

WORKFORCE and ECONOMIC DEVELOPMENT

GUIDELINES



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OKLAHOMA
CareerTech

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CTIMS / IMD SUPPORT SERVICES and RESOURCES

[CTIMS Main Web Page](#)

[Economic Development Initiatives](#)

[CTIMS EDI Training Video](#)

[CTIMS EDI Complete User Guidebook](#)

[TIP Process Video](#)

[OCAS Codes for WED](#)

[WED Enrollment Guidebook](#)

[Business Master Guidebook](#)

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WORKFORCE and ECONOMIC DEVELOPMENT (WED) PROGRAMS and ECONOMIC DEVELOPMENT INITIATIVES

PROGRAMS

Adult and Career Development (ACD)

Central Technology Center *Refresher* Truck Driver Training

Central Technology Center *Statewide* Truck Driver Training

Client-Based Consulting Services (SBM/SET/BES/ABM)

Customized Industry Training or Government Training

Safety for Government Entities or Safety for Industry

Small Business and Incubator

ECONOMIC DEVELOPMENT INITIATIVES (EDI)

Incubator Grants

Firefighter Training (FFT)

Oklahoma APEX (OkAPEX) Accelerator (*formerly OkPTAC*)

Safety Training Grants

Training for Industry Growth (TIG)

Training for Industry Program (TIP)

ACRONYMS and DEFINITIONS

ACD	Adult and Career Development
ABM	Agri-Business Management
BES	Business and Entrepreneurial Services
BIS	Business and Industry Services
CDL	Commercial Driver's License
CST	Customized and Safety Training
CTIMS	CareerTech Information Management System
CTIMS PEF	CareerTech Information Management System Program Enrollment Form
DOD	Department of Defense
EDI	Economic Development Initiatives
ESL	English as Second Language
FFT	Firefighter Training
FQ	Fiscal Quarter
FTE	Full-Time Equivalent
GED	General Education Development
IMD	Information Management Division (ODCTE)
ODCTE	Oklahoma Department of Career and Technology Education
OJT	On-the-Job Training
OkAPEX	Oklahoma APEX Accelerator (<i>formerly OkPTAC</i>)
OLT	Online Training
OMES	Office of Management and Enterprise Services
OSDH	Oklahoma State Department of Health
NAICS	North American Industry Classification System
PEF	Program Enrollment Form
PID	Position Identification
RC	Regional Coordinator
RTI	Related Technical Instruction
SAS	Local Student Accounting System
SBM	Small Business Management
SET	Self-Employment Training
SOU	Statement of Understanding
TIG	Training for Industry Growth
TIP	Training for Industry Program
TDT	Truck Driver Training
VC	Virtual Class
WED	Workforce & Economic Development

Contact Hours - Number of Enrollments multiplied by Number of Class/Course Hours

For example, a 4-hour class with 20 students would equal 80 Contact Hours (20 x 4=80). An 8-hour class taught over 4 days for 20 students would equal ((8 x 4) x 20 = 640 Contact Hours)

CST - Customized and Safety Training Formula Funding - Based on the availability of state funding, CST Formula Funding is allocated at the beginning of each fiscal year to each Technology Center.

99999 – Business Code for enrollments, when training or consulting is not employer or industry sponsored.

GENERAL INFORMATION and FUNDING

Workforce Economic and Development (WED) Guidelines outline how the Oklahoma Department of Career and Technology Education (ODCTE) will exercise stewardship of taxpayer dollars through various funding programs. These include the Customized and Safety Training (CST) Formula funding, Economic Development Initiatives (EDI) funding, specific program funding and grants. The WED division of ODCTE administers these funds, with oversight from ODCTE administration. For questions regarding funding or processes, contact the appropriate Regional Coordinator (see Contacts).

Funding Sources and Principles

- Funding comes from various sources, each with specific requirements and limitations.
- Participation in training initiatives using these funds is determined by local technology centers in collaboration with the WED division.
- Projects are evaluated based on sound business principles and statewide economic impact.
- Funding supports, but does not replace, technology center costs for offering classes and training services to district businesses.

Eligible Funding Uses

- Apprenticeships
- Customized Industry Training
- Incubator Grants
- OkAPEX Accelerator (formerly OkPTAC)
- Safety Grants
- Safety Training for Government Entities or Industry
- Tribal Business Entities
- Volunteer Firefighter Training
- Workforce Development (TIP and TIG)

Technology Center Responsibilities

- Analyze district industry training needs and design programs for maximum benefit.
- Consider pooling resources for larger projects or industries served by multiple districts.

Allowable Expenses

- Instructor salaries
- Training-related equipment
- Curriculum and curriculum development (up to 2% of the total training request, excluding consumables, supplies, and books)
- Instructional supplies

Non-Allowable Expenses

- Indirect costs
- Building construction, remodeling, or leasing

For specific guidelines on funding eligibility, refer to the Program Type sections. Participation in training initiatives using these funds is determined by the local technology center and the WED Division. See Page 3 for a list of non-reimbursable training activities.

CUSTOMIZED and SAFETY TRAINING (CST) FORMULA FUNDING and PAYMENTS

CST Formula Funding Payments

- **Annual Allocation:** At the start of each fiscal year, and based on available funds, ODCTE provides each tech center with their fiscal year allocation, calculated using the CST Formula (below).
- **Monthly Payments:** Payments are made in 12 equal monthly installments, recorded using specific revenue codes:
 - Type 21: Project code 448, Revenue code 3848
 - Type 31: Project code 433, Revenue code 3833
- **Effective FY25, Type 01 (Apprenticeship) Revenue codes will no longer be eligible for CST Formula Funding.**

CST Formula Funding Calculations

- Tech centers submit training documentation to ODCTE based on the criteria for each Type Code as stated in these guidelines.
- The Information Management Division (IMD) at ODCTE reviews submitted enrollment data.
- **Eligible:**
 - **Program Type 31 (Customized Industry Training):** Includes courses meeting Type 31 criteria with eligible North American Industry Classification System Codes (NAICS). [NAICS Codes](#)
 - **Eligible Entities:**
 - i. Local City Government
 - ii. Local County Government
 - iii. Tribal Industries (casinos, stores, hotels and childcare facilities)
 - **Non-Eligible Entities:**
 - iv. State Government
 - v. Federal Government
 - vi. Tribal Government, Education entities
 - **Program Type 21 (Safety Training):**
 - **All NAICS codes are eligible.**
 - **Program Type 15 (ACD Training):**
 - Classes must have a career objective in the syllabus.
 - If 50% or more of students have eligible employer NAICS codes for Type 31 and the training is job-related, the entire class should be reported as a Type 31. Students do not all have to be sponsored by the same employer.
 - ACD classes conducted in a technology center district by another technology center are eligible for formula funding if approved by the technology center assigned to that district.
- **Non - Eligible:**
 - **Effective FY25, Type 01 (Apprenticeship) hours will no longer be eligible for CST Formula Funding.**
 - Students coded as open enrollment (99999) with no employer NAICS code.

*Link to North American Industry Classification System (NAICS) codes: [NAICS Codes](#)

NON-REIMBURSEABLE ACTIVITIES:

Personal interest classes, with no career objective, are to be reported as the appropriate non-reimbursable type code (60, 61, 62, 75, 78) described on page 23.

Training activities **not eligible** for reimbursement using WED funding sources:

- Professional development for technology center personnel or boards of education (except for safety training).
- Political or community fund raising activities.
- Religious organization meetings or functions.
- Receptions, meal functions or style shows.
- Commercial exhibits, fairs or promotional activities.
- Open houses or student organization meetings.
- Industry, public school or organizational staff meetings, conventions or team meetings.
- Non-commercial driver education courses, DUI School or driver improvement and defensive driving classes delivered as open enrollment classes.
- Job search, career exploration, employment skills, career development and career search.
- Training conducted for incarcerated people or students who are not residents of Oklahoma.
- Driving time.
- Hunter safety, boat safety or concealed weapons training and recreational activities/training.
- Third-party rental of facility use.
- Lab preparation time.

ECONOMIC DEVELOPMENT INITIATIVES (EDI) and GRANT FUNDING

Based upon the availability of funds, participation in training initiatives using EDI funding is determined by the local technology center in collaboration with the Workforce and Economic Development (WED) Division. All qualifying projects must be approved by the appropriate ODCTE state staff to be considered ready to train. The official start date of the project will be reflected in CTIMS. **Before training may begin or purchases are reimbursable, a P.O. must be issued by ODCTE and entered into CTIMS.** See *CTIMS-EDI Approval Process Overview* in the Appendix.

