



OJT CUSTOMER INTEREST / REFERRAL FORM

WIOA Case Manager Must Sign this Referral Form Prior to Customer Meeting with OJT PROGRAM Staff

Note to Staff: All OJT Announcements will be provided to the WIOA Title 1 Adult, Dislocated Worker and Youth Service Provider staff as soon as OJT opportunities become available. For questions, please contact our OJT PROGRAM staff at BSR-Team@co.monterey.ca.us.

WIOA CASE MANAGER RESPONSIBILITIES:

- Ensure that customer’s experience and skill level match the requirements in the OJT Announcement. Customers **must** have the knowledge, skills and abilities that an OJT Employer is requesting for the position.
- Provide customer with an initial career advising session.
- Develop an IEP with the customer. The Training Plan will be developed as part of the IEP.
- Ensure that customer has completed a WorkKeys assessment at a level 3 or higher.
- Provide comprehensive case notes in CalJOBS justifying the OJT for the customer.
- Ensure that the customer resides in Monterey County WDB’s Service Delivery Area
- Forward by email the following documentation for review and approval by OJT PROGRAM staff:
 - ❖ OJT Referral Form;
 - ❖ Customer resume (to show relevance to the OJT position);
 - ❖ WorkKeys Certificate; and
 - ❖ OJT Announcement.

WIOA Case Manager **must** sign this referral form.

CUSTOMER OJT APPROVAL PROCESS:

OJT PROGRAM staff will make an appointment with the customer for initial qualifications review and interview.

Please note:

- Completing the requirements listed above will not guarantee approval for OJT.
- Each request will be reviewed and evaluated on a case-by-case basis.
- If approved, follow-up appointments will be scheduled to review and discuss the OJT Plan.

CUSTOMER NAME (PRINT): _____

CUSTOMER SIGNATURE: _____ DATE: _____

STATE ID # _____

CAREER ADVISOR NAME (PRINT): _____

CAREER ADVISOR SIGNATURE: _____ DATE: _____