, click **“Add to Record”**.

Title

Untitled Note

Visibility Set by Record

Compose text

B

I

U

↺

☰

☰

☰

☰

☰

☰

☰

Enter a note...

Related to

Kelly Johnson

Delete

Share

Add to Records

Done

4. Change the object and select the relevant record to attach the note. This could be a Participation Period, Enrollment, Enrollment Service, or any other related record. Click **Done**.

Add Note to Records

By default, a note on a record is visible to anyone with access to the record.

Search related records...

 Search Participation Periods... 

Add Note to Records

By default, a note on a record is visible to anyone with access to the record.

Search related records...

 Search Enrollments... 

Add Note to Records

By default, a note on a record is visible to anyone with access to the record.

Search related records...

 Search Enrollment Services... 

Jobseeker Contacts

The "**Date of Last Contact**" field on the Jobseeker Contact page shows the most recent date a jobseeker was contacted. This date updates automatically based on the latest recorded activity in any enrollment record. It reflects the most recent interaction across all enrollments.

Contact 00623052 [+ Follow](#) [Edit](#) [Upload Document](#) [Send Demographics for Signature](#) [View Customer User](#) [Log in to Experience as User](#)

Name: Kelly Johnson Phone (2): (405) 111-2223 Email: rileytestrassatt+199@gmail.com Contact Owner: Kristy Austin Veteran Flag: MSFW Flag

Contact Information

Participant ID	00623052	Email	rileytestrassatt+199@gmail.com
Birthdate	1/12/2007	Unique ID SSN	
Name	Kelly Johnson	Other Phone	(123) 456-7890
Phone	(405) 111-2223	MCI Number	
Date of Last Contact	2/20/2025	Account Name	OESC Job Seekers
Case Number		MSFW Flag	
Area/Country of Service		Contact Record Type	Job Seeker

All Jobseeker contact must be documented in the applicable Enrollment **“Activity”** section.

Contact 00623052 [+ Follow](#) [Edit](#) [Upload Document](#) [Send Demographics for Signature](#) [View Customer User](#)

Name: Kelly Johnson Phone (2): (405) 111-2223 Email: rileytestrassatt+199@gmail.com Contact Owner: Kristy Austin Veteran Flag: MSFW Flag

Related List Quick Links

- Participation Periods (1)
- Job Development (0)
- Snapshots (5)
- Credential/Measurable Skill Gained (6)
- UI Claims (0)
- Wages & Earnings (0)
- Work Experience (1)
- Eligibilities (5)
- Enrollments (4)
- Event Attendee Enrollments (0)
- Enrollment Services (10+)
- Client Skills (4)
- Certifications (1)
- Objective Assessments (0)
- Employment Plans (2)
- Development Needs (0)
- Goals (3)
- Referrals (0)

Show All (41)

Enrollments

4 items • Sorted by Enrollment Date • Updated a few seconds ago

Enrollmentid	Enrollment D...	Program	Office	Case Manager	Stage	Progress
Enrollment-2306023	1/12/2025	Self Service/Information Only			Enrolled	37.5%
Enrollment-2306056	1/12/2025	WIOA Adult	Okla Works - American Job Center - Main Office	Kristy Austin	Enrolled	37.5%
Enrollment-2306317	1/13/2025	WIOA Youth	Okla Works - American Job Center - Chandler	Kristy Austin	Enrolled	37.5%
Enrollment-2324905	3/7/2025	WIOA Dislocated Workers	Okla Works - American Job Center - Pauls Valley- Satellite Center	Connie Frazier	Enrolled	37.5%

Enrollment Kelly Johnson [+ Follow](#) [Edit](#) [Service Entry](#) [Training Service Entry](#) [Create/Update IEP](#) [Submit for Approval](#) [Upload Document](#)

Enrollment Date: 1/12/2025 Stage: Enrolled

Related List Quick Links

- Enrollment Services (0)
- Follow Ups (0)
- Notes (1)
- Documents (4)
- Enrollment History (5)
- AJLA Enrollment Demographic Snapshots (1)
- Employment Plans (1)
- Service Funding Distributions (5)
- Approval History (3)
- UI Claims (0)

Enrollment Name	Kelly Johnson-WIOA Adult-012025	Enrollment Date	1/12/2025
Contact	Kelly Johnson	Stage	Enrolled
Program	WIOA Adult	Exit Date	
Case Manager	Kristy Austin	Date of Last Completed Service	3/7/2025
Office	Okla Works - American Job Center - Main Office	Participation Period #	P-870181
Date of Last Reportable Individual Svc	1/28/2025		