Economic Development Initiative (EDI) funding includes:

- Incubator Grants
- Safety Grants
- Training for Industry Growth (TIG)
- Training for Industry Program (TIP)
- Volunteer Firefighter Training (FFT)*

TIP and TIG Funding: EDI funding directed to Training for Industry Growth (TIG) and Training for Industry Program (TIP) projects will be considered for approval on a project-by-project basis*. TIP & TIG funding is intended to serve companies who are expanding workforces and export goods and services and/or supply exporters within the following identified ecosystems:

- Aerospace and Defense
- Agriculture and Biosciences
- Energy
- Health
- Information and Financial Service
- Manufacturing
- Transportation and Distribution

***Refer to the Program Type sections for specific guidelines regarding funding eligibility.**

Method for Distributing Funds: Projects will be considered for approval on a project-by-project basis, based on the availability of funds.

TIG and TIP: Projects will be funded based on a scoring process utilizing the Return on Investment (ROI) calculator. Those proposals with the lowest ROI will have priority in funding. A high ROI score could keep a TIP or TIG project from being eligible for funding.

DEADLINES for EDI (TIP, TIG) & Grants (Safety, Incubator): Once funds are designated for a specific project, the following timeline must be followed:

1. Upon allocation of EDI or Grant funds to a technology center, an agreement must be initiated in CTIMS, by the Technology Center Representative or Coordinator, within fifteen (15) business days.
2. **Training must begin within sixty (60) calendar days of the purchase order being entered into CTIMS.** If training does not start within the first sixty days, the allocated funds will be removed.
3. Status of training will be verified by the Regional Coordinator through active invoicing, current program enrollment forms (PEFs), or dated sign-in sheets/rosters.

***Note: Firefighting Training (FFT) funds** are allocated at the beginning of the fiscal year and assigned a P.O. in CTIMS. **The deadlines above, are not applicable to FFT funds.**

EDI and GRANT APPLICATION PROCESS

Prior to making application, review the EDI and grant descriptions for eligibility requirements. Your Regional Coordinator (RC) can help in determining qualifying projects.

Application and Reimbursement - EDI project applications will be accomplished through the CTIMS system.

1. **The Technology Center encumbers all costs of an EDI training project prior to reimbursement.**
 - a. The Technology Center must have a Purchase Order (P.O.) – issued by their technology center - prior to making application in CTIMS.
2. **A P.O. must be issued by ODCTE and entered into CTIMS before training may begin or purchases made.**

Technology Centers

1. Technology Center (TC) Coordinator will create an **EDI Training Budget Proposal**, utilizing the [EDI Worksheet.xlsx](#).
 - a. The proposed budget (xlsx file) will provide details outlining *specific direct* costs associated with the training. See [CTIMS EDI Training Video](#) on how to complete the EDI Worksheet and EDI application process in CTIMS.
 - b. Items technology centers may include in funding agreements: instructor salaries, training related equipment, curriculum development (up to 2% of the total TIP training funds, excluding consumables), and instructional supplies.
 - c. Funds may **not** be used for indirect costs, building construction, remodeling or leasing of facilities.
2. Email EDI Budget Proposal (*EDI Worksheet*) – with *required documentation** - to appropriate Regional Coordinator for review and approval.
 - **TIG** application – attach *Letters of Commitment* from two or more participating companies
 - **FFT, Safety, Incubator** application – attach Vendor/Provider proposals or price quotes where applicable.
 - **TIP** application – refer to the [TIP Process Video](#) for more information.
3. Upon approval by the State Supervisor, an allocation will be made in CTIMS. **Technology Center must have its own purchase order in the amount of the allocation, in place prior to submitting an Agreement in CTIMS.**
4. After allocation of funds in CTIMS, the Technology Center Coordinator has 15 business days to create and submit the appropriate worksheet in CTIMS with attached EDI Budget Proposal (.xlsx) and other supporting documentation. Refer to [CTIMS EDI Complete User Guidebook](#) for instructions.
5. Once the worksheet is fully approved, TC Coordinator will initiate and submit an **Agreement** in CTIMS. Refer to [CTIMS EDI Complete User Guidebook](#) for instructions.
6. Upon the final approval of an EDI Agreement, a Statement of Understanding (SOU) between ODCTE and the technology center will be generated in CTIMS.

7. After the SOU is acknowledged and approved in CTIMS by the appropriate technology center and ODCTE staff, a P.O. will be assigned by the ODCTE Finance Division and entered into CTIMS by the State Requisition Coordinator. **Training cannot take place until the PO is entered in CTIMS by the State Requisition Coordinator.**
 - a. The TC Coordinator will receive an email, generated through CTIMS, when the P.O. has been entered.
 - b. **Training must begin within sixty (60) calendar days of the purchase order being entered into CTIMS. If training does not start within the first sixty days, the allocated funds will be removed.**
 - c. Status of training will be verified by the Regional Coordinator through active invoicing, current program enrollment forms (PEFs), or dated sign-in sheets/rosters.

Before training may begin or purchases are reimbursable, a P.O. must be issued by ODCTE and entered into CTIMS.

See *CTIMS-EDI Approval Process Overview* in the Appendix or [CTIMS EDI Training Video](#) for more information on the EDI application process in CTIMS.

Modifications to Worksheets and Agreements

All proposed project changes must be submitted in CTIMS **prior to** beginning the affected training. Change requests and Budget Adjustments must be submitted proactively. Retrospective change requests will be rejected and will result in forfeiture of ODCTE reimbursement.

If project conditions warrant the re-assignment of funds **before** the Agreement is fully approved in CTIMS, refer to [CTIMS EDI Complete User Guidebook](#) to make changes to the Worksheet in CTIMS.

Once an Agreement is fully approved in CTIMS, **only a Budget Adjustment** may be performed. Budget adjustments should only be performed for:

- The release of funds, if it is evident training will not occur or all allocated funds will not be utilized.
- Reallocation of funds for specific training Budget Line Items.

To make a Budget Adjustment to an Agreement in CTIMS: [CTIMS EDI Complete User Guidebook](#).

All worksheet changes or budget adjustments to agreements, made to EDI projects must be fully approved in CTIMS prior to beginning the affected training. Refer to *CTIMS-EDI Approval Process Overview in the Appendix*.

REPORTING ENROLLMENTS

ALL enrollments - regardless of funding eligibility - should be reported following these guidelines.

- Classes and enrollments must have the appropriate Type Code recorded – refer to the WED Type Code criteria in these guidelines.
- **Type 15 (ACD) classes must contain a stated career objective in the course syllabus to be eligible as a Type 15 class.**
- Use **99999** – Business Code for enrollments, when training or consulting is not industry sponsored. See below for reporting non-reimbursable activities.

Classes and enrollments for all classes, trainings and/or seminars conducted, or coordinated, during each quarter are submitted a minimum of once each quarter. **Quarterly reports are due on the 15th after the end of the quarter.**

Training Dates	Enrollments Due By
July 1 – September 30	October 15
October 1 – December 31	January 15
January 1 – March 31	April 15
April 1 – June 30	July 15

*All Data and Corrections are final on **July 15** following end of the fiscal year.*

Online Training

All Online Training must be reported with the appropriate Type Code.

Online Training (OLT) must be a minimum of thirty minutes to be reported. Online training that occurs in less than a half hour increment must be grouped together with similar incremental trainings to arrive at a reporting level that is at least one-half hour. For instance:

- Two, 11-minute safety trainings and one, 8-minute safety training could be grouped into one, ½ hour enrollment
- Five, 12-minute trainings could be grouped into a 1-hour enrollment
- Twelve, 20-minute trainings could be grouped into a 4-hour enrollment.
- Two, 11-minute trainings would not be reported because it is less than one half hour.
- Three, 12-minute trainings could be reported as one training course because it is more than one half hour.

For simplification, these OLT training sessions may be titled and reported in one of the following broad categories which are outlined on the [WED Statewide Programs Guide \(Star Map\)](#)

- Aerospace-OLT
- Agriculture, Food and Natural Resources-OLT
- Architecture and Construction-OLT
- Business Mgmt. and Admin.-OLT
- Entrepreneurship-OLT
- Finance-OLT
- Health Science-OLT
- Hospitality/Tourism-OLT

- Human Services-OLT
- Information Technology-OLT
- Law, Public Safety, Corrections and Security-OLT
- Manufacturing-OLT
- Safety-OLT
- Transportation, Distribution and Logistics-OLT

Refer to the WED Star Map for sub-categories in these headings: [WED Statewide Programs Guide \(Star Map\)](#)

These categories are not to be interpreted to replace reporting for half-hour or longer training sessions with a specified topic. For example, a 4-hour training on “Developing Leadership Skills” should still be listed by that topic with OLT following or a 6-hour “Microsoft Excel” class should be labeled as such with OLT following the title. For example, *Developing Leadership Skills-OLT* or *Microsoft Excel-OLT*.

