

Oregon Apprenticeship Tracking System (OATS)

Step-by-Step Guide

Version 1.0

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About this Guide

Who Should Read This Guide?

The Oregon Apprenticeship Tracking System (OATS) provides program sponsors a set of easy tools to manage the recordkeeping requirements of apprentices' training and instructional activities. **This guide is for the program administrators, coordinators, and administrative support staff** that are responsible for documenting the administration of registered apprenticeship and pre-apprenticeship training programs. These programs are sponsored under the authority of the Oregon State Apprenticeship and Training Council (OSATC), in coordination with the Oregon Bureau of Labor and Industries (BOLI).

Once BOLI staff has done the necessary setup for an authorized program in OATS, *program reporters* can use this guide to steer them through the steps necessary to record information such as apprentice status changes, hours accrued and other apprenticeship activities.

Feedback & Support

The OATS application is designed to make the administration of a registered apprenticeship program as easy as possible. To make that a reality, your feedback is greatly appreciated and will help us improve the system.

Please contact the Apprenticeship and Training Division at atdemail@boli.state.or.us for assistance with accessing or using the system, and with your suggestions for improvements to both the application and this guide. We request you use the subject line: "OATS assistance."

Revision History

Date	Summary of Changes	Page(s)
January 2021	Initial release – Version 1.0	



Navigating This Guide

We have created two different ways for you to quickly and easily find instructions on a particular feature within your portal:

1. Click on a topic within the Table of Contents (above) to navigate to that section. Elsewhere in this document, click on underlined text in light blue to go to that section of this guide.
2. Press CTRL+F to open a dialog box to search this guide. Type in the feature/topic you wish to learn about and then either press ENTER or select the Previous, Next, or arrows within the dialog box to navigate through the results.

Introduction – Apprenticeship

Apprenticeship combines classroom studies with on-the-job training supervised by a trade professional. Much like a college education, it may take several years to become fully qualified in the occupation an individual chooses. Registered apprenticeship programs provide an educational experience that develops highly trained, knowledgeable, and skilled professionals.

Employer sponsorship and workplace training programs are vital to building the next generation of skilled workers. As an employer, there are many great reasons to offer a registered apprenticeship in the workplace. Apprenticeship training programs help businesses develop a highly-skilled workforce.

Apprenticeship, like many specialized fields, has its own specific vocabulary that can be confusing to newcomers. A guide to important [Key Terms](#) is available near the end of this guide.



Getting Started – Setup and Program Registration

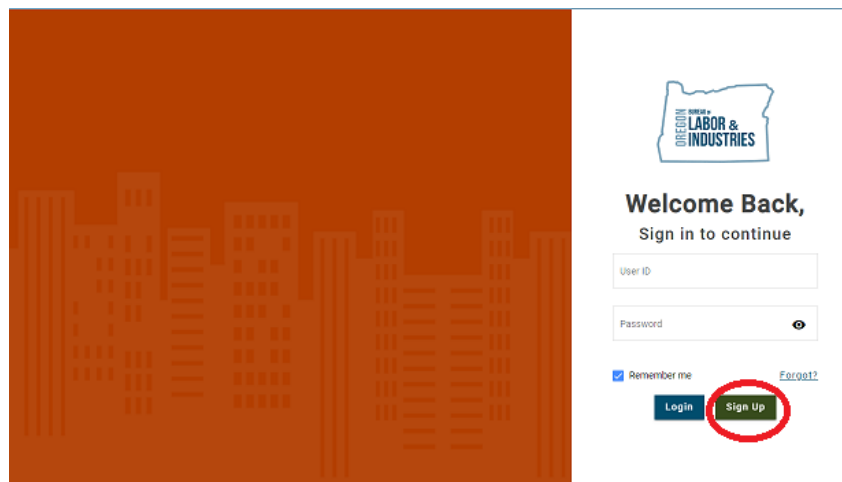
Setting Up a New User Account

All registered apprenticeship programs have been established in OATS. In order to begin using the recordkeeping functions in OATS, each program must identify an authorized user or users that can enter data into OATS on the program's behalf.

Tip: All information entered in OATS goes directly into the BOLI-ATD database as a permanent record of your program. Entering correct information is critical to tracking compliance to the regulatory requirements for apprenticeship program operations

New User Account Steps

1. Go to OATS website: <https://oatsportal.boli.oregon.gov/auth/login>
2. Click on Sign Up and follow instructions
3. When you are finished the portal will notify BOLI-ATD staff.
4. BOLI-ATD staff will activate your user account.
5. New Users will receive notification via email from ATD Portal confirming account activation.
6. User logs on to
7. On Welcome screen: Click Forgot button
 - a. This allows user to set up a password.