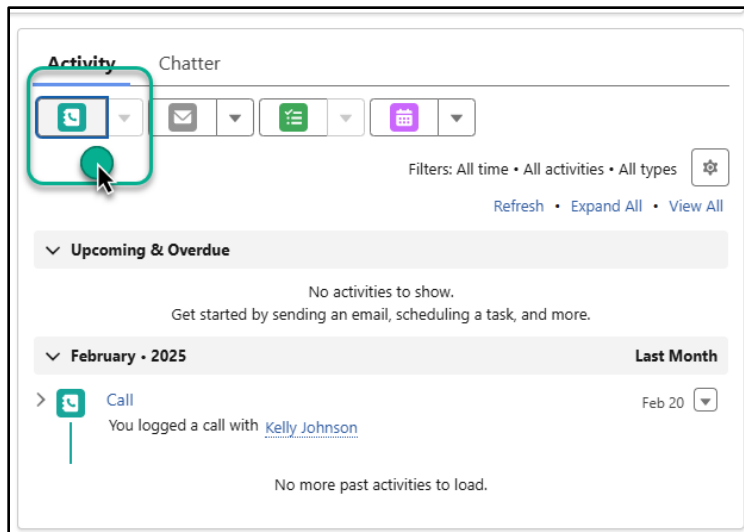
Activity Chatter

1 2 3 4 Filters: All time • All activities • All types

Upcoming & Overdue

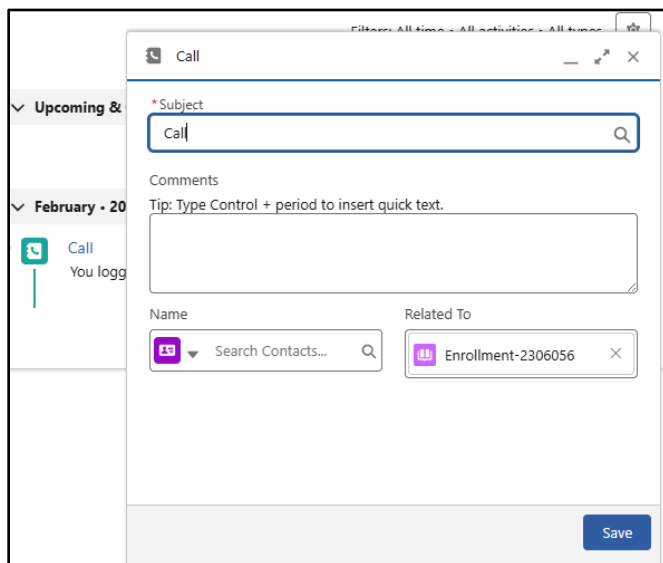
10.2 Log a Call

1. In the **“Activity”** component, locate and click **“Log a Call”**.



2. Enter relevant details such as:

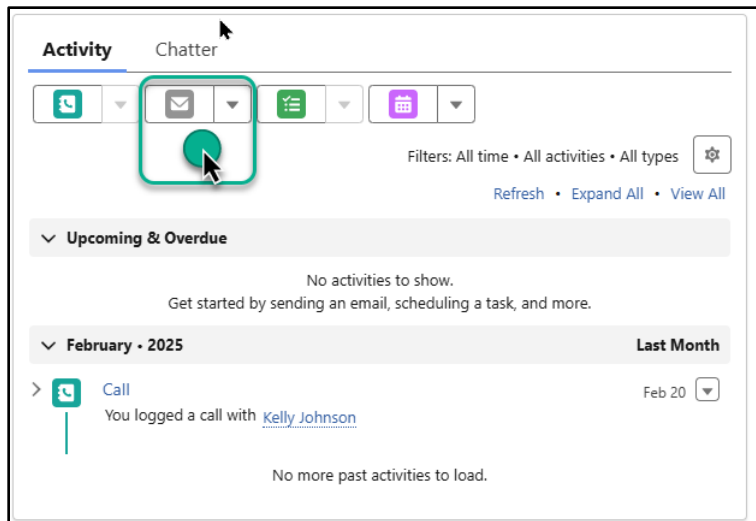
- **Subject** – Briefly describe the purpose of the contact.
- **Comments** – Include any relevant notes or details about the interaction.
- **Jobseeker's Name** – Identify the jobseeker involved.
- **Related Enrollment (Related To)** – Specify the enrollment associated with the contact.