Virtual Classes

Training conducted in real time by an instructor via an online platform (Zoom, Teams, GoToMeeting, etc.) should be reported with the appropriate type code and with the class title followed by –VC (Virtual Class).

- Webinars and previously recorded virtual classes delivered as online training shall be reported as OLT.
- Classes that are a blend between OLT and in-person training should be recorded where the majority of the training occurred.

For information about WED Data Requirements, including Course, Student Record Layout, go to: [WED Enrollment Technical Guidebook](#)

North American Industry Classification System (NAICS) codes: [NAICS Codes](#)

Reporting Small Business Program Consulting Of Non-Funded Programs

Consulting hours provided by coordinators who are *not* part of a BES/SBM/SET/ABM program are to be reported under **Type Code 60 – Informal Training**. **These hours are non-reimbursable** as they are not training related and will not be included in the Customized and Safety Funding Formula.

Use 99999 – Business Code for enrollments, when training or consulting is not industry sponsored.

Sole Proprietorships

To request a Business Client Code for a Sole Proprietorship – the following information must be provided:

1. Name of Business or Individual
2. Physical Address (cannot be a P.O. Box)
3. Mailing Address
4. NAICS Code

*** NOTE:** Be prepared to provide authentication of doing business: website, social media/e-commerce page or farm tax exemption documentation.

Reporting Non-Reimbursable Activities

Report all personal interest classes as a non-reimbursable type code (60, 61, 62, 75, 78) described on page 23. Below are examples of training activities **not eligible** for reimbursement using any of the WED funding sources:

- Professional development for technology center personnel or boards of education (with the exception of safety training).
- Political or community fund raising activities.
- Religious organization meetings or functions.
- Receptions, meal functions or style shows.
- Commercial exhibits, fairs or promotional activities.
- Open houses or student organization meetings.
- Industry, public school or organizational staff meetings, conventions or team meetings.
- Non-commercial driver education courses, DUI School or driver improvement and defensive driving classes delivered as open enrollment classes.
- Job search, career exploration, employment skills, career development and career search.
- Training conducted for incarcerated people
- Students who are not residents of Oklahoma.
- Driving time.
- Hunter safety, boat safety or concealed weapons training and recreational activities/training.
- Third-party rental of facility use.
- Lab preparation time.

TIP & TIG FOLLOW-UP INTERVIEWS and DATA COLLECTION

In addition to reporting enrollments under the appropriate Type Code in CTIMS, a follow-up interview is to be conducted with each business served through a TIP or TIG funding agreement at the conclusion of the funding agreement. The information collected will be used to demonstrate accountability to the taxpayers of Oklahoma and quality assurance for our system.

All information provided will remain confidential. The information will be aggregated as part of consolidated reporting of all businesses, industries, agencies and organizations receiving WED/BIS services and will not be presented in any company-identifiable manner without the company's consent. A survey will be provided by the Manager of the Workforce and Economic Development (WED) Division.

INVOICING FOR EDI PROJECT FUNDING and GRANT REIMBURSEMENT

(TIP, TIG, Firefighter Initiatives and Safety and Incubator Grants)

Technology centers will follow the invoicing timeline, below. Submit all documents as referenced in the **Invoicing Checklist** (page 12), to receive reimbursement from ODCTE no later than the end of the quarter following the expenditure. **Final quarter requests will not be accepted after July 31 following the end of the fiscal year.**

Payment Processing

- Technology centers are required to submit all documentation as referenced in the **Invoicing Checklist** (page 12).
- ODCTE processes payment requests (invoices) within 20 business days.
- Upon invoice final approval, technology center treasurers receive payment for direct costs as per the approved application.
- **Final quarter requests will not be accepted after July 31 following the end of the fiscal year.**
- Reimbursement for incurred costs included in the approved agreement budget will be processed in CTIMS.
- For invoicing instructions in CTIMS, go to **EDI Invoice Process** at: [CTIMS EDI Complete User Guidebook](#).

Training Dates	Invoicing Due By
July 1 – September 30	December 31
October 1 – December 31	March 31
January 1 – March 31	June 30
April 1 – June 30	July 31

Final quarter requests will not be accepted after July 31st

EDI Project Reimbursement

Items that technology centers may include in funding agreements are:

- Instructor salaries
- Training related equipment
- Curriculum and Curriculum development (*up to 2% of the total TIP training funds, excluding consumables*)
- Instructional supplies/consumables.

See **Invoicing Checklist**, page 12, for reimbursement requirements.

Instructional and Class Rates

Schools are encouraged to use their staff members for training when possible.

- Technology Center Staff
 - Reimbursable up to \$40.00/hr (\$40 includes FICA).
- Company-sponsored Instructors, Adjunct Instructors or Third-Party Contract Trainers:
 - Reimbursable up to \$150*/hr (includes FICA).
- If training is written on a “per class” basis, ODCTE will reimburse amounts above \$150/hour provided appropriate invoice/documentation is attached.

**Specialized training requests over \$150/hour (regardless of unit type) must be pre-approved with the Regional Coordinator and will require appropriate documentation to be uploaded with the agreement and supported in the comments.*

Required documentation for Instructors and Vendors

- If Technology Center Staff rate is \$40/hr or under – attach PEF only.
- If a Company-sponsored Instructor rate is \$40/hr or under – attach PEF only.
- Company-sponsored Instructors, Adjunct Instructors or Third-Party Contract Trainers:
 - Reimbursable up to \$150/hr (includes FICA)
 - **Attach Instructor Contracts and/or Invoices verifying Instructor rate and hours.**
 - Documentation must show Approval Signature.
 - Tie contracts/timesheets to appropriate CTIMS Participant Enrollment Form (PEF).
- **Vendor invoice documentation or Instructor Contracts and timesheets are required for training written as “per class”.**
- Safety training included in a TIG or TIP agreement is NOT to be reported as a Type 21.

Consumable Expenses

ODCTE will only reimburse for consumables (for example: books, curriculum, materials), utilized based on the number of students who complete training. The company or the technology center will bear the burden of consumable expenses for students who do not complete training under an EDI agreement.

TIP Projects Only

- **Company-provided new employee orientation** is reimbursable up to \$100 per new employee.

Training for Industry Credentials

In the event training is being conducted for the purpose of industry certification, Reimbursement may be provided based upon the greater of \$300 per completer or the allowable instructor reimbursement rate for technology center instructor, adjunct instructor, or contract trainer. In order To qualify as training for industry certification, there must be an industry-recognized certification examination associated with student completion.

To qualify as training for industry certification, an industry-recognized certification examination must be associated with student completion. Reimbursement may be provided based upon the greater of \$300 per completer or the allowable instructor reimbursement rate for technology center instructor, adjunct instructor, or contract trainer.

Partial Project Reimbursement Requests

Partial payment requests will be accepted for longer-term projects for which official CTIMS PEFs are not submitted until project completion. These requests for payment can be submitted by attaching a local student accounting system data report. Such SAS data must include information equivalent to a CTIMS PEF. A CTIMS PEF will still be required upon final request for payment on a completed project.

INVOICING CHECKLIST

Technology centers are required to submit all necessary documents to receive reimbursement from ODCTE no later than the end of the quarter following the expenditure. **Final quarter requests will not be accepted after July 31st following the end of the fiscal year.**

Technology Center **WED Directors and Finance Coordinators** are required to review and approve all invoices and documentation in CTIMS prior to submitting invoices to ODCTE. Failure to do so may result in delayed reimbursement.