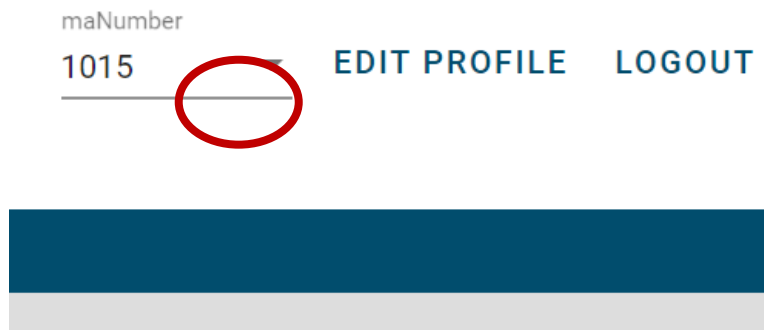




Once account has been set up, the user can then edit their profile to update password and contact information.

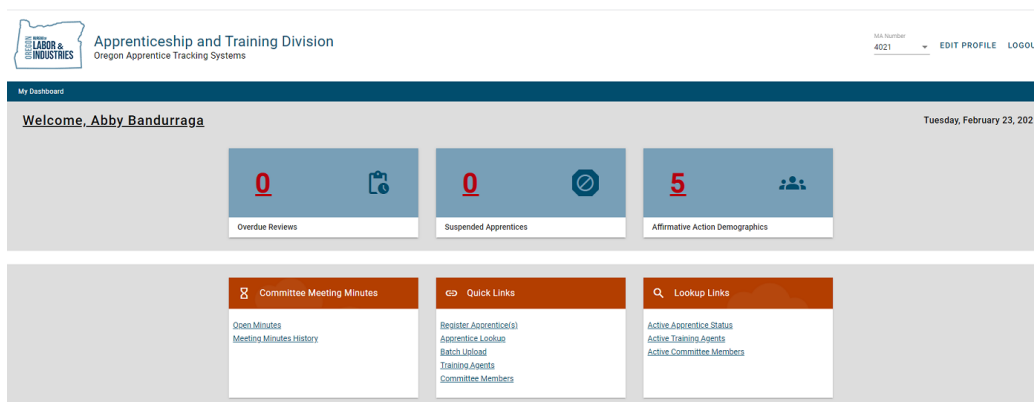
Administrators with Multiple Apprenticeship Programs

Administrators that are responsible for recordkeeping for multiple apprenticeship programs must complete all of the steps for setting up a new user account. Additionally, in the user request email, it is imperative to include the Master Agreement (MA) numbers for every program for which they are the administrator of record. This ensures that they will be able to access each of their individual programs on their dashboard.



Navigating in OATS

OATS Home Screen





Apprenticeship Program Dashboard

Apprenticeship and Training Division
Oregon Apprentice Tracking Systems

maNumber EDIT PROFILE LOGOUT

My Dashboard

Welcome, [redacted] Monday, January 4, 2021

- 116** Overdue Reviews
- 19** Suspended Apprentices
- 501** Affirmative Action Demographics

Overdue Reviews

Overdue reviews indicate that the apprentice listed has not received a review (RV), rerate (R), hold (H), or any other action in eight months or more. The Oregon Revised Statutes require every program to review their apprentices at least twice a year (ORS 660.137(4)).

The Overdue Reviews tab allows programs to see which apprentices should be evaluated so that programs can fulfill their obligations to apprentices and state regulations.

To open individual apprentice information:

1. Click on the arrow down button to review actions
2. Click on the apprentice name to view/update basic apprentice information

Apprentice Name	1	Agreeme...	Trade Name	Step	PCT%	Last Rera...	Status	Status D...	Last Acti...	Last Acti...		
▼	[redacted]	SHELDO...	113	159.0	Inside Electrician	4	60	04/01/2020	Active appr...	05/12/2020	05/12/2020	Reviewed -
▼	CAMPOS	[redacted]	113	159.0	Inside Electrician	5	65	01/01/2020	Active appr...	05/12/2020	05/12/2020	Reviewed -

Suspended Apprentices



The Suspended Apprentice tab lists all apprentices that are currently in a suspended status. This tab allows programs to keep track of apprentices that may be on extended leaves of absence or other suspensions so that the program can remember to evaluate these apprentices as well. Just as in the Overdue Review tab you can:

1. Click on the arrow down button to review actions
2. Click on the apprentice name to view/update basic apprentice information

Affirmative Action Demographics

The Affirmative Action Demographics tab allows program staff to easily see the demographics of their individual training standards as well as in their entire program. These numbers reflect real-time information and should be used to assist programs with establishing diversity goals, outreach, recruitment, and retention planning as required by state and federal law.

