



WORKFORCE and ECONOMIC DEVELOPMENT GUIDELINES

Effective Date: July 1, 2025 – June 30, 2026
Revision Date: November 25, 2025



**OKLAHOMA
CareerTech**

WED

Workforce and Economic Development

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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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CRITICAL DATES AND DEADLINES

Enrollments

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*

Invoicing

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*

EDI Timelines

EDI Application in CTIMS

- Allow **10 business days** for full approval of application in CTIMS.
- Initiate and submit EDI Worksheet within **15 business days** of allocation of funds in CTIMS.

Training Start Timeline and Verification

- Training must **begin within 60 calendar days** of the PO being entered into CTIMS.
- Failure to start training within this timeframe will result in removal of allocated funds.

WORKFORCE and ECONOMIC DEVELOPMENT (WED) PROGRAMS

[Workforce and Economic Development Apprenticeship Training \(WED-AT\)](#)

[Adult and Career Development \(ACD\)](#)

[Agri-Business Management \(ABM\)](#)

[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 Training](#)

[Skills to Rebuild](#)

[Small Business or Incubator](#)

ECONOMIC DEVELOPMENT INITIATIVES (EDI)

[Incubator Grants](#)

[Firefighter Training \(FFT\)](#)

[Oklahoma APEX \(OkAPEX\) Accelerator](#)

[Safety Training Grants](#)

[Training for Industry Growth \(TIG\)](#)

[Training for Industry Program \(TIP\)](#)

ACRONYMS and DEFINITIONS

ABM	Agri-Business Management
ACD	Adult and Career Development
BES	Business and Entrepreneurial Services
BIS	Business and Industry Services
CDL	Commercial Driver's License
CST	Customized and Safety Training
CT-A	CareerTech Apprenticeship
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
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
RAP	(USDOL) Registered Apprenticeship

RR	Rapid Response
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
WC	Workforce & Economic Development (WED) Coordinator
WED-AT	Workforce & Economic Development Apprenticeship Training

Business Code 99999 – Use for enrollments when training or consulting is not employer nor industry sponsored.

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 ($20 \times 4 = 80$). An 8-hour class taught over 4 days for 20 students would equal $((8 \times 4) \times 20 = 640$ 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.

GENERAL INFORMATION and FUNDING

Workforce and Economic 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:

- Customized and Safety Training (CST) Formula
- Economic Development Initiatives (EDI)
- Specific Program Funding
- Grants

The WED division of ODCTE administers these funds, with oversight from ODCTE administration. For questions regarding funding or processes, contact the appropriate [WED Coordinator](#).

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 at ODCTE.
- 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
- Rapid Response
- Safety Grants
- Safety Training (All [NAICS Codes](#))

- Tribal Business Entities
- Volunteer Firefighter Training
- Workforce Development (TIP and TIG)

For specific guidelines on funding eligibility, refer to the [Program Type](#) section.

Allowable Expenses

- Instructor salaries
- Company trainer salaries
- Approved 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

Go to [Non-Reimbursable Training Activities](#) section for more information.

CUSTOMIZED and SAFETY TRAINING (CST) FORMULA FUNDING and PAYMENTS

Annual Allocation

At the start of each fiscal year, and based on available funds, ODCTE allocates 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 these revenue codes:

- Type 21: Project code 448, Revenue code 3848
- Type 31: Project code 433, Revenue code 3833

CST Formula Data Submission and Calculation

- Tech centers submit student enrollments to ODCTE through the **CareerTech Information Management System** (CTIMS).
- Information Management Division (IMD) reviews all enrollment data.
- Classes hosted in another Technology Center's district must be approved by that district's tech center.
- CST Formula Funding is calculated based on a three-year average of eligible contact hours, new and repeat businesses served and technology center valuation tiers. For more information, contact your ODCTE [WED Coordinator](#).
 - New Businesses and Repeat Businesses:
 - New businesses to technology center served or businesses not served in two years.

CST Class Composition:

- Material Participation Required for all CST Eligible Program Type Codes:

To claim a class, technology centers must take enrollment and provide one of the following:

- Coordinate Instructors
- Marketing
- Curriculum

CST Eligible Program Type Codes:

- **Type 15 - ACD Training**
 - **Eligibility:**
 - Individual enrollments must include a **Type 31** eligible NAICS code (see below).
 - Must have a stated career objective in syllabus.
 - Students must be 16 years or older.
 - **Class Reclassification (Type 15 to Type 31):**
 - See the **Reclassification of Type 15 Classes to Type 31** section in the Reporting Enrollments section.
- **Type 19 - Central Technology Center Statewide Truck Driver Training (Class A, B, C) CDL Training**
 - **CST funding eligible** for courses meeting **Type 31** criteria as defined in these guidelines with eligible **NAICS Codes** for entities listed above.
 - Students must complete a **minimum of 16 hours**.
- **Type 21 - Safety Training**
 - All **NAICS Codes** eligible
- **Type 31 - Customized Industry Training**

Includes courses meeting **Type 31** criteria as defined in these guidelines with eligible North American Industry Classification System Codes (**NAICS Codes**) for the following entities:

 - Private Industry/Business

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

Non-eligible for CST Funding Formula

- **Business Code:**

Business Code: 99999 – use for enrollments when training or consulting is not employer nor industry-sponsored.

Non-eligible Programs:

- **Type 01: Apprenticeships** (effective FY25)
- **[Type 32](#): Client-Based Consulting** (BES/SBM/SET Programs)
- **[Type 60](#): Client Consulting/Needs Assessment** by non-funded programs/coordinators.
- **[Type 61](#): Community Interest/Personal Enrichment**: Classes that are typically not occupational in nature with no career objective. Type 61 can be reported without submitting separate student data.
- **[Type 62](#): Career Development Services**: The designation for services provided to adults such as career advisement assessments, guidance and counseling services, testing and industry credential certification assessments.
- **[Type 73](#): Agri-Business Management (ABM) Client Consulting**
- **[Type 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. Type 75 can be reported without submitting separate student data.
- **[Type 78](#): Technology Center Collaboration Partnerships**: The designation used to report training that is offered in cooperation with a partnering technology center. Type 78 can be reported without submitting separate student data.
- **[Type 79](#): OkAPEX Accelerator**