3. Click **“Save”** to log the call.

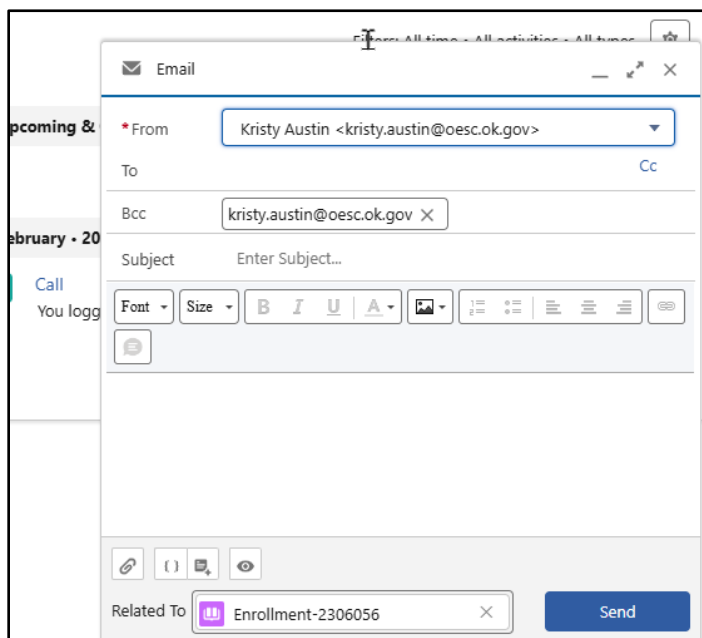
10.3 Send an Email

1. In the **“Activity”** component, locate and click **“Email”**



2. When composing an email, include the following details:

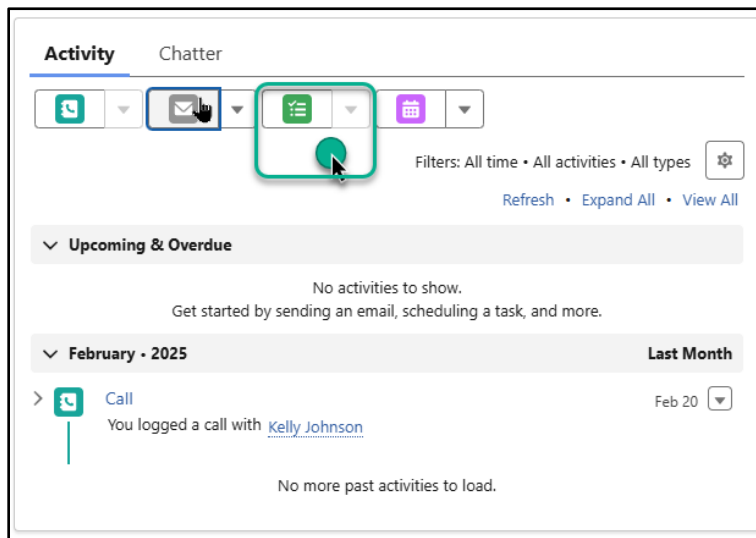
- **Recipients** – Add the necessary email addresses.
- **Subject** – Provide a clear and relevant subject line.
- **Content** – Write the message with all the required details.
- **Attachments** – Include any necessary files.
- **Related Enrollment (Related To)** – Specify the enrollment associated with the contact.