1. All documentation, including all CTIMS PEFs, instructor documentation and vendor invoices, must be submitted through CTIMS in **one pdf document** - in the same order as the Invoice Line Items.
2. All Invoice Line Items and Documentation must be tied to a corresponding budget line item in the CTIMS Agreement.
3. Reimbursement for third-party or vendor expenditures must include the following on all invoice documentation:
 - a) Invoice number
 - b) Invoice date (Do not use order date, P.O. date, ship date, receive date, or date of first class)
 - c) **Itemized description with amounts**
 - d) **Approval signature**
4. Required documentation for Instructors and Classes:
 - a) If **Technology Center Staff** rate is \$40/hr or under – **attach CTIMS PEF only.**
 - b) If a **Company-sponsored Instructor** rate is \$40/hr or under – **attach CTIMS PEF only.**
 - c) Company-sponsored Instructors, Adjunct Instructors or third-party contract trainers will be reimbursed up to \$150/hour for specialized training with the following documentation:
 - a. **Instructor Contracts and/or Invoices verifying Instructor rate and hours must be attached. Documentation must show Approval Signature.**
 - b. Tie contracts/timesheets to appropriate CTIMS PEF.
 - d) If training is written on a “**per class**” basis in the agreement, ODCTE will reimburse amounts above \$150/hour provided the **vendor invoice or Instructor contracts and timesheets are attached. Documentation must show Approval Signature.**
 - e) All documentation, including all CTIMS PEFs, instructor documentation and vendor invoices, must be submitted through CTIMS in **one pdf document** - in the same order as the Invoice Line Items.

****Note in the “Attachments Box” in CTIMS any abnormalities or special circumstances regarding documentation provided.***

5. A serial number on each piece of equipment exceeding \$500 for IT and \$2,500 for all other equipment is required on invoices for training equipment.
6. When the vendor invoice does not contain sufficient accurate detail to describe what was purchased, additional supporting documentation may be required prior to payment being approved.

WED PROGRAM TYPE CODE CRITERIA

The following considerations should be used when determining eligibility for WED funding and appropriate program type for reporting training services provided. Specific questions regarding funding, guidelines and program type should be directed to the appropriate Regional Coordinator.

Adult and Career Development (ACD) (Type 15)

ACD classes should be occupational in nature and in alignment with local areas of workforce demand. Through ACD classes, adults participate in learning opportunities to up-skill or re-train, develop new and emerging job skills, ease workforce transition, or enhance career advancement. ACD training offers technical skills training, continuing education, professional development, and career advancement learning opportunities to individuals **16 years or older**. They are offered as open enrollment, short-term classes, seminars and occupational preparation classes.

ACD classes must contain a stated career objective in alignment with local workforce demand in course syllabus to be eligible for Type 15.

Report all community interest or personal enrichment classes as a non-reimbursable Type code listed on page 24.

Eligibility Criteria:

- Students must be 16 years or older.
- **Course Syllabus:** Must contain a stated career objective to be eligible for Type 15.
- **Non-Reimbursable Classes:** Personal interest classes should be reported with a non-reimbursable type code (page 24).

Eligible Entities:

- Local City Government
- Local County Government
- Tribal Industries (casinos, stores, hotels, childcare facilities)

Non-Eligible Government Entities:

- State Government
- Federal Government
- Tribal Government
- Education Entity

Special Provisions:

- **CDL Training:** *Effective FY25*, CDL training for A, B, and C classifications can be reported as Type 15 for open-enrollment students.

- **Class Composition:**
 - If less than 50% of students are sponsored by an employer, report the class as Type 15.
 - If 50% or more of the students are employed by eligible employers and the training is job-related, report the class as Type 31. **Change Type codes in CTIMS before uploading enrollment reports if this occurs.**

Reporting:

- All enrollments must be reported through the CTIMS system. Refer to the REPORTING ENROLLMENTS PROCESS on Page 7 or the [WED Enrollment Technical Guidebook](#).

Funding Eligibility:

- **Customized and Safety Training:** Contact hours for employer-sponsored students in ACD classes count towards the Customized & Safety Training formula, provided student enrollments include an industry (NAICS) code.
- **Cross-District Classes:** ACD classes conducted in one technology center district by another technology center are eligible for formula funding with approval from the assigned technology center.

**Central Technology Center *Statewide* Truck Driver Training
(Type 19)**

This program type is used for Central Technology Center’s *Statewide* Truck Driver Training (TDT) program for individuals who complete a Commercial Driver’s License (CDL) in A, B, or C classifications. Clock hours for these classes will not be calculated in the Customized and Safety funding formula nor in the technology center full-time program funding formula.

**Safety for Government Entities or Safety for Industry
(Type 21)**

Safety training is intended to help private or public organizations plan and implement safety processes as well as providing ongoing training to assure safe work environments for Oklahomans. Training that addresses site-specific hazards are to be a priority for any training provided for the client. Class sizes are to be monitored to ensure high quality instruction.

Eligible Entities (*All NAICS codes*)

- Industry
- Local City Government
- Local County Government
- State Government

- Federal Government
- Tribal Government & Tribal Industries
- Education entities

Reporting Enrollments

- **Eligible:**
 - First Aid
 - CPR
 - Training that addresses site-specific hazards.
 - Strategic Safety Plan development.*
 - Online safety courses
- **Non-Eligible:**
 - Train the Trainer
 - Safety courses conducted solely by DVD/video tape

Reporting:

- All enrollments must be reported through the CTIMS system. Refer to the REPORTING ENROLLMENTS PROCESS on Page 7 or the [WED Enrollment Technical Guidebook](#).

Funding Eligibility:

- **Customized and Safety Training:** Contact hours under Type 21 count towards the Customized & Safety Training formula, provided student enrollments include an industry (NAICS) code. Excluding non-industry sponsored students coded as (99999).
- * Funding for strategic safety plan development is available through several EDI and safety initiatives. ODCTE will reimburse up to 40 hours, not to exceed \$2,000, for development of a strategic safety plan.

Skills to Rebuild (Type 22)

This program type is used for specific training done in direct response to a declared emergency by the Governor's office or a direct response to a natural disaster. Specific approval and funding is provided on a case-by-case basis.

Customized Industry Training or Government Entity Training (Type 31)

Customized Industry Training is designed for employees of one or multiple businesses, industries, or public sector organizations. This training qualifies for contact hours under the Customized & Safety Training (CST) Funding Formula. The purpose of this funding is to support, not replace, costs incurred by a technology center in offering these classes.

Funding

- Technology centers delivering Type 31 training will receive funding based on contact hours, as defined by the CST Formula (see Page 2).

- **Eligible Entities**
 - Local City Government
 - Local County Government
 - Tribal Industries (casinos, stores, hotels, and childcare facilities)

- **Non-Eligible Entities**
 - State Government
 - Federal Government
 - Tribal Government
 - Education entities

- **Reporting Enrollments**
 - If 50% or more of the students have an eligible employer NAICS code or a business registered with the Secretary of State on their student record, report the entire class as Type 31.
 - Training must be job-related. Students do not have to be sponsored by the same employer.
 - **Effective FY25, CDL training for A, B, and C classifications may be reported as Type 31 for industry and qualifies for CST funding.**
 - **Material Participation:**
 - The technology center must materially participate in delivering the classes or seminars by accepting enrollments and providing one of the following:
 - Coordination of instructors
 - Marketing
 - Curriculum design
 - All enrollments are to be reported through the CTIMS system. *Go to page 7 - REPORTING ENROLLMENTS PROCESS or [WED Enrollment Technical Guidebook](#).*

**Client-Based Consulting Programs (BES/SBM/SET)
(Type 32)**

**Agri-Business Management (ABM)
(Type 28 and Type 73)**

Type 32 is designated for technology centers with the following approved client-based programs and/or coordinators:

- BES (Business & Entrepreneurial Services)
- SBM (Small Business Management)
- SET (Self-Employment Training)

This program supports client-based consulting services for small business owners and aspiring entrepreneurs. Coordinators partner with these clients to foster successful long-term ventures that enhance local economies. Coordinators develop training classes or seminars for the small business community within their districts.

Funding

- Enrollments submitted under Program Type 32 is excluded from Customized and Safety Training Formula Funding calculations. These programs are included in the equalization formula at a specific position equivalent value.

Agri-Business Management (ABM) – Type 28 and Type 73

Program Type 28 and Type 73 should only be used by technology centers with an approved Agri-Business Management (ABM) client-based program. ABM Coordinators provide one-on-one consulting services and customized business management education for owners of agricultural businesses*.

- **Type 28:** For reporting ABM seminars or training where the ABM Coordinator provides over 50% of the instruction.
- **Type 73:** For reporting ABM client consulting hours.

**Note: Be prepared to provide business or farm tax exemption documentation for verification.*

Reporting Enrollments:

- **All enrollments are to be reported through the CTIMS system.** Go to *REPORTING ENROLLMENTS PROCESS* or [WED Enrollment Technical Guidebook](#).
- Classes, trainings, or seminars should be reported under the appropriate Type Codes based on the criteria they meet:
 - **Type 15 (ACD):**
 - If less than 50% of the students are sponsored by their employer.
 - If the student does not have a business registered with the Secretary of State*.