Non-reimbursable Activities:

- Professional development for tech center staff/boards (unless safety-related)
- Political, community fundraising, religious functions
- Receptions, meal functions, style shows
- Fairs, promotional exhibits, open houses
- Staff meetings, conventions, organizational team events
- Non-commercial driving courses (e.g., DUI school)
- Job search/career exploration training
- Incarcerated or out-of-state student training
- Driving time, recreational safety courses
- Lab prep time, facility rentals

EDI and GRANT FUNDING APPLICATION PROCESS

Overview:

Funding Types:

- [Incubator Grants](#)
 - Five grants at \$2,500 each
 - One per Technology Center
- [Safety Grants](#)
 - \$2,500 per Technology Center
- [Training for Industry Growth \(TIG\)](#)
- [Training for Industry Program \(TIP\)](#)
- [Volunteer Firefighter Training \(FFT\)](#)

Pre-Project Considerations

- Must be reviewed by the Technology Center in collaboration with WED Division.
- Must be approved by ODCTE State Staff (WED Coordinator and State Initiative Supervisor).
- Projects are evaluated case-by-case, based on fund availability.
- TIG/TIP use ROI scores to prioritize funding:
 - Lower ROI = Higher priority
- **Allow 10 business days** (once the application is started) for full approval of application in CTIMS.

Pre-Application Requirements

1. Verify Eligibility & Identify Funding Type
 - Review EDI and grant descriptions to confirm project eligibility.
 - Consult your [WED Coordinator](#) (WC) to verify eligibility.
2. ODCTE Purchase Order Requirements:
 - Training **cannot begin and purchases are not reimbursable** until the EDI State

Requisition Coordinator enters the ODCTE PO in CTIMS.

- Refer to [CTIMS-EDI Approval Process Overview](#) in the Appendix.
- TC EDI Local Coordinator will receive a CTIMS-generated email once PO is entered.

EDI Training Budget Proposal – Fund Allocation Steps

1. Create an EDI Training Budget Proposal using the [EDI Worksheet.xlsx](#):

- Include direct costs (e.g., instructor salary, training equipment, instructional supplies).
- Curriculum development may be included (max 2% of TIP funds, excluding consumables).
- Exclude indirect costs, building construction/remodeling, or facility leasing.

2. Submit [EDI Training Budget Proposal](#) to [WED Coordinator](#) with required documentation for Budget Line Items including the following:

- **TIG:** Letters of Commitment from two or more participating companies.
 - Use the **TIG Letters of Commitment** templates provided by your WED Coordinator.
- **Safety, Incubator, FFT:** Vendor proposals, screen shots of webpage, or quotes.
- **TIP:** Follow [TIP Process Video](#) guidelines or consult your [WED Coordinator](#).

3. Proposal Approval and Allocation:

- WED Coordinator reviews the [EDI Training Budget Proposal](#).
- Once approved, the State Initiative Supervisor allocates funds in CTIMS.
 - **Note:** The technology center must issue a local PO for the full allocation amount **before** submitting an Agreement in CTIMS.

4. EDI Application in CTIMS:

- Allow **10 business days** for full approval of application in CTIMS.
- Within 15 business days of allocation, initiate and submit EDI Worksheet.
- Follow the [CTIMS EDI Complete User Guidebook](#) for instructions.

- Include the completed [EDI Training Budget Proposal](#) and required documentation (see above).
 - Refer to [CTIMS-EDI Approval Process Overview](#) in the Appendix or [CTIMS EDI Training Video](#) for more information on the EDI application process in CTIMS or consult your [WED Coordinator](#).
- **Training Start Timeline and Verification:**
 - Training must begin within 60 calendar days of the PO being entered into CTIMS.
 - Failure to start training within this timeframe will result in removal of allocated funds.
 - WED Coordinator verifies training using:
 - Active invoicing
 - Program Enrollment Forms (PEFs) or class rosters
 - Dated sign-in sheets or rosters
- **Project Modifications and Adjustments**
 - WED Coordinator must approve modifications or adjustments prior to submitting changes in CTIMS.
 - Once an Agreement is fully approved, only **Budget Adjustments** are permitted.
 - **Adjustments allowed for:**
 1. Releasing unused funds
 2. Reallocating funds between approved budget line items
 - Follow the [CTIMS EDI Complete User Guidebook](#) for instructions.
 - **Prior to training beginning**, State Requisition Coordinator must approve all modifications or adjustments.
 - Retrospective changes are not allowed and will void reimbursement.

REPORTING ENROLLMENTS

General Requirements

- All enrollments must be reported in CTIMS, regardless of funding eligibility.
- Use the correct [WED Type Code](#) criteria as defined in these guidelines.
- Submit quarterly reports by the 15th **after** each quarter ends.
- **Student hours:** (effective FY26)
 - Must be at least 50% of course hours (exempt: Types 02, 03, 15, 19).
 - Must not exceed course hours (exempt: Types 02, 03).
 - [Type 19 Central Technology Center Statewide Truck Driver Training](#):
 - Participants must complete a minimum of 16 hours of training to count as an enrollment.

Fiscal Year Reporting:

- Split classes crossing fiscal years.
 - Report FY25 portions with end date of June 30, 2025.
 - Report FY26 portions with start date of July 1, 2025.
- **Final data/corrections deadline**: July 15 after the fiscal year ends.

Type Code Use and Class Composition

Select Type Code hyperlink for full description and eligibility requirements.

- [Type 2](#): USDOL Registered Apprenticeships (RAP)
- [Type 3](#): Oklahoma CareerTech Apprenticeships (CTA)
- [Type 15](#): Adult and Career Development (ACD):

Must meet the following criteria:

- Must have a stated career objective in syllabus.
- Students must be 16 years or older.
- **Material Participation Required:**

To claim a class, technology centers must take enrollment **and** provide one of the following:

- Coordinate Instructors
 - Marketing
 - Curriculum
- Use when less than 50% of students are employer or industry sponsored.
- If 50% or more of students are employer or industry sponsored by [Type 31 eligible NAICS codes](#), the class may be reclassified as Type 31. See [Reclassification Process](#).
- **BES/SBM/SET, ABM or Incubator Programs:**
 - Classes or seminars developed by technology center coordinators for small business owners, agri-business owners, aspiring entrepreneurs and Incubator clients will be reported as either a **Type 15** or **Type 31** depending on enrollments.
- [Type 19 Central Technology Center Statewide Truck Driver Training](#) (TDT) Program

This program type is used for individuals who complete a Commercial Driver's License (CDL) in A, B or C classifications through Central Technology Center's TDT program. Clock hours for these classes will not be calculated in the CST funding formula nor in the technology center fulltime program funding formula.