3. Click **“Send”** to send the email.

10.4 Create a Task

1. In the **“Activity”** component, locate and click **“Task”**

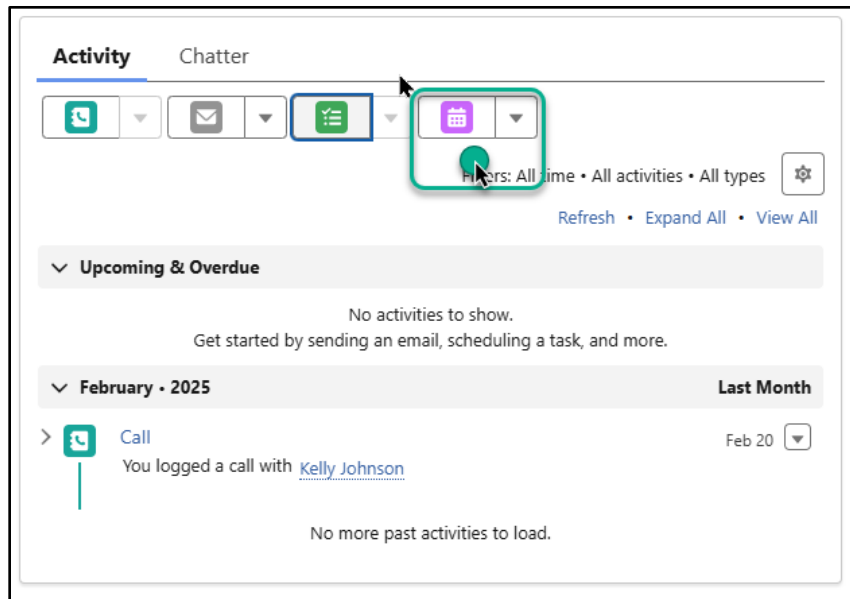


2. When creating a task, enter the following relevant details:
 - **Subject** – Provide a brief description of the task.
 - **Due Date** – Set the deadline for completion.
 - **Assigned Staff Member** – Specify who is responsible for the task.
 - **Jobseeker's Name** – Identify the jobseeker associated with the task.
 - **Related Enrolment (Related To)** – Indicate the enrollment linked to the task.

3. Click **“Save”** to create the task.

10.5 Schedule an Event

1. In the “**Activity**” component, locate and click “**Event**”



2. When scheduling an event, enter the following relevant details:
 - **Subject** – Provide a clear event title.
 - **Type of Contact** – Specify the nature of the interaction (e.g. meeting, call, interview).
 - **Date** – Set the event date.
 - **Description** – Include relevant details or objectives.
 - **Assigned Staff Member** – Indicate who is responsible for the event.

The screenshot shows a 'New Event' form in a Salesforce interface. The form has the following fields and components:

- Subject:** A text input field with a search icon and a red error message 'Complete this field.' below it.
- Type of Contact:** A dropdown menu currently showing '--None--'.
- Start:** Two sub-fields for '*Date' (showing 'Mar 12,') and '*Time' (showing '4:00 PM').
- End:** Two sub-fields for '*Date' (showing 'Mar 12,') and '*Time' (showing '5:00 PM').
- Description:** A text area with a tip: 'Tip: Type Control + period to insert quick text.'
- Assigned To:** A dropdown menu showing 'Kristy Austin' with a user icon and a close button.
- WISPR Category Description:** A dropdown menu showing '--None--'.
- Reason for Staff Visit to Employer:** A dropdown menu showing '--None--'.
- Save:** A blue button at the bottom right of the form.

3. Click **“Save”** to schedule the event.

Chapter 11 — Sending Emails following Salesforce Domain Verification Requirements

This chapter provides guidance to Title I staff and service providers on the required process for sending emails through the EmployOklahoma system following Salesforce’s implementation of domain verification requirements, ensuring secure and successful communication with jobseekers.

Salesforce enforced strict domain ownership verification beginning March 9, 2026. This requirement adds an additional layer of security to the existing user-level email address verification process.

Under this update, Salesforce will only send user-authored emails from verified domains. As a result, email domain verification is now mandatory, and emails sent from unverified domains will not be delivered.

This requirement does not affect emails sent from OESC.OK.GOV addresses, as those domains are already verified within the EmployOklahoma environment.

However, service providers and board email domains are not currently verified in the EmployOklahoma environment. Because of this, staff must ensure they follow the required steps when sending emails through the Activities section in Salesforce.

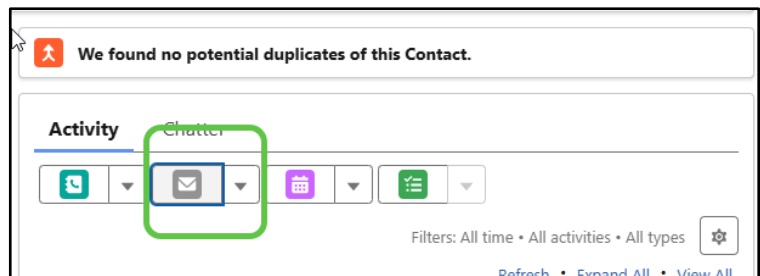
Please follow the instructions below when sending emails from Activities to ensure successful delivery.