- **Type 31 (Customized Industry Training):**
 - If the majority (50% or more) of the students have an eligible employer, or students have a business registered with the Secretary of State or are Sole Proprietors, **and**
 - The coordinator did not deliver the majority of the training but had material participation (accepting enrollments, coordinating instructors, marketing the class, and/or designing/providing curriculum).
- **Business Code 99999** – use for enrollments when training or consulting is not employer-sponsored.

***Sole Proprietorships:** To request a Business Client Code** for a Sole Proprietorship, provide:

- Name of Business or Individual
- Physical Address (no P.O. Box)
- Mailing Address
- NAICS Code

****Note:** *Be prepared to provide proof of business, such as a website, social media/e-commerce page, or farm tax exemption documentation.*

**Small Business or Incubator Programs – (non-funded)
(Type 15 or Type 31)**

Small Business or Entrepreneurial Programs focus on local business development, incubator, and management development services. Similar to BES/SBM/SET programs, these programs provide consulting, strategic planning, and training to the entrepreneurial community within their technology center district. Coordinators develop classes or seminars for both small business owners and aspiring entrepreneurs. Classes or seminars may qualify as Type 15 (ACD) or Type 31 (Customized Industry Training) depending on the qualifying enrollment criteria below.

Reporting Enrollments:

- Training activities under these programs should be reported as either Type 15 or Type 31, based on the following criteria:
 - **Type 15 (ACD):**
 - If less than 50% of the students in a class are sponsored by their employer.
 - If the student does not have a business registered with the Secretary of State*.
 - **Type 31 (Customized Industry Training)**
 - If the majority (50% or more) of the students in a class have an eligible employer, or students have a business registered with the Secretary of State, reported on their student record, the entire class should be reported as Type 31. They do not all have to be sponsored by the same employer.
 - **Material Participation:** The technology center must participate in the delivery of the classes or seminars. Material participation is defined as accepting enrollments as well as providing one or more of the following: coordination of instructor(s), marketing of the class, or designing/providing curriculum.

- **Business Code 99999** – use for enrollments when training or consulting is not industry-sponsored.

Reporting Consulting Hours

- These hours are non-reimbursable as they are not training-related and will not be included in the Customized and Safety Funding Formula.
 - **Type 60 (Consulting):** Consulting hours provided by coordinators who are not part of a BES/SBM/SET/ABM program.
 - **Type 68 (Consulting):** All consulting hours conducted with incubator clients.

***Sole Proprietorships:** To request a Business Client Code for a Sole Proprietorship, provide:

- Name of Business or Individual
- Physical Address (no P.O. Box)
- Mailing Address
- NAICS Code

***Note:** Be prepared to provide proof of business, such as a website, social media/e-commerce page, or farm tax exemption documentation.

Training for Industry Growth – (Type 42) (TIG)

The Training for Industry Growth (TIG) Economic Development Initiative (EDI) funds allow technology centers to establish training agreements with multiple members of business and industry who are experiencing common critical skilled workforce shortages within a defined geographic region of the state.

This initiative is intended to assist industry by providing high quality completers in their specific area of need.

- Designed to address only critical immediate workforce shortages.
- Preferably results in nationally recognized certifications, though not required.
- Considered a short-term solution, defined as 3 years or less.
- Aims for program completion to result in job attainment or advancement.

Funding

- TIG funding is based upon the availability of state appropriated funds.
- TIG projects will be considered for approval on a project-by-project basis.
- TIG funding is intended to serve companies who are expanding workforces and export goods and services and/or supply exporters within the following identified ecosystems:
 - Aerospace and Defense
 - Agriculture and Biosciences
 - Energy
 - Health
 - Information and Financial Service
 - Manufacturing
 - Transportation and Distribution

- TIG funds are intended to supplement, not replace, the WED/Business and Industry Services (BIS) budget at the approved technology center.

Eligibility Criteria

- To qualify for TIG funding, technology centers and companies must make the following commitments:

Company Commitments (Qualifications):

- Demonstrate/verify worker shortage.
- Demonstrate active recruitment of workforce required to fill the number of vacancies.
- Make technical experts available to meet with representatives of the technology center and RC to assist with the identification of common skill requirements.
- Provide **Letters of Commitment** to the Tech Center indicating the number of workers they will sponsor for training and/or indicating the number of students they may hire upon completion.
- After course completion, the company may hire the workers it sponsored, if they are still eligible for employment, and will have the option of hiring other program completers who were not sponsored by a specific company.

Technology Center Commitments:

- A Needs Assessment identifying commonalities for all companies will be performed by Technology Center Representative or Coordinator.
- Technology Center Representative or Coordinator and instructor will design the program to meet the standards identified by the Needs Assessment as the minimum skill requirement for current vacant positions.
- Training must be delivered by a technology center staff member or adjunct instructor.
- Technology Center Representative or Coordinator will obtain **Letters of Commitment** from participating companies.
- TC Representative or Coordinator will complete an EDI Training Budget Proposal, using the appropriate fiscal year worksheet, [EDI Worksheet.xlsx](#) and email to appropriate Regional Coordinator for review and approval prior to entering Worksheet in CTIMS.
- **A Purchase Order (P.O.) issued by ODCTE and entered in CTIMS must be in place before training may begin or purchases are made.**

Method for Distributing Funds

- TIG projects will be considered for approval on a project-by-project basis.
- Based on the availability of funds, projects will be funded based on a scoring process utilizing the Return on Investment (ROI) calculator to generate a score.
 - Those proposals with the lowest ROI will have priority in funding.
 - A high ROI score could keep a TIP or TIG project from being eligible for funding.
- **Once funds are designated for a specific TIG project, the following timeline must be followed:**
 - Upon allocation of TIG funds, in CTIMS, to a technology center, an agreement must be initiated in CTIMS, by the Technology Center Representative or Coordinator, within fifteen (15) calendar days.
 - **Training must begin within sixty (60) calendar days of the purchase order being entered into CTIMS. If training does not start within the first sixty days the allocated funds will be removed.**
 - Status of training will be verified by the Regional Coordinator through active invoicing, current CTIMS program enrollment forms (PEFs), or dated sign-in sheets/rosters.

Equipment Purchases

- Equipment purchases up to \$2,400.00 are allowed and will be approved on a project-by-project basis. All equipment purchased will become part of the technology center inventory.

Project Application

- Based on the availability of state appropriated funds, TIG projects will be considered for approval on a project-by-project basis.
- To apply for a TIG project go to the ***EDI and GRANT APPLICATION PROCESS***.

Reporting Enrollments

- All enrollments are to be reported through the CTIMS system. Go to *REPORTING ENROLLMENTS* process or [WED Enrollment Technical Guidebook](#).

Follow-Up Interviews and Data Collection

- A follow-up interview is to be conducted with each business served through a TIG funding agreement at the conclusion of the funding agreement. A survey will be sent to the Technology Center Directors by the Manager of Workforce and Economic Development Division. The information collected will be used to demonstrate accountability to the taxpayers of Oklahoma and quality assurance for our system.
- All information provided will remain confidential. The information will be aggregated as part of consolidated reporting of all businesses, industries, agencies and organizations receiving WED/BIS services and will not be presented in any company-identifiable manner without the company's consent.

Reimbursements

See *INVOICING FOR EDI PROJECT FUNDING REIMBURSEMENT* process.

Training for Industry Credentials

- In order to qualify as training for industry certification, there must be an industry-recognized certification examination associated with student completion.
- In the event training is being conducted for the purpose of industry certification, reimbursement may be provided based upon the greater of \$300 per completer or the allowable instructor reimbursement rate for technology center instructor, adjunct instructor, or contract trainer.

Central Technology Center

Refresher Truck Driver Training – (Type 44)

This program type is used for Central Technology Center Truck Driver Training (TDT) program offered as refresher classes designed for individuals who are not receiving training to become professional truck drivers through the statewide truck driver-training career major offered at Central Technology Center. Examples of these classes would be train-the-trainer or bus driver training. Clock hours for these classes will not be calculated in the Customized and Safety funding formula.

Training for Industry Program (TIP) (Type 52)

TIP grants fund high-quality, customized training for new or expanding companies in Oklahoma, creating net-new jobs. TIP funds allow technology centers to assist Oklahoma companies as they create and grow new jobs by providing high quality customized training at low or no cost to the company. State Regional Coordinators (RC) collaborate with technology centers to develop TIP training agreements.

Company Identification

- Companies may be identified by the Department of Commerce, technology centers, chambers of commerce, and economic development authorities. Companies outside a technology center district will receive training from the most suitable organization.