 - To be entered as an enrollment, participants must complete a minimum of 16 hours of training. (Beginning FY26)
 - Material participation not required.

Technology Centers using Central Technology Center's Statewide TDT program to provide **TDT as a vendor in its district** should follow the reporting rules below:

- Report as [Type 31](#) for employer or industry-sponsored enrollments matching.

[Type 31 eligible NAICS codes.](#)

- Report as [Type 15](#) for open-enrollment students.

- [Type 21: Safety](#)

All [NAICS Codes](#) apply.

- **TIG or TIP**

Safety training provided in TIG or TIP agreements is **not to be reported** as Type 21. It is to be reported under the appropriate [Type Code 42 \(TIG\)](#) or [Type Code 52 \(TIP\)](#).

- [Type 22: Skills to Rebuild](#)

Specific training done in direct response to a declared emergency by the Governor's office or a direct response to a natural disaster.

- [Type 31: Customized Industry Training](#)

Must meet the following criteria:

- 50% or more of students are employer or industry sponsored by [eligible NAICS codes](#) for the following entities:

- Private Industry/Business
 - Local City Government
 - Local County Government
 - Tribal Industries (casinos, stores, hotels, and childcare facilities)

- Training is job-related or industry specific.
 - Applies even if not all students are from the same employer.
 - May apply to [Small business and Incubator \(non-funded\) Programs.](#)
 - **Material Participation Required:**

- To claim a class, technology centers must take enrollment **and** provide one of the following:
 - Coordinate Instructors
 - Marketing

- Curriculum
- [**Type 32: Client-Based Consulting \(BES/SBM/SET Programs\)**](#)
Use when coordinators of these programs provide one-on-one consulting.
- [**Type 42: Training for Industry Growth \(TIG\)**](#)
Use for 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.
- [**Type 44: Central Technology Center Refresher Truck Driver Training**](#)
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.
- [**Type 52: Training for Industry Program \(TIP\)**](#)
TIP grants fund high-quality, customized training for new or expanding companies creating net-new jobs in Oklahoma.
- [**Type 60: Client Consulting/Needs Assessment**](#)
Use when consulting services, needs assessments, technical assistance, etc. are provided by technology center coordinators of WED Programs.
- [**Type 61: Community Interest/Personal Enrichment**](#)
Classes that are typically not occupational in nature with no career objective. Type 61 can be reported without submitting separate student data.
- [**Type 62: Career Development Services**](#)
The designation for services provided to adults such as career advisement assessments,

guidance and counseling services, testing and industry credential certification assessments.

- **Type 68: Incubator Client Consulting**

All consulting hours conducted with incubator clients.

- **Type 73: ABM Client Consulting**

All consulting hours conducted by ABM Coordinator.

- **Type 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. Type 75 can be reported without submitting separate student data.

- **Type 78: Technology Center Collaboration Partnerships**

The designation used to report training that is offered in cooperation with a partnering technology center. Type 78 can be reported without submitting separate student data.

- **Type 79: OkAPEX Accelerator**

Use for counseling assistance to Oklahoma businesses related to selling products and services to federal, state, and local governments.

- **Type 83 Firefighting Training Initiative (FFT)**

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.

Online Training (OLT)

- Must be more than or equal to 30 minutes to report.
- Combine short sessions (e.g., 3×12 mins = 36 mins = 1 course).
- Label as “[Topic]–OLT” or by broad category (e.g., “Manufacturing–OLT”).
- Do not replace specific course titles with categories for longer trainings (e.g., "Developing Leadership Skills–OLT").
- Use for reporting webinars/recorded sessions.

Virtual Classes (VC)

- Real-time virtual classes (Zoom, Teams, etc.): Add “–VC” to course title.
- For hybrid classes, classify based on majority of delivery method.

Reclassification of Type 15 Classes as Type 31 (Added FY26)

1. Verify Student Employment:

- Determine if at least 50% of the students in the **Type 15** class are employed by eligible [Type 31](#) employers. (Refer to the eligibility criteria for Type 31 employers).

2. Confirm Training Relevance:

- Verify that the training being provided is job-related for enrolled students.

3. Evaluate Eligibility for Reclassification:

- If **both** conditions above are met, change the class Type Code from 15 to 31 in the technology center enrollment system.

4. Submit Enrollment Reports:

- Upload the enrollment reports only after the class has been reclassified.

Business Codes

- **Business Code 99999:**
 - Use for enrollments when training or consulting is not employer nor industry-sponsored.
- **Requesting Business Codes:**
 - Refer to the [CTIMS Business Master Guidebook](#) and provide the following:
 1. Business or individual name
 2. [NAICS Codes](#)
 3. FEI/DUNS numbers (if applicable)
 4. Physical & mailing address (no P.O. Boxes)
 - **Sole Proprietors**
 - Must also provide **one** of the following:
 - E-commerce site/social platform
 - Tax exemption number
 - Social Security number (if no EIN)

INVOICING FOR EDI PROJECT FUNDING AND GRANT REIMBURSEMENT

Submission Deadlines

- Technology centers must submit all required documentation no later than the end of the quarter following the expenditure.
- Final quarter invoices will **not be accepted after July 31** following the end of the fiscal year.

<u>Training Dates</u>	<u>Invoice Due By</u>
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)

Payment Processing

- ODCTE processes invoices within 20 business days of submission.
- Payments are made directly to the technology center treasurer for approved expenses.
- Invoices must be submitted through CTIMS using the [CTIMS EDI Complete User Guidebook](#).

Pre-Submission Requirements

- WED Directors and Finance Coordinators must review and approve all invoice documentation in CTIMS. See [CTIMS Process Overview](#).
- Failure to complete internal review before submission of invoice in CTIMS may result in delayed reimbursement.
- A **CTIMS** (generated) **Participant Enrollment Form (PEF)** must be attached to CTIMS Invoice for all trainings related to reimbursement requests.