Open the Jobseekers Record

- Navigate to the Activity section

Click “Email”

- Select Email

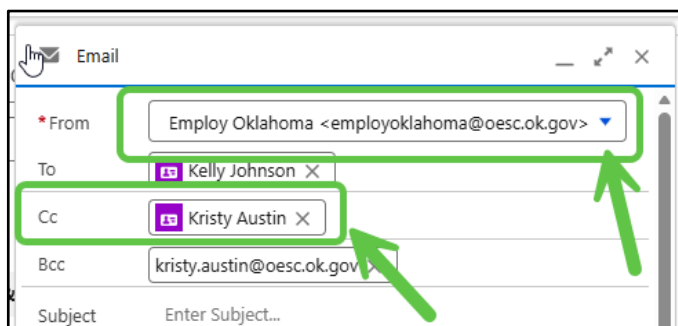


Verify the “From” Address

- Select the employoklahoma@oesc.ok.gov email address from the dropdown

Enter your email in the CC field

- Ensure that you enter your email address in the CC field so that it is visible to the jobseeker, even though it is currently included in the BCC field.



Enter the Subject

- Enter the subject of the email

Compose your Message

- Type your email message
- Add the following note to each email sent
 - *Please note: This message was sent from a mailbox that is not monitored and replies to this email will not be received. For assistance, please reply all to reach the appropriate recipients or contact me directly at [your email] or [your phone number].*

Related To

- Relate the email to any required objects

SECTION VI — FOLLOW-UP

Chapter 12 — Follow-Up Entry

This chapter provides guidance to clarify the process for documenting follow-up services in EmployOklahoma.

The steps listed below outline the process for entering required 2nd quarter and 4th quarter after-exit Placement Follow-Up services in EmployOklahoma. This guidance is primarily intended for Youth participants, but the same process also applies to Adult participants to meet WIOA follow-up reporting requirements.

12.1 Entering a Follow Up

1. Hover over the **“Follow Ups”** quick link inside the enrollment.
2. Then select **“New”**

Enrollment
Kelly Johnson

Enrollment Date: 1/12/2025
Stage: Enrolled

Related List Quick Links

- Enrollment Services (10+)
- Follow Ups (0)**
- Notes (1)
- Documents (5)
- Enrollment History (5)
- AJLA Enrollment Demographic
- Employment Plans (1)
- Service Funding Distributions (7)

Follow Ups
0 items • Sorted by Follow Up Date • Updated a few seconds ago

Buttons: [Filter] [Clear] **New**

Follow Up Name	Type	Follow Up Date ↑	Status	Assigned To

View All

3. Complete the following fields:

- Follow Up Name (required)
- Assigned To (required)
- Contact (required)
- Status (required)
 - **Must** be set to **“Completed”**
- Type (required)
 - Youth Placement (required); or
 - Adult Placement
- Follow Up Date (required)
 - Must be the day the follow up was completed, and the date must be within the 2nd quarter after exit or 4th quarter after exit- whichever is applicable.
- Occurrence (required)
 - 2nd Quarter; or
 - 1 year (4th Quarter)
- Outcome (required; do not leave blank instead select **“No Placement”**)
 - Occupational Skills Training
 - Post-secondary Education
 - Secondary Education; or
 - No Placement
- Participation Period # (required)
- Enrollment (should auto-fill; add if missing)
- Enrollment Service # (required)
- Exit (if applicable)
- Comments (if applicable)

4. Click **“Save”**.
5. The follow up will now be visible on the Contact page, under the **“Follow Ups”** quick link.

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APPENDIX A— WORKFORCE SYSTEM ACRONYMS

This appendix provides commonly used workforce system acronyms referenced throughout the EmployOklahoma Case Management Operations Handbook and associated workforce system operations.

This appendix is intended to:

- support statewide terminology consistency,
- assist new staff onboarding,
- improve operational understanding,
- and provide a centralized workforce terminology reference.