Eligibility Criteria

- Supports companies that are creating net new jobs in Oklahoma that exports goods or services or companies that supply exporters-in the following identified ecosystems:
 - Aerospace and Defense
 - Agriculture and Biosciences
 - Energy
 - Health
 - Information and Financial Service
 - Manufacturing
 - Transportation and Distribution
- Training is for full-time (30+ hours/week), permanent jobs.
- Companies must offer a comprehensive benefit package with 50% company-paid benefits within 180 days of hire.
- **New hires must occur after the TIP allocation meeting with the appropriate Regional Coordinator.**
- Temporary-to-permanent employees are eligible (proof required).
- WorkKeys assessments.

Non-Eligible Criteria

- On-the-job training (OJT).
- Training involving tangible items/services entering commerce.
- Attrition, turnover, or retention purposes.
- Travel reimbursement.

Re-Eligibility Criteria

- Layoffs (more than one-year-old).
- Downsized Companies –as a result of increased efficiencies and then add new jobs.
- Downsized Companies with No Previous TIP Agreement.

Note: Baseline job count begins at the point company starts its first or new TIP agreement.

TIP Process

- **Technology Center Coordinator Responsibilities**

1. Informs qualifying companies that TIP funds may be available.
2. Provides basic information on TIP guidelines and process.
3. Performs a preliminary training needs assessment.
4. Schedules meeting with company and RC to review eligibility and process.
5. Coordinator will follow the EDI Grant Application process on pages 5 and 6.

- **ODCTE Responsibilities**

1. Discuss the TIP process with TC Coordinator and will review the company's TIP eligibility prior to meeting with company.
2. Attend TIP meeting with company and technology center coordinator or representative.
3. Attend budget planning meeting(s) with the company and TC Coordinator as needed.
4. Review applications, calculate TIP project funding and ROI to determine eligibility.
5. Notify the TC Coordinator if/when the application is approved and funds have been allocated in CTIMS.

Project Application

- TIP projects will be applied for in CTIMS and will be considered for approval on a project-by-project basis*.
- All qualifying projects must be approved by the appropriate ODCTE state staff before training may commence.
- **A P.O. issued by ODCTE and entered in CTIMS must be in place before training may begin or purchases made.**
- To apply for a TIP project, go to *EDI and GRANT APPLICATION*, pages 5 and 6.
- No reimbursable training is to take place before the agreement is approved in CTIMS. *Refer to CTIMS-EDI Approval Process Overview in Appendix.*
- **Project Changes:** All worksheet changes or budget adjustments to agreements, made to EDI projects must be fully approved in CTIMS prior to beginning the affected training. Retrospective change requests will be rejected and will result in forfeiture of ODCTE reimbursement. *See CTIMS EDI Approval Process Overview in Appendix.*
- View the [TIP Process Video](#) for more information on the TIP application process.

Method for Distributing Funds

- TIP projects will be considered for approval on a project-by-project basis.
- Based on the availability of funds, TIP projects will be funded based on a scoring process utilizing the Return on Investment (ROI) calculator to generate a score.
- Those proposals with the lowest ROI will have priority in funding. A high ROI score could keep a TIP or TIG project from being eligible for funding.

Allocation Timeline

- Upon allocation of TIP funds to a technology center, an agreement must be initiated in CTIMS, by the Technology Center Representative or Coordinator, within fifteen (15) calendar days.

- Training must begin within sixty (60) calendar days of the purchase order being entered into CTIMS. If training does not start within the first sixty days the allocated funds will be removed.
- Status of training will be verified by the Regional Coordinator through active invoicing, current CTIMS program enrollment forms (PEFs), or dated sign-in sheets/rosters.

Reporting Enrollments

- Go to *REPORTING ENROLLMENTS* process or [WED Enrollment Technical Guidebook](#).

Reimbursements

- See *INVOICING FOR EDI PROJECT FUNDING REIMBURSEMENT* process.

Training for Industry Credentials

In the event training is being conducted for the purpose of industry certification, reimbursement may be provided based upon the greater of \$300 per completer or the allowable instructor reimbursement rate for technology center instructor, adjunct instructor, or contract trainer. In order to qualify as training for industry certification, there must be an industry-recognized certification examination associated with student completion.

Non-Reimbursed Classes (Type 60, 61, 62, 75, 78)

These program types are used for many classes that are essential to the communities served by the technology center but do not meet the guidelines for state funding.

60 – Informal Training (non-reimbursable): The designation for technical assistance using organizational development tools or processes (needs assessment, surveys). **Includes consulting hours provided by Coordinators of non-funded Small Business or WED/ACD Programs,** phone consultation and preparation time, but it does not include professional development meetings, professional association meetings or marketing-related activities (cold calls, informal visits, public appearances, etc.). This training is not eligible for formula funding.

Technology centers are encouraged to have documentation on file that outlines the objectives, the service or product delivered and the individual(s) responsible for providing the product or service. **Type 60 must be reported with at least one student to indicate for whom the consulting was provided.**

61 – Community Interest/Personal Enrichment (non-reimbursable): The designation for classes conducted and/or coordinated by the technology centers that are typically **not occupational** in nature but meet the needs of the community interest or provide personal enrichment opportunities. Examples are stained glass, soap making, knife making, quilting, and yoga. Classes and activities reported under this program type are **not** eligible for formula funding. **Type 61 can be reported without submitting separate student data.**

62 – Career Development Services (non-reimbursable): The designation for services provided to adults to assist them in achieving career development goals such as career advisement assessments, guidance and counseling services, testing and industry credential certification assessments (Health Certification Project, Office of Personnel Management, information technology certification). **Type 62 can be reported without submitting separate student data.**

75 – Facility Usage Only: The designation used to report classes, meetings or activities conducted at the technology centers in which the only involvement by the technology center is facilitating the usage of the building. (Red Cross blood drives, chamber of commerce meetings, Boy Scout meetings or any classes conducted by outside entities). Classes reported under this program type are not eligible for formula funding. **Type 75 can be reported without submitting separate student data.**

78 – Technology Center Collaboration Partnerships: The designation used to report training that is offered in cooperation with a partnering technology center. This code is **not** eligible for formula funding and **will not** be used in the cost report. **Type 78 must turn in at least one student. The class name must contain the contract number the other technology center is submitting (WORD (A1234)). Type 78 can be reported without submitting separate student data.**

Oklahoma APEX (OkAPEX) Accelerator (*formerly OkPTAC*) (Type 79)

This program type is used for counseling assistance to Oklahoma businesses related to selling products and services to federal, state and local governments.

The primary purpose of OkAPEX is to create jobs and expand the economy in Oklahoma by counseling and coaching businesses, assisting with finding new opportunities, competing successfully on those opportunities and performing successfully on the resulting contracts.

Organization

Participating technology centers deliver OkAPEX services at locations throughout Oklahoma. The Oklahoma Department of Career and Technology Education administers the program. OkAPEX, which serves as a Procurement Technical Assistance Center, is funded in part through a cooperative agreement from the Department of Defense through a program that is administered by the Department of Defense.

Funding And Performance Guidelines For Existing Bid Assistance Centers

1. Minimum performance standards. For existing bid assistance centers to be entitled to full funding, they must meet established minimum performance standards as described in program documents and each technology center’s annual program proposal.
2. Previous performance. Programs are monitored each year in performance to goals and in overall contribution to the statewide program performance.
3. Annual application. Centers participating in the OkAPEX must apply each year. Preference is given to applications submitted by successful existing centers.
 - a. Performance standards; evaluation. Each center submits new goals in its annual application for the next year. Goals and other metrics are described in each year’s

opportunity announcement and in the program general terms and conditions. All program documents can be obtained upon request from the program office at ODCTE.

4. Funding. Funding is based on each year's proposed budget as negotiated with ODCTE and contingent on sufficient federal funds being awarded by DOD.
5. Funding agreement. An approved funding agreement must be executed between each local school and the department each year. **The program year runs August 1, 2023 through March 31, 2024. April 1, 2024-March 31, 2025.**
6. Memorandum of Understanding. Each technology center participating in the OkAPEX must sign a memorandum of understanding which includes by reference the school's proposed application and the program's PTAP General Terms and Conditions issued by the DOD, as well as all applicable federal laws and regulations governing federal grant programs.

OkAPEX Policy and Procedures Manual. The manual spelling out OkAPEX's policies and procedures is maintained at the ODCTE. A copy is given each OkAPEX coordinator at new hire orientation and upon request. A digital copy is available upon request.