Reimbursable Items of Approved EDI Agreements

- Instructor salaries
- Approved training-related equipment
- Curriculum and curriculum development
 - Curriculum development is reimbursable up to 2% of TIP funds excluding consumables.
- Instructional supplies
- Consumables
 - Books
 - Needs assessments
 - Testing
 - Training materials

Instructional Salary Rates & Documentation Requirements

1. Technology Center Staff

- **Rate:** Up to **\$40/hour** (FICA included)

Required Documentation:

- CTIMS-generated **Participant Enrollment Form (PEF)**

2. Adjunct Instructors or Company Sponsored Instructors

- **Rate:** Up to **\$40/hour** (FICA included)

Required Documentation:

- CTIMS-generated **Participant Enrollment Form (PEF)**

- **Rate for specialized instruction: \$41/hour – \$150/hour** (FICA included)

Required Documentation:

- CTIMS-generated **Participant Enrollment Form (PEF)**
- **Instructor contract** and **timesheets** (showing rate and hours)
 - Signed by TC Coordinator or Director

- **Rate over \$150/hour:**

- May be approved for specialized or company-sponsored training
- Must be pre-approved by the **WED Coordinator**
- Must be justified with supporting documentation
- Rate and justification must be noted in agreement comments

Required Documentation:

- CTIMS-generated **Participant Enrollment Form (PEF)**
- **Instructor contract** and **timesheets** (showing rate and hours)
 - Signed by TC Coordinator or Director

3. Vendor / OSU-Fire Services Training Invoices:

Required Documentation:

- CTIMS-generated PEF
- **Invoice:**
 - Must be signed by TC Coordinator or Director

4. Consumable Reimbursement

- ODCTE will reimburse consumables **only for students who complete training**.
The technology center or company bears costs for non-completers.

Required Documentation:

- CTIMS-generated PEF
- Vendor invoices/receipts with approval signature of TC Coordinator or Director.

Equipment Purchase Requirements

- Invoices for equipment must include a serial number if:
 - IT equipment cost exceeds **\$500**
 - All other equipment cost exceeds **\$2,500**
 - These items will be placed on ODCTE State Asset Inventory and audited annually.

- If invoice lacks item detail, submit additional documentation as requested.

TIP Projects – New Hire Orientation

- **\$100 per new employee** reimbursement for company-provided new hire orientation.

Industry Credential Training

- Training leading to industry-recognized certifications qualifies for reimbursement as follows:
 - The greater of \$300 per completer or the standard instructor reimbursement rate (staff, adjunct, or contractor).
 - Certification exam must be associated with course completion.

Partial Reimbursement Requests

- For longer-term projects without submitted CTIMS PEFs:
 - Submit interim invoices using Student Accounting System (**SAS**) data equivalent to a CTIMS generated PEF.
 - A final **CTIMS PEF** is still required with the final payment request.

INVOICE SUBMISSION PROCESS

1. Collect Documentation

- Include CTIMS PEFs.
- Required documentation as stated in [Invoicing for EDI Project Funding and Grant Reimbursement](#) for type of reimbursement.
- Arrange documents in the **same order as the invoice line items** in CTIMS.

2. Create a Single PDF File

- Combine all documents into one PDF.

3. Verify Budget Alignment

- Ensure each invoice line item corresponds to a **specific budget line** in the approved CTIMS Agreement.
- If invoice descriptions are incomplete, attach additional documentation showing purchase details.

4. Attach Supporting Documentation

- Upload through CTIMS all documentation aligned with budget lines for which you are invoicing. Refer to [CTIMS EDI Complete User Guidebook](#).
- Document any special situations or issues in the **CTIMS Attachments Box**.

5. Submit and Track Status

- Submit invoice through CTIMS. Refer to [CTIMS EDI Complete User Guidebook](#).
- Track payment through CTIMS (go to [CTIMS Invoicing Approval Process](#)) and respond to any feedback or requests for clarification promptly.

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 [WED Coordinator](#).

Type 02 and 03 - Workforce and Economic Development Apprenticeship Training (WED-AT)

These program type codes document a technology center's support and facilitation of apprenticeships within an Oklahoma company. Apprenticeships may be a US-DOL Registered Apprenticeship (RAP-Type 02) or an Oklahoma CareerTech Apprenticeship (CTA-Type 03). Apprenticeships should be industry driven and developed in collaboration with employer partners designed to provide a tailored workforce solution for upskilling new or incumbent employees to meet specific needs. Apprenticeship Types 02 and 03 are eligible for WED-AT Formula Funding. [Funding Tiers](#) are available on our website. For questions, refer to [WED Apprenticeship Contacts](#).

Apprenticeships should consist of the following:

- Paid Job – apprentices are paid (W-2) employees of the company (1099 contract not eligible)
- On-the-Job Learning (OJL) – Apprenticeships provide structured, on-the-job learning with targeted learning objectives outlined in either the RAP or CTA Agreement.
- Related Instruction (RI) – apprenticeships include guided learning that can be delivered in-person, virtually, hybrid delivery, or asynchronously.
- Mentorships – apprentices should be assigned an at-work mentor to guide the at-work learning.
- Credentials: align with and support attainment of industry recognized credentials or certifications.

Technology Centers should document skill development and learning in both RI & OJL throughout an apprenticeship by developing processes for documentation and evaluation tailored to local needs.

Type 02 – US-DOL Registered Apprenticeships (RAP)

Require a minimum of 144 hours of RI.

- RAPs must be registered and certified with US-DOL Office of Apprenticeship prior to beginning training. [ODCTE apprenticeship team](#) will assist in this process.
- A Technology Center or the Employer can serve as the Sponsor of a RAP.
 - If the Employer is the RAP Sponsor, the Technology Center may report RI provided in support of the RAP. It is recommended that a RAP be written for each company.

- If the Technology Center is the RAP Sponsor, the following documentation is required:
- Participant Information: Includes the Apprentice, Employer/Sponsor & Mentor.
 - Selection processes & signature pages.
 - Work Schedule, RI Plan, wage info & signatures.
 - Appendix D: *If part of consortium.

Type 03 - Oklahoma CareerTech Apprenticeships (CTA)

Require a minimum of 600 total hours, or above, consisting of 15% RI and 85% On-the-job Learning (OJL).