A.1 Workforce System Acronyms

Acronym	Definition
AJC	American Job Center
CFR	Code of Federal Regulations
DOL	United States Department of Labor
DW	Dislocated Worker
DWG	Dislocated Worker Grant
ETA	Employment and Training Administration
ETPL	Eligible Training Provider List
ETP	Eligible Training Provider
HHS	Department of Health and Human Services
LE	Labor Exchange
LWDB	Local Workforce Development Board
LLSIL	Lower Living Standard Income Level
MSG	Measurable Skill Gain
OESC	Oklahoma Employment Security Commission
OJT	On-the-Job Training
O*NET	Occupational Information Network
OA	Office of Apprenticeship
OSO	One-Stop Operator
OSY	Out-of-School Youth
RA	Registered Apprenticeship
RESEA	Reemployment Services and Eligibility Assessment
TA	Technical Assistance
TEGL	Training and Employment Guidance Letter
TEN	Training and Employment Notice
UI	Unemployment Insurance
USDOL	United States Department of Labor
VR	Vocational Rehabilitation
WP	Wagner-Peyser
WEX	Work Experience
WIOA	Workforce Innovation and Opportunity Act

A.2 EmployOklahoma & Case Management Acronyms

Acronym	Definition
CIP	Classification of Instructional Programs
DOB	Date of Birth
FEIN	Federal Employer Identification Number
IEP	Individual Employment Plan
ISS	Individual Service Strategy
PP	Participation Period
RA Program	Registered Apprenticeship Program
SBE	Significant Barrier to Employment
TAA	Trade Adjustment Assistance
UI Exhaustee	Individual who has exhausted UI benefits

A.3 Veteran Service Acronyms

Acronym	Definition
DVOP	Disabled Veterans' Outreach Program Specialist
JVSG	Jobs for Veterans State Grants
LVER	Local Veterans' Employment Representative
TAP	Transition Assistance Program
TSM	Transitioning Service Member

A.4 Youth Program Acronyms

Acronym	Definition
AEFLA	Adult Education and Family Literacy Act
ELA	English Language Acquisition
HSE	High School Equivalency
ISY	In-School Youth
OSY	Out-of-School Youth
TABE	Test of Adult Basic Education

A.5 Fiscal & Funding Acronyms

Acronym	Definition
CFR	Code of Federal Regulations
OMB	Office of Management and Budget
PII	Personally Identifiable Information
PO	Purchase Order
UGG	Uniform Grants Guidance

A.6 Performance & Reporting Acronyms

Acronym	Definition
PIRL	Participant Individual Record Layout

Q2	Second Quarter After Exit
Q4	Fourth Quarter After Exit
USDOL ETA	United States Department of Labor Employment and Training Administration

A.7 Technology & System Acronyms

Acronym	Definition
Adobe Sign	Electronic Signature Platform
CRM	Customer Relationship Management
EO System	EmployOklahoma System
MFA	Multi-Factor Authentication
Salesforce	EmployOklahoma system platform environment

A.8 Common Operational Terms

Acronym	Definition
Add to Record	Function used to attach records to related objects
Follow-Up	Post-exit participant outcome tracking
Participation Period	Active enrollment participation timeframe
Enrollment Service	Participant service activity within enrollment
Funding Distribution	Payment tracking object
Service Delivery Method	Method by which service is provided
Self-Attestation	Participant self-certification process

A.9 Acronym Usage Reminder

IMPORTANT

Staff should avoid excessive acronym usage when communicating with participants or external customers unless:

- the acronym is commonly understood,
- or the term is fully explained during communication.

IMPORTANT

Case notes and participant-facing communications should remain clear, professional, and understandable to the intended audience.

APPENDIX B — GLOSSARY

Purpose

This appendix provides definitions for commonly used operational, case management, workforce system, and EmployOklahoma terminology referenced throughout this handbook.

This glossary is intended to:

- support statewide terminology consistency,
- improve operational understanding,
- assist new staff onboarding,
- and provide a centralized reference for workforce system terminology.

B.1 General Workforce Terms

Adult Participant

An individual receiving services through the WIOA Adult program who meets applicable program eligibility requirements.

American Job Center (AJC)

A workforce system service location providing access to employment, education, training, and supportive services through required and additional workforce partners.

Barrier

A condition, circumstance, or characteristic that may negatively impact a participant's ability to obtain or retain employment, complete education or training activities, or successfully participate in workforce services.

Case Management

The coordination, documentation, planning, monitoring, and support activities provided to participants throughout workforce program participation.

Career Service

A workforce service designed to support participant employment, career planning, skill development, or workforce readiness activities.

Credential

A recognized degree, certificate, certification, diploma, or industry-recognized document awarded upon successful completion of education or training requirements.

Data Validation

The process of verifying the accuracy, completeness, and consistency of participant records, documentation, and reported workforce system data.

Direct Linkage

A technology-supported connection providing participants with direct, real-time access to workforce program staff or services.

Dislocated Worker

An individual meeting WIOA Dislocated Worker eligibility criteria due to layoff, closure, displacement, or related qualifying employment circumstances.

