

## Process Documentation for Customized Training

- All required documentation must be submitted, due diligence completed and contract signed **prior to the start date of training.**
- You may sign up for the training, but the intake packages must be submitted and contract signed prior to the first day of training.

### Step 1: We Need to Do Our Due Diligence

If your business has never worked with CSSWFNY before we need to complete a due diligence process prior to contract development.

Complete Vetting Paperwork (**1- Standard Grant Pre-Award Survey and Agreement, 1.1 NYS DOL – Responsibility Questionnaire**) and email as quickly as possible to Business Services representative: It usually requires 2-3 business days on the states end to be “found responsible”.

**While waiting for the due diligence process:**

### Step 2: Tell Us Why You Need Help

**Provide Summary Needs Request** (basically a cover letter for why these particular employees require this training- see template) Include the elements of our discussion in which the desire to “retain current employment” and “develop skills to support future growth” are important variables in your desire to increase the incumbent workers’ skill set.

**The Training Impact must fall within one of the following categories:**

- Introduction of new technology
- Introduction to new production or services procedures
- Upgrading to new jobs that require additional skills
- Workplace Literacy
- Appropriate purpose identified by the Local Workforce Dev. Board

### Step 3: Tell Us How You Want to Accomplish Your Goal

Provide training information; Training Provider, Type of training, brief description of curriculum/skills increase, dates of training, hours of training, cost of training per participant. **(Invoice from training provider is helpful for this step)**

### Step 4: Tell Us Who You Want to Train

Have each eligible person complete a “**IEP 04.27.20**” and “**ES102 Sup. Quest**”. Provide a **copy of driver’s license.**

**Eligibility:**

- Must earn less than \$35.00/hour
- If male born after Dec 31, 1959 registered with selective service
- Registered in the OSOS data base. (If an individual has collected unemployment or utilized our One Stop Career Centers at some point in their history, they are more than likely registered)
- If not, we can have the potential trainee fill out a redacted registration form and enter their information into the Department of Labor OSOS system to make them eligible participants.

### Step 5: We Will Generate the Agreement

Return all intake packages for a contract to be generated. Contract will be delivered for original signatures **Prior to the start of training.**

### Step 6: Tell Us How It Went

Upon completion, CSSWFNY will require:

**Invoice from the training provider**

**Copy of Payment to Training Provider**

**Completion Certificates for all eligible trainees**

### Step 7: We Will Send You a Check

A check for reimbursement as per the contract will be distributed when all the elements required are provided.

***If you need any additional information, please feel free to call or email.  
I look forward to helping you with your training needs!***