- A completed [CareerTech Apprenticeship Agreement](#) must be maintained and submitted to ODCTE prior to beginning a CTA.
 - Includes Start/Dates
 - RI to be provided by the Technology Center
 - OJL Schedule & Targeted Learning Objectives
 - Apprentice, Employer & Technology Center Signatures
- Once the apprenticeship has been complete
 - Mark the apprentices as complete in CTIMS
 - [Request a CTA certificate](#)
 - ODCTE will then issue a CTA Certificate
 - ODCTE will send the student a digital badge

Student Eligibility

- Adult & Secondary students 16 years old or above are eligible.
 - Full-time Technology Center program students may be transitioned from a Full-Time Program & enrolled into a WED Apprenticeship.
 - Student becomes a course concentrator.
 - RI for the apprenticeship should be new, additional training aligned to Employer specific needs.
 - Dual Enrollment: A Full-Time student can be enrolled in a Tech Center Program and a

WED Apprenticeship only if:

- RI for the apprenticeship is above and beyond the coursework in the Full-Time program and is completed outside of and addition to the Full-Time program hours.
- Prior Full-Time program hours do not qualify for WED-AT Reimbursement.
 - Advanced standing from prior learning may be granted towards completion of an apprenticeship, in certain cases as approved by ODCTE.

Financial Aid Information and Guidelines

The timing of a student's withdrawal in relation to the next payment period is a critical factor in determining **federal student** aid repayment obligations, and possibly the student's continued eligibility for additional aid later. To ensure compliance with federal regulations and proper aid distribution, schools must work closely with their local financial aid officer when determining program packaging and payment schedules. **The IDEAL time for a funded student to leave a fulltime program is near the end of a payment period – and before they start the next payment period.**

- Determining the End of the Payment Period
 - The end of a payment period varies depending on how the school structures a student's program. Payment periods are often ½ of a 1-year fulltime program. Longer programs will have 3 – 4 payment periods.
- Factors that influence the payment period include:
 - Total program hours
 - The Pell academic year for that program, (often — but not always — 900 hrs.)

Because each institution may package programs differently, confirming payment period dates with the financial aid office is essential before processing any withdrawals or payments.

- Impact of Withdrawal on Pell Funding

Students who complete 60.1% or more of their payment period generally should not be required to repay Pell Grant funds. However, depending on the timing and packaging of aid, the school may be responsible for repaying a portion of the disbursed funds.

This underscores the importance of maintaining open communication with local financial aid officer to:

- Accurately track student progress and completion rates
- Ensure correct calculations for return of funds (if applicable)
- Avoid institutional repayment liabilities

To protect both the student and the institution, all program withdrawals and payment schedules must be reviewed and coordinated with the school's financial aid office before finalizing any action.

While there are always preferred timelines, financial aid processes exist to deal with withdrawals whenever they happen.

WED-AT Related Instruction Reimbursement Eligibility & Requirements

- Up to a maximum of 144 hours of RI per student, per year, provided by the technology center are eligible for reimbursement using the WED-AT funding formula.
 - ***RI hours beyond 144 should still be reported using the appropriate apprenticeship Type Code: 02 or 03.***
- The training may be delivered in person, virtually, or in combination as long as the technology center is facilitating, monitoring and documenting student learning.
- Technology Center must have material participation in facilitating or supporting apprenticeship RI to claim WED-AT funds.
- Apprenticeship RI training must be reported in CTIMS.
 - See [WED Apprenticeship Reporting Guidebook](#) for details.
- Reimbursement is dispersed quarterly, in arrears.
- Only RI hours completed during the apprenticeship are eligible for WED-AT reimbursement.
 - Prior training hours do not qualify (even if the Employer or a 3rd credentialing entity grant credit or advanced standing).
 - Note: Lunch breaks should not be included in the reported OJL or RTI numbers.
- RI in a WED Apprenticeship should be new, additional training aligned to Employer needs.

Apprenticeship Follow-Up Reporting Requirements

Technology Centers accepting WED-AT funding agree to providing follow-up data in CTIMS 6 – 12

months after the completion of the apprenticeship, documenting outcomes.

Completion and Certificate Generation

The Technology Center will indicate in CTIMS the apprenticeship is completed and ODCTE will issue an official Oklahoma CareerTech Apprenticeship Certificate of Completion.

For more information or questions, refer to [WED Apprenticeship Contacts](#)

Type 15 - Adult and Career Development (ACD)

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. They are offered as open enrollment, short-term classes, seminars, and occupational preparation classes.

Must meet the following criteria:

- Must have a stated career objective in syllabus.
- Students must be 16 years or older.
- Use when less than 50% of students are employer or industry sponsored.
- If 50% or more of students are employer or industry sponsored by [Type 31 eligible NAICS codes](#), the class may be reclassified as Type 31. See [Reclassification Process](#).
- Refer to **Reporting Enrollments** for Type 15 qualification requirements.
- Central Technology Center [Statewide](#) Truck Driver Training (TDT)
 - Effective FY25, CDL training for A, B, and C classifications provided by [Central Technology Center Statewide Truck Driver Training](#) can be reported as Type 15 for open-enrollment students **regardless** of material participation.
 - Participants must complete a minimum of 16 hours of training to count as an enrollment.

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

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 eligible [Type 31](#) 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.

Non-reimbursable

- **Community interest/Personal Enrichment** classes that are typically not occupational in nature with no career objective should be reported as [Type 61](#).

Type 19 - Central Technology Center Statewide Truck Driver Training

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.

- To be entered as an enrollment, participants must complete a minimum of 16 hours of training.
- Central Technology Center's Statewide TDT program **as a vendor to a technology center**:
 - Report as [Type 31](#) for employer or industry-sponsored enrollments matching [Type 31 eligible NAICS codes](#).
 - Report as [Type 15](#) for open-enrollment students.
 - Material participation is not required.