Firefighting Training Initiative (FFT) (Type 83)

The Firefighter Training (FFT) Initiative funds allow technology centers to establish more partnerships with members of **volunteer** fire departments. FFT training includes firefighter training and associated testing as well as first responder training and associated testing for firefighters who are members of volunteer fire departments in Oklahoma. Firefighter Training Initiative funds are intended to supplement, not replace, the business and industry services budget at each technology center.

Tuition will not be charged for Firefighter Training (FFT) initiative projects.

Method for Distributing Funds

- Technology centers will be reimbursed on a project-by-project basis for tuition-free training programs designed to meet specific needs of members of volunteer fire departments within their districts.
- Depending upon availability of state appropriated funds, each technology center will have a specific amount of Firefighter Training Initiative funds allocated at the beginning of each fiscal year.

FFT Process

- Technology Center Responsibilities:
 - Inform the volunteer fire departments of the Firefighter Training Initiative funds that are available.
 - Assist members of volunteer fire departments to determine if training could enhance their abilities to serve their community.
 - **Technology Center Coordinator will complete an EDI Training Budget Proposal, using the [EDI Worksheet.xlsx](#) and email to appropriate Regional Coordinator for review and approval prior to entering Worksheet in CTIMS.**

- ODCTE Responsibilities:
 - Approve each eligible application for specific direct costs prior to the project start date.
 - Notify the technology center if/when the application is approved.
 - Process all claims for payment when submitted in CTIMS within 20 business days as per ODCTE Finance division.
 - Upon approval, technology centers will be paid by ODCTE for **direct costs** in accordance with the approved applications.

Eligibility Criteria

- This initiative is intended to serve members of volunteer fire departments in order to enhance knowledge and skills of the members.
- Reimbursement will be available for the following types of Firefighter Training Initiative projects:
 - Basic and upgrade training for members of volunteer fire departments
 - Training in a common skill set for a group of volunteer fire departments

Non-Eligible

- No equipment can be purchased under the FFT initiative.
- **No consumables nor curriculum may be purchased separately from FFT training.**
- No classroom supplies can be purchased under the FF initiative. (Example: pens, pencils, paper, white board markers, erasers etc.)
- Funds cannot be used for indirect costs, building construction, remodeling or leasing of facilities. Technology centers will be encouraged to pool resources for larger projects.

Project Application

- FFT projects will be applied for in CTIMS and will be considered for approval on a project-by-project basis.
- **All Firefighter Training Initiative projects must be fully approved prior to the project start date.** The official start date of the project will be reflected in CTIMS as the date the ODCTE Purchase order (PO) number is entered. No reimbursable training is to take place before the agreement is approved in CTIMS.
 - **Project Changes:** All worksheet changes or budget adjustments to agreements, made to EDI projects must be fully approved in CTIMS prior to beginning the affected training. See CTIMS EDI Approval Process Overview in Appendix. Retrospective change requests will be rejected and will result in forfeiture of ODCTE reimbursement.
- To apply for an FFT training project, go to *EDI and GRANT APPLICATION PROCESS*.

Reporting Enrollments

- Go to *REPORTING ENROLLMENTS* process or [WED Enrollment Technical Guidebook](#).

Reimbursements

- See *INVOICING FOR EDI PROJECT FUNDING REIMBURSEMENT PROCESS*.

Safety Training Grants (Type 90)

The Oklahoma Department of Career and Technology Education (ODCTE) provides funds (if available) to assist in offsetting costs related to purchasing new equipment, upgrading equipment, and instructional libraries and/or instructor training. All qualifying projects must be approved through the WED/BIS Director role. Safety training grants will not exceed \$2,000 for each Technology Center. **Safety training grant funds cannot be used for indirect costs, building construction, remodeling or leasing facilities.**

Application

- Safety training grants will be considered on a project-by-project basis.
- Prior to allocation of funds, written documentation/quote from equipment/product supplier must be provided to the appropriate Regional Coordinator for approval.
- Once the allocation is made in CTIMS, the Technology Center will have 15 business days to create an Agreement in CTIMS.
- Once a P.O. is issued by ODCTE in CTIMS, the Technology Center has 60 calendar days to initiate the purchase or the funding will be eligible for reallocation to other Tech Centers.
- **Purchases may not be made until a Purchase order issued by ODCTE has been entered in CTIMS.**
- **To apply for a Safety Grant, go to *EDI GRANT APPLICATION* for instructions.**

Reimbursements

- Goto *INVOICING FOR EDI PROJECT FUNDING REIMBURSEMENT* process.

Incubator Grants and Incubator Consulting Hours (Type 68)

Incubator Grants may assist Technology Center incubators in offsetting costs related to:

- Purchasing new training-related equipment
- Upgrading training-related equipment
- Client training.

Projects shall be applied for in CTIMS and will be considered for approval on a project-by-project basis. Incubator funds cannot be used for indirect costs, building construction, remodeling or leasing facilities. **A technology center may be eligible for up to \$1,000.00 in incubator funds.**

Application:

- Incubator grants will be considered on a project-by-project basis.
- Requests must meet specific needs for the local incubator and its clients to be eligible.
- All qualifying projects must be pre-approved by the local WED/BIS Director.
- Written documentation or quote from equipment/product supplier must be provided to the appropriate Regional Coordinator for approval.

- Any equipment purchases become property of the technology center.
- **Purchases may not be made until a Purchase order issued by ODCTE has been entered in CTIMS.**
- Application is made in CTIMS, go to *EDI and GRANT APPLICATION* page for instructions.

Incubator Consulting Hours

- All consulting hours conducted with incubator clients are to be reported as **Type 68**.
- Classes or seminars, offered through a technology center incubator, may qualify as either Type 15 (ACD - open enrollment) training or a Type 31 (Customized Industry Training) depending upon qualifying enrollment criteria. Go to *REPORTING ENROLLMENTS* for eligibility criteria.

Appendix

Complete and submit EDI Budget Proposal [EDI Worksheet.xlsx](#) to appropriate Regional Coordinator.

CTIMS EDI Approval Process Overview

Worksheet Approval Stage (Stage 1)

EDI Role	Process
1. Local Coordinator	Initiate the Worksheet Approval process. Budget is added here along with company information. Upload the Excel spreadsheet, as well as supporting documents (i.e. 3 rd party vendor proposal).
2. State Regional Coordinator	Approve the budget and line items and confirm company information is entered completely.
3. State Initiative Supervisor	Approve the budget and line items. The Worksheet becomes fully approved.

Change Request Worksheet Approval Stage (if changes to worksheet necessary)

EDI Role	Process
1. Local Coordinator	Initiate the Change Request process if changes to budget line descriptions, units, unit types or vendor/provider information needs to be changed.
2. State Regional Coordinator	Approve the budget and line items.
3. State Initiative Supervisor	Approve the budget and line items. The changes are approved. The Worksheet becomes fully approved.

Agreement Approval Stage (Stage 2)

EDI Role	Process
1. Local Coordinator	Initiate the Agreement approval process. (No changes should need to be made.)
2. Local WED/BIS Director	Approve the Agreement
3. State Regional Coordinator	Approve the Agreement. The approval will generate a signature on the SOU.
4. State Initiative Supervisor	Approve the Agreement. The approval will generate a signature on the SOU.
5. Local Superintendent/CEO (or designee)	Approve the Agreement. The approval will generate a signature on the SOU.
6. State Requisition Coordinator	Generate the SOU, submit the requisition to finance, enter the PO number into the Agreement.
7. Local Finance Coordinator	Enter OCAS codes and add new codes as needed. The Agreement becomes fully approved.

Budget Adjustment Approval Stage (if Agreement changes are necessary)

EDI Role	Process
1. Local Coordinator	Initiate the Budget Adjustment process. Budget is adjusted and/or new line items added here.
2. Local WED/BIS Director	Approve the Budget Adjustment.
3. State Regional Coordinator	Approve the Budget Adjustment.
4. State Initiative Supervisor	Approve the Budget Adjustment.
5. Local Superintendent/CEO (or designee)	Approve the Budget Adjustment.
6. State Requisition Coordinator	Verify the PO amount is still accurate. (if \$ increased, then request finance increase the PO amount)
7. Local Finance Coordinator	Verify OCAS codes and add new codes as needed. The Budget Adjustment becomes fully approved.

Invoice Approval Stage (Stage 3)

EDI Role	Process
1. Local Coordinator	After training is complete, the EDI Local Coordinator initiates the invoice process.
2. Local WED/BIS Director	Review and approve invoice line items and attachments.
3. Local Finance Coordinator	Review and approve invoice line items and attachments.
4. State Regional Coordinator	Review and approve invoice line items and attachments.
5. State Requisition Coordinator	Verify the invoices, print the documentation, and deliver to the finance department.
6. ODCTE EDI Finance Reviewer	Review and approve the invoice and documentation. The invoice is fully approved. Pay the claim.