Documentation

Source records or supporting materials used to verify participant eligibility, activity, service delivery, fiscal expenditures, or workforce outcomes.

Enrollment

The formal process through which a participant is approved to receive workforce program services within EmployOklahoma.

Enrollment Service

A documented participant service activity entered within an active Enrollment record.

Exit

The point at which a participant has not received a qualifying service for the applicable period defined by program requirements.

Follow-Up

Post-exit participant tracking and support activities used to document employment, education, or training outcomes after program participation ends.

Funding Distribution

The system component used to document participant payment activity, fiscal expenditures, reimbursements, or incentive disbursements.

Individual Employment Plan (IEP)

A participant-centered employment planning document used primarily for Adult participants receiving individualized career services.

Individual Service Strategy (ISS)

A participant-centered planning document used primarily for Youth participants to document goals, barriers, services, and workforce activities.

Low Income

A participant status determined using WIOA income guidelines, poverty thresholds, public assistance receipt, or other allowable qualifying criteria.

Measurable Skill Gain (MSG)

A documented indicator demonstrating participant progress toward credential attainment, education completion, or training achievement during participation.

Monitoring

Oversight activities conducted to evaluate compliance, documentation sufficiency, fiscal accountability, and operational consistency.

Participation Period

The timeframe is associated with an active participant enrollment within a workforce program.

Program Exit

The official closure of participant participation after no qualifying services have been received within the applicable exit window.

Referral

The documented process of connecting a participant to workforce services, supportive services, training opportunities, or partner programs.

Self-Attestation

A participant's signed statement is used to verify allowable eligibility or demographic information when permitted under policy guidance.

Service Delivery Method

The method through which workforce services are provided to participants, including in-person, virtual, or other approved formats.

Significant Barrier to Employment (SBE)

A qualifying veteran-related barrier used to determine eligibility for JVSG/DVOP individualized career services.

Supplemental Wage

A documented wage support or reimbursement activity associated with participant employment or work-based learning activities.

Supportive Service

A service provided to assist participants with barriers impacting participation or employment success.

Examples may include:

- transportation,
- childcare,
- housing assistance,
- or work-related support.

Training Service

A workforce service associated with occupational skills training, credential attainment, work-based learning, or educational activities.

Work Experience (WEX)

A planned structured learning activity designed to provide participants with workplace skills and employment exposure.

B.2 EmployOklahoma System Terms**Activity Component**

The section within EmployOklahoma used to document participant calls, tasks, events, emails, and related participant interactions.

Add to Record

A system function used to associate notes or activities with related records such as Participation Periods or Enrollment Services.

Contact Record

The participant profile containing demographic, eligibility, enrollment, and workforce activity information.

Enrollment Stage

The system status reflecting the current progression of an Enrollment record (e.g., Pending Approval, Enrolled).

Funding Distribution Record

The section within EmployOklahoma used to track fiscal disbursements or participant payments.

Related List Quick Links

System navigation shortcuts are used to access associated participant records or workforce activities.

Service Cost

The documented projected or actual fiscal amount associated with a participant service activity.

Training Service Outcome

The documented result or status associated with a participant training activity.

B.3 Follow-Up & Performance Terms**2nd Quarter After Exit**

The reporting period used to evaluate participant employment or education outcomes during the second quarter following exit.

4th Quarter After Exit

The reporting period used to evaluate participant employment or education outcomes during the fourth quarter following exit.

No Placement

A documented follow-up outcome indicating no verified employment, education, or training placement was obtained.

Outcome

The documented result is associated with a referral, follow-up activity, training service, or workforce activity.

B.4 Fiscal & Documentation Terms**Incentive**

A participant payment issued to recognize achievement, participation, progress, or completion of allowable workforce activities.

Payroll Documentation

Records used to verify participant wages, employer reimbursement activity, or supplemental wage support.

Stipend

An allowable participant payment is issued when an employer-employee relationship does not exist during participation activities.

Supporting Documentation

Source documentation used to verify participant eligibility, service participation, expenditures, or workforce outcomes.

B.5 Glossary Usage Reminder**IMPORTANT**

Definitions contained within this glossary are operational handbook definitions intended to support consistent statewide usage.

IMPORTANT

Where conflicts exist between handbook terminology and:

- federal law,
- federal regulation,
- TEGL guidance,
- or official policy issuance,

the governing federal or state authority controls.