Type 21 - Safety Training

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 / Private Business
- Local City Government
- Local County Government
- State Government
- Federal Government
- Tribal Government & Tribal Industries
- Education entities

Training

- **Eligible**
 - First Aid
 - CPR
 - Training that addresses site-specific hazards
 - Strategic Safety Plan Development (see below)
 - Online safety courses
- **Non-Eligible**
 - Train-the-trainer
 - Safety courses conducted solely by DVD/video tape

CST Funding Eligibility

- **Customized and Safety Training:** Contact hours under Type 21 count towards the Customized & Safety Training formula, provided student enrollments include a [NAICS Code](#). Excluding non-industry sponsored students coded as [Business Code 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.

Type 22 - Skills to Rebuild

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.

Type 31 - Customized Industry Training or Government Training

Customized Industry Training is designed for employees of one or more businesses, industries, or public-sector organizations. Training is tailored to meet specific workforce needs and supports skill development directly tied to workplace performance.

This training qualifies for **contact hour funding under the Customized & Safety Training (CST) Formula**, helping offset—but not replace—the cost to technology centers for providing instruction.

Eligible Entities

- Private Industry and Business
- Local City Government
- Local County Government
- Tribal Industries (e.g., casinos, hotels, stores, childcare facilities)
- [Type 19 Central Technology Center Statewide Truck Driver Training \(TDT\) Program](#)

Non-Eligible Entities

- State Government
- Federal Government
- Tribal Government
- Education Entities (e.g., schools, colleges)

Small Business (including BES/SBM/SET), Agri-Business (ABM) or Incubator Classes:

- Refer to **Reporting Enrollments** for Type 31 qualification requirements.

Type 32 - Small Business and Entrepreneurial Programs (BES/SBM/SET)

Effective FY26, BES/SBM/SET programs are **no longer included in the equalization formula** at a specific position equivalent value.

Small Business and Entrepreneurial Programs focus on local business and management development services. These programs provide consulting, strategic planning, and training to the entrepreneurial community within their technology center district. Technology Center coordinators develop classes or seminars for small business owners, agri-business owners and aspiring entrepreneurs.

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 32: Client-Based Consulting under BES/SBM/SET Programs**
 - Use to report consulting services provided through one of these programs.

Reporting Classes

Classes or seminars developed by technology center coordinators for small business owner and aspiring entrepreneurs will be reported as either a Type 15 or Type 31 depending on enrollments. Go to [Reporting Enrollments](#) for student enrollment requirements.

Type 42 - Training for Industry Growth (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.

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

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 Technology Center indicating the number of workers they will sponsor for training and/or indicating their willingness to interview students who complete the training as well as 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 provide and obtain **Letters of Commitment** from participating companies utilizing templates obtained by ODCTE [WED Coordinator](#).
- Technology center representative or coordinator will complete an [EDI Training Budget Proposal](#), using the appropriate fiscal year worksheet, [EDI Worksheet.xlsx](#) and email to appropriate [WED 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.**

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](#).

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 WED 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.

Reporting Enrollments

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

Reimbursements

See [Invoicing for EDI Project Funding Reimbursement](#) process section.

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.

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.

Type 44 - Central Technology Center Refresher Truck Driver Training

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.

Type 52 - Training for Industry Program (TIP)

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 WED Coordinators (WC) collaborate with technology centers to develop TIP training agreements. View the [TIP Process Video](#) for more information on the TIP application process or contact your [WED Coordinator](#).

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 new net jobs in Oklahoma that exports goods or services or companies that supply exporters in the following identified ecosystems:

Ecosystems

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

Criteria

- 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 WED Coordinator.
- **Upskills training for employees moving to new positions as a result of company expansion, new product line or new equipment.(Effective FY26)**
- Temporary-to-permanent employees are eligible (proof required).
- WorkKeys assessments.
- Based on the availability of state appropriations.

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-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.

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.

Technology Center Representative (Coordinator) Responsibilities

- Informs qualifying companies that TIP funds may be available.
- Provides basic information on TIP guidelines and process.
- Performs a preliminary training needs assessment.
- Schedules meeting with company and WED Coordinator to review eligibility and process.
- Upon WC's approval, TC Coordinator will follow the [EDI and Grant Application Process](#).

ODCTE Responsibilities

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

Pre-Application

- TIP projects will be applied for in CTIMS and will be considered for approval on a project-by-project basis*.
- Baseline job count begins at the point company starts its first TIP agreement or new TIP agreement.
- 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.
- No reimbursable training is to take place before the agreement is approved in CTIMS. Refer to CTIMS-EDI Approval Process Overview in [Appendix](#).

Application and Allocation of Funds

- To apply for a TIP project, go to [EDI and Grant Application Process](#) section.

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](#).

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.

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

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 – Client Consulting and Needs Assessments (non-reimbursable): The designation for technical assistance using organizational development tools or processes (needs assessment, surveys). Includes consulting hours provided by coordinators of WED 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.

Type 68 - Incubator Grants and Incubator Consulting Hours

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

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

Incubator funds cannot be used for indirect costs, building construction, remodeling, or leasing facilities.

Funding Availability

- Five grants in the amount of \$2,500 each.
- One grant per Technology Center that applies.

Application

- Incubator grants will be considered on a project-by-project basis - first come/first serve.
- 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 and [WED Coordinator](#) from ODCTE.
- Application is made in CTIMS, go to the [EDI and Grant Application Process](#) section 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 \(ACD\)](#) training or a [Type 31 \(Customized Industry Training\)](#) depending upon qualifying enrollment criteria. Go to the [Reporting Enrollments](#) for eligibility criteria.

Type 73 - Agri-Business Management (ABM)

Effective FY26, ABM programs are **no longer included in the equalization formula** at a specific position equivalent value.

Agri-Business Programs focus on local business and management development services. These programs provide consulting, strategic planning, and training to the entrepreneurial community within their technology center district. Technology Center coordinators develop classes or seminars for small business owners, agri-business owners and aspiring entrepreneurs.

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 73: Agri-Business Management (ABM):**
 - Use to report consulting services or customized business management education provided through an approved Agricultural Business Management (ABM) program.

Reporting Classes

Classes or seminars developed by technology center coordinators for agri-business owners will be reported as either a **Type 15** or **Type 31** depending on enrollments. Go to [Reporting Enrollments](#) for student enrollment requirements.