Summary of Revisions

Changes Made Effective August 6, 2024

Acronyms and Definitions Added

CDL – Commercial Driver’s License

CTIMS PEF – CareerTech Information Management System Program Enrollment Form

Page 2: Customized And Safety Training (CST) Formula Funding And Payments

- **Non - Eligible:**
 - *Effective FY25 Type 01 (Apprenticeship) hours will no longer be eligible for CST Formula Funding.*
 - *Students coded as open enrollment (99999) with no employer NAICS code.*

Page 13: Type 15 revised description:

ACD classes should be occupational in nature and in alignment with local areas of workforce demand. Through ACD classes, adults participate in learning opportunities to up-skill or re-train, develop new and emerging job skills, ease workforce transition, or enhance career advancement. ACD training offers technical skills training, continuing education, professional development, and career advancement learning opportunities to individuals **16 years or older**. They are offered as open enrollment, short-term classes, seminars and occupational preparation classes.

ACD classes must contain a stated career objective in alignment with local workforce demand in course syllabus to be eligible for Type 15.

Report all community interest or personal enrichment classes as a non-reimbursable Type code listed on page 24.

Added to Type 15:

- Commercial Driver’s License (CDL) training for A, B, and C classifications may be reported as Type 15 for open-enrollment students. (*effective FY25*)

Page 16: Added to Type 31:

- Commercial Driver’s License (CDL) training for A, B, and C classifications may be reported as Type 31 for industry and qualifies for contact hours under the Customized & Safety Training (CST) Funding Formula. (*effective FY25*)

Page 14: *New Type Code* - Central Technology Center *Statewide* Truck Driver Training – Type Code 19

This program type is used for Central Technology Center’s Statewide Truck Driver Training (TDT) program for individuals who complete a Commercial Driver’s License (CDL) in A, B, or C classifications. Clock hours for these classes will not be calculated in the Customized and Safety funding formula nor in the technology center full-time program funding formula.

Page 21: *New Description* – Central Technology Center *Refresher* Truck Driver Training - Type Code 44

This program type is used for Central Technology Center Truck Driver Training (TDT) program offered as refresher classes designed for individuals who are not receiving training to become professional truck drivers through the statewide truck driver-training career major offered at Central Technology Center. Examples of these classes would be train-the-trainer or bus driver training. Clock hours for these classes will not be calculated in the Customized and Safety funding formula.

Page 24: Non-Reimbursed Classes - Type 61 Revised Description

61 – Community Interest/Personal Enrichment (non-reimbursable): The designation for classes conducted and/or coordinated by the technology centers that are typically not occupational in nature but meet the needs of the community interest or provide personal enrichment opportunities. Examples are stained glass, soap making, knife making, quilting, and yoga. Classes and activities reported under this program type are *not* eligible for formula funding. **Type 61 can be reported without submitting separate student data.**

Changes Made Effective July 1, 2023

1. Replaced “OkPTAC” references with “OkAPEX” and updated OkPTAC Contacts to include new OkAPEX links:
 - a. [OkAPEX Accelerator](#)
 - b. okapex@careertech.ok.gov
 - c. [OkAPEX Coordinators](#)
2. Updated all CTIMS EDI reference links, below:
 - a. [WED Guidelines](#)
 - b. [EDI Worksheet.xlsx](#)
 - c. [CTIMS EDI Complete User Guidebook](#)
 - d. [CTIMS EDI Training Video](#)
 - e. [TIP Process Video](#)
 - f. [OCAS Codes for WED](#)
 - g. [WED Enrollment Technical Guidebook](#)
 - h. [WED Staff Contacts](#)
 - i. [WED Statewide Programs Guide \(Star Map\)](#)
 - j. [Business Master Technical Guidebook](#)
 - k. [North American Industry Classification System \(NAICS Codes\)](#)

3. Page 5 and CTIMS/IMD Contacts and Resources page - added link to **CTIMS EDI Training Video** on CareerTech YouTube channel.
4. Page 10, "Invoicing for EDI Project Funding Reimbursement" the highlighted items:
Instructional and Class Rates
 Schools are encouraged to use their staff members for training when possible.
 - Technology Center Staff
 - Reimbursable up to \$40.00/hr (\$40 includes FICA).
 - Company-sponsored Instructors, Adjunct Instructors or Third-Party Contract Trainers:
 - Reimbursable up to \$150/hr (includes FICA)
 - Specialized training requests over \$150/hour (regardless of unit type) must be pre-approved with the Regional Coordinator and will require appropriate documentation to be uploaded with the agreement and supported in the comments.
 - Class
 - If training is written on a "per class" basis, ODCTE will reimburse amounts above \$150/hour provided appropriate invoice/documentation is attached.
 - **Safety training included in a TIG or TIP agreement is NOT to be reported as Type 21.**
5. Page 11,"Invoicing for EDI Project Funding Reimbursement" under "Required Documentation for Instructors and Vendors" added:
"Vendor invoice documentation or Instructor Contracts and timesheets are required for training written as "per class".
6. Page 12, 'Invoicing Checklist', added under #4 b):
 - b) If a **Company-sponsored Instructor** rate is \$40/hr *or under* – **attach PEF only.**
 - d) If training is written on a "**per class**" basis in the agreement, ODCTE will reimburse amounts above \$150/hour provided the **vendor invoice or Instructor contracts and timesheets are attached.**
Documentation must show Approval Signature.
7. Pages 16, 17 & 27, Client-Based Consulting Programs – (Type 32) (BES/SBM/SET) Agri-Business Management – (Type 28 and Type 73) - Under Sole Proprietorships*, Added -
*** *NOTE: Be prepared to provide authentication of doing business: website, social media/e-commerce page or farm tax exemption documentation.***

Changes Made Effective July 1, 2022

1. Removed from front title page: "Business and Industry Services". Guidelines now titled "Workforce and Economic Development" or "WED" Guidelines
2. Updated Contacts Pages to reflect new personnel for Regional Coordinators and CTIMS/IMD as well as new hyperlinks for CTIMS and EDI related webpages/sites.
3. Pages 8 and 17 - Added under Reporting Enrollments (page 8) and Small Business Programs (page 17), the following:
 - a. **Reporting Small Business Program Consulting of Non-Funded Programs (other than BES/SBM/SET funded Programs)**
 - b. Consulting hours provided by coordinators who are **not** part of a BES/SBM/SET/ABM program are to be reported under **Type Code 60 – Informal Training. These hours are non-reimbursable as they are not training related and will not be included in the Customized and Safety Funding Formula.**
 - c. **SOLE PROPRIETORSHIPS**
 - d. To request a Business Client Code for a Sole Proprietorship – the following information must be provided:
 - i. Name of Business or Individual
 - ii. Physical Address (cannot be a P.O. Box)
 - iii. Mailing Address
 - iv. NAICS Code

4. **NOTE:** *Be prepared to provide authentication of doing business: website, social media/e-commerce page*
 - a. ****Use 99999** – Business Code for enrollments, when training or consulting is not industry sponsored.
 5. Page 12 - Invoicing Checklist - added following:
 - a. All documentation, including all PEFs, must be submitted through CTIMS in **one pdf document - in the same order as the Invoice Line Items.**
 6. Required documentation for Instructors:
 - a. If a Company-sponsored Instructor rate is \$40/hr or under – attach PEF only.
 7. Page 13 – Apprenticeship (Type 01) – removed: The apprenticeships may be registered or unregistered. Schools can receive funding for providing Related Technical Instruction (RTI) in support of the apprenticeship.
 8. Removed “Travel” from Invoicing Checklist (page 12) – travel reimbursement will no longer be eligible under TIP.
 9. Page 14 - Type 21 - Added CPR and 1st Aid as “eligible training”
 10. Page 16 - Client-Based Consulting Programs -added Sole Proprietorship information in #3, above.
 11. Page 22 - added link to TIP Training Video: [TIP Process Video](#)
 12. Page 23 – Non-Reimbursed Classes (Type 60) – added, “Includes consulting hours provided by Coordinators of non-funded Small Business or WED (BIS)/ACD Programs”.
 13. Page 27 - added Sole Proprietorships information in #3, above.
 14. Removed all references to MIS Codes as these will no longer be required.
 15. Removed “Changes Made Effective July 19, 2019” pages.
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