Type 79 - Oklahoma APEX (OkAPEX) Accelerator

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

- 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.
- Previous performance. Programs are monitored each year in performance to goals and in overall contribution to the statewide program performance.
- Annual application. Centers participating in the OkAPEX must apply each year. Preference is given to applications submitted by successful existing centers.
 - 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.
- Funding – Funding is based on each year's proposed budget as negotiated with ODCTE and

contingent on sufficient federal funds being awarded by DOD.

- Funding agreement – An approved funding agreement must be executed between each local school and the department each year. **The program year runs April 1, 2025 - March 31, 2026.**
- 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.

Type 83 - Firefighting Training Initiative (FFT)

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.

Allowable Expenses

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

Non-Eligible

- No permanent 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.

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 [WED 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.

Project Application in CTIMS

- 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.

- To apply for an FFT training project, go to [EDI and Grant Application Process](#).

Type 90 - Safety Training Grants

The Oklahoma Department of Career and Technology Education (ODCTE) provides safety training grant funds (if available) to assist in offsetting costs related to:

- Purchasing New Equipment
- Upgrading Equipment
- Instructional Libraries
- Instructor Training

All qualifying projects must be approved through the WED/BIS Director role and ODCTE [WED Coordinator](#). 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.
- To apply for a Safety Grant, go to [EDI and Grant Application Process](#).

APPENDIX

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 WED 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, unit types or vendor/provider information needs to be changed.
2. State WED 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 WED 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 WED 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 WED 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 November 25, 2025

1. Customized and Safety Funding Formula:

a. Added:

CST Class Eligibility:

- Material Participation Required for All CST Eligible Program Type Codes:

To claim a class, technology centers must take enrollment and provide one of the following:

- a. Coordinate Instructors
- b. Marketing
- c. Curriculum

2. **Reporting Enrollments:**

- a. Added Material Participation requirements under Type 15 (to match Type 31).
- b. Removed: Refer to [Small business and Incubator \(non-funded\) Programs](#) for Type 15 qualification requirements.
- c. Added under **Type 15 ACD**:

BES/SBM/SET, ABM or Incubator Programs:

Classes or seminars developed by technology center coordinators for small business owners, agri-business owners, aspiring entrepreneurs and Incubator clients will be reported as either a **Type 15** or **Type 31** depending on enrollments.

3. Added under **Invoicing for EDI Project Funding and Grant Reimbursement**:

- a. A **CTIMS** (generated) **Participant Enrollment Form (PEF)** must be attached to CTIMS Invoice for all trainings related to reimbursement requests.

4. WED PROGRAM TYPE CODE CRITERIA

a. Added under **Types 15 and 31**:

Small Business (including BES/SBM/SET), Agri-Business (ABM) or Incubator Classes:

- Refer to [Reporting Enrollments](#) for qualification requirements.

5. Removed verbiage regarding funding of BES/SBM/SET under **Type 32 – Client Based Consulting**

Programs.

- a. Replaced with: ***“Effective FY26, BES/SBM/SET and ABM programs are no longer included in the equalization formula at a specific position equivalent value.”***
 - b. Added: **Reporting Classes**
Classes or seminars developed by technology center coordinators for small business owners and aspiring entrepreneurs will be reported as either a Type 15 or Type 31 depending on enrollments. Go to [Reporting Enrollments](#) for student enrollment requirements.
6. Removed verbiage regarding funding of ABM programs under **Type 28 and Type 73 Agri Business Management (ABM)**.
- a. Replaced with: ***“Effective FY26, BES/SBM/SET and ABM programs are no longer included in the equalization formula at a specific position equivalent value.”***
 - b. Added: **Reporting Classes**
Classes or seminars developed by technology center coordinators agri-business owners will be reported as either a Type 15 or Type 31 depending on enrollments. Go to [Reporting Enrollments](#) for student enrollment requirements.
7. Removed [Small business and Incubator \(non-funded\) Programs](#) section/page.

Changes made effective July 8, 2025

1. Enter document reformatted to ADA Requirements.
2. **Added to TIP - Upskills training for employees moving** to new positions as a result of company expansion, new product line or new equipment.(Effective FY26).
3. **Business Code 99999 (redefined)** – Use for enrollments when training or consulting is not employer nor industry sponsored.
4. **Critical Dates and Deadlines** page added.

Changes made effective April 30, 2024

Page 14 –Reporting Enrollments – added:

- Student hours must reach at least 50% of the course hours. (Program types 02, 03, 15, & 19

are exempt)

- Student hours cannot exceed course hours. (Program types 02 & 03 are exempt)

Changes made effective April 24, 2024

Page 25 – Central Technology Center Statewide Truck Driver Training Type 19 – added:

- To be entered as an enrollment, participants must complete a minimum of 16 hours of training.

Changes made effective November 18, 2024

Pages 6 & 7 - Acronyms and Definitions – added:

- **Sole Proprietorship** – criteria for requesting a CTIMS Business Code and reporting enrollments:
 1. Name of Business **or** Individual
 2. Physical Address **and** Mailing Address (*cannot be P.O. Box only*)
 3. NAICS Code
 4. Authentication of doing business. Provide one of the following:
 - e-commerce website or social media e-commerce account/site (*fb marketplace; etsy/eBay seller, etc*)
 - farm or sales tax exemption number
 - Social Security Number of Individual

5. Page 9 & 10 - CUSTOMIZED and SAFETY TRAINING (CST) FORMULA FUNDING and PAYMENTS

Added:

- CDL Training Provided by Central Technology Center Statewide Truck Driver Training
- *Effective FY25*, CDL training for A, B, and C classifications provided by Central Technology Center Statewide Truck Driver Training (*page 25*) may be reported as Type 31 for industry enrollments and qualifies for CST funding, *regardless* of material participation.
- *Effective FY25*, CDL training for A, B, and C classifications provided by Central Technology Center Statewide Truck Driver Training (*page 25*) may be reported as Type 15 for open-enrollment students *regardless* of material participation.
 - If 50% or more of the students in a class have an *eligible* employer NAICS code and

the class is job-related, then report the entire class as Type 31. Change Type codes in CTIMS before uploading enrollment reports if this occurs.

6. Pages 14-15 - Reporting Enrollments Pages 23-25 - Type 15 (ACD)

Pages 27-28 - Type 31 (Customized Training or Local Government Entity Training)

Pages 29-31– Client-Based Consulting (BES/SET/SBM), ABM, Small Business & Incubator (non-funded programs)

Reporting Enrollments (revised to include the following)

- Classes, trainings, or seminars should be reported under the appropriate Type Codes based on the criteria they meet.
- All enrollments are to be reported through the CTIMS system. Go to REPORTING ENROLLMENTS PROCESS or the WED Enrollment Technical Guidebook .
 - Class Composition
 - Type 15 (ACD):
 - If less than 50% of the students in a class are sponsored by their employer. Type 15 (ACD) classes must contain a stated career objective in the course syllabus to be eligible.
 - If 50% or more of the students in a class have an *eligible* employer NAICS code and the class is job-related, then report the entire class as Type 31. Students do not all have to be sponsored by the same employer.
 - Type 31 (Customized Industry Training):
 - If 50% or more of the students in a class have an *eligible* employer NAICS code and the class is job-related, then report the entire class as Type 31. Students do not all have to be sponsored by the same employer.
 - 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

- CDL Training Provided by Central Technology Center Statewide Truck Driver Training
 - *Effective FY25*, CDL training for A, B, and C classifications provided by Central Technology Center Statewide Truck Driver Training (*page 17*) may be reported as Type 31 for industry enrollments and qualifies for CST funding, *regardless* of material participation.
 - *Effective FY25*, CDL training for A, B, and C classifications provided by Central Technology Center Statewide Truck Driver Training (*page 17*) may be reported as Type 15 for open-enrollment students *regardless* of material participation.
 - If 50% or more of the students in a class have an *eligible* employer NAICS code and the class is job- related, then report the entire class as Type 31. Change Type codes in CTIMS before uploading enrollment reports if this occurs.
- Business Code 99999 – use for enrollments when training or consulting is not industry-sponsored.

To **Request a Business Code** for employers not found in the Business Master in CTIMS, refer to the CTIMS Business Master Guidebook

The following information must be provided to request a Business Code:

1. Name of Business or Individual
2. NAICS Code (Primary)
3. FEI Number and DUNS Number, if applicable.
4. Physical Address and Mailing Address (*cannot be P.O. Box only*)

Sole Proprietorship – criteria for requesting a CTIMS Business Code and reporting enrollments:

1. Name of Business or Individual
2. Physical Address and Mailing Address (*cannot be P.O. Box only*)
3. NAICS Code
4. Authentication of doing business. Provide one of the following:
 - e-commerce website or social media e-commerce account/site (*fb marketplace; etsy/eBay seller, etc*)
 - farm or sales tax exemption number

- Social Security Number of Individual

Page 23 - Adult Career Development (ACD) – Type 15

- Class Composition
 - Type 15 (ACD):
 - If less than 50% of the students in a class are sponsored by their employer.
 - ACD classes must contain a stated career objective in alignment with local workforce demand in course syllabus to be eligible for Type 15.
 - Type 31 (Customized Industry Training):
 - If 50% or more of the students in a class have an *eligible* employer NAICS code and the class is job-related, then report the entire class as Type 31.
 - Students do not all have to be sponsored by the same employer.
- *Added: verbiage on Requesting a Business Code and Sole Proprietorship Requirements for a Business Code*

7. Pages 29-31– Client-Based Consulting (BES/SET/SBM), ABM, Small Business & Incubator (non-funded programs)

Added: verbiage on Requesting a Business Code and Sole Proprietorship Requirements for a Business Code

8. Page 33 - Training for Industry Growth (TIG) (added red/highlighted verbiage)

Company Commitments (Qualifications):

- Provide Letters of Commitment to the Tech Center indicating the number of workers they will sponsor for training and/or indicating their willingness to interview students who complete the training as well as the number of students they may hire upon completion.

Changes Made Effective October 10, 2024

1. Contacts – WED and WED Coordinators – updated to reflect only WED Coordinators
2. Added – Work-Based Learning and Apprenticeship Contacts

3. CTIMS/IMD Contacts – moved and updated

4. Page 2 - Customized And Safety Training (CST) Formula Funding And Payments

• CDL Training Provided by Central Technology Center *Statewide Truck Driver Training*

- *Effective FY25*, CDL training for A, B, and C classifications provided by Central Technology Center Statewide Truck Driver Training (*page 17*) may be reported as Type 31 for industry enrollments and qualifies for CST funding, *regardless* of material participation.
 - 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.
- *Effective FY25*, CDL training for A, B, and C classifications provided by Central Technology Center Statewide Truck Driver Training (*page 17*) may be reported as Type 15 for open-enrollment students *regardless* of material participation.
 - 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 and the class is job related, report the entire class as Type 31. Change Type codes in CTIMS before uploading enrollment reports if this occurs.

5. Page 7 – Reporting Enrollments

*Effective FY25, class enrollments must be reported in the fiscal year for which classes took place.

Classes that extend across fiscal years must be reported in the following manner:

1. Report FY25 classes and enrollments with ending date of June 30, 2025.
2. Report the remaining classes and enrollments with beginning date of July 1, 2025 and FY26 ending date.

5. Page 13 – *Added* Workforce and Economic Development Apprenticeship (Types 02 and 03)

6. Page 15 – Adult Career Development (Type 15) ACD

CDL Training Provided by Central Technology Center *Statewide Truck Driver Training*

Effective FY25, CDL training for A, B, and C classifications provided by Central Technology Center Statewide Truck Driver Training (*page 17*) may be reported as Type 15 for open-enrollment

students *regardless* of material participation.

- 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 and the class is job related, report the entire class as Type 31. Change Type codes in CTIMS before uploading enrollment reports if this occurs.

7. Page 18 - Customized Industry Training or Local Government Entity Training (Type 31)

CDL Training Provided by Central Technology Center Statewide Truck Driver Training

Effective FY25, CDL training for A, B, and C classifications provided by Central Technology Center Statewide Truck Driver Training (*page 17*) may be reported as Type 31 for industry enrollments and qualifies for CST funding, *regardless* of material participation (as defined below).

- 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.

8. Pages 22, 25, 30 - Added to TIG, TIP and FFT Type Code Criteria

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

9. Page 29, #5 - Correction –Oklahoma APEX (OkAPEX) Accelerator

7. Funding agreement. An approved funding agreement must be executed between each local school and the department each year. The program year runs April 1, 2024-March 31, 2025.