My Dashboard > Affirmative Action Demographics																				
No	Trade Name		Ethnicity							Hispanic		Gender			Disability					
1	159.0 Inside Electrician	333	American Indian	9	Asian	5	Black	3	Hispanic or Latino	19	White	297	Yes	0	Female	8	Male	325	Yes	0
2	459.0 Ltd Energy Tech A	13	American Indian	0	Asian	0	Black	0	Hispanic or Latino	1	White	12	Yes	0	Female	2	Male	11	Yes	0
3	159.1 Ltd Res Electrician	23	American Indian	0	Asian	1	Black	0	Hispanic or Latino	4	White	18	Yes	0	Female	1	Male	22	Yes	0
4	Total	369	American Indian	9	Asian	6	Black	3	Hispanic or Latino	24	White	327	Yes	0	Female	11	Male	358	Yes	0

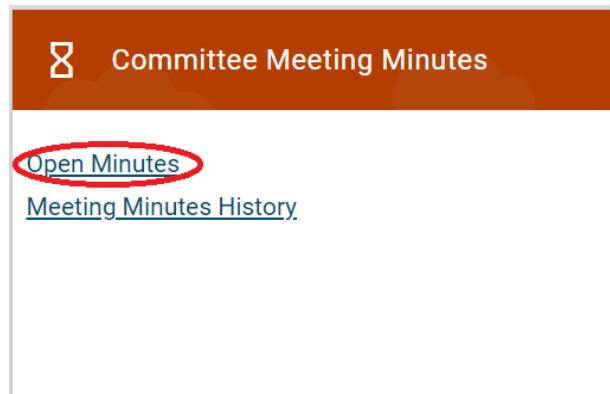
Navigation Links

Committee Meeting Minutes Open Minutes Meeting Minutes History	Quick Links Register Apprentice(s) Apprentice Lookup Batch Upload Training Agents Committee Members	Lookup Links Active Apprentice Status Active Training Agents Active Committee Members
--	--	--

Committee Meeting Minutes Tab

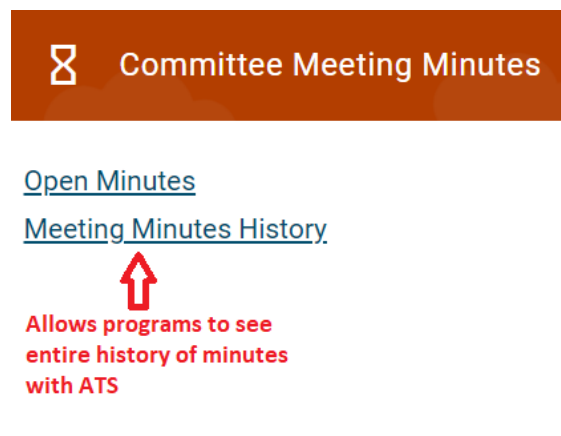
The Committee Meeting Minutes Tab allows program staff open a set of meeting minutes, view currently open minutes, and to see all past minutes that have been submitted to ATD.

Open Minutes



Open Minutes shows a set of minutes that is open and has not yet been submitted. This is the tab program staff can use to come back to a set of minutes they have started but aren't done entering actions for.

Meeting Minutes History



This link allows programs to see the minutes that they have previously submitted to ATD and which have been finalized.



NOTE: If you do not see a set of minutes in the Meeting Minutes History that you believe you have previously submitted, contact atdemail@boli.state.or.us.

Quick Links

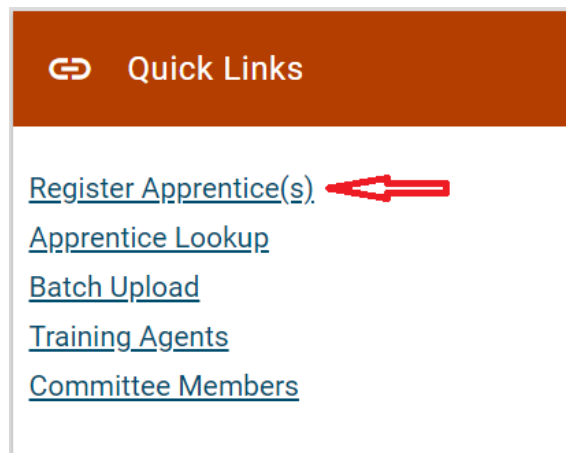
The Quick Links tab allows program staff to quickly navigate to commonly used activities necessary for the management of apprenticeship programs.

Instructions for Registering Apprentices, Training Agents, and Committee members and doing batch uploads are discussed in detail below.

Register Apprentices

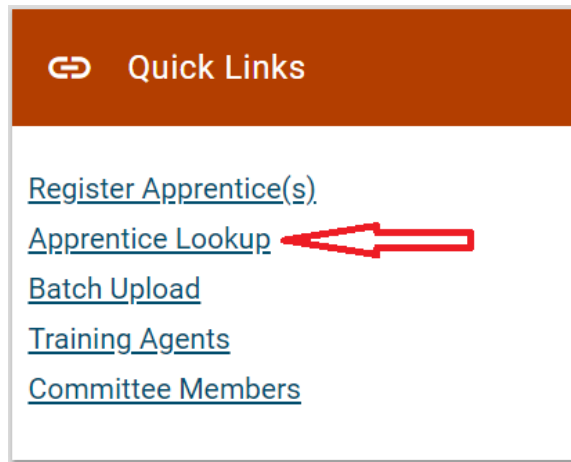
Takes the user to the area of the portal in which apprentices can be registered.

NOTE: There must be an open set of minutes to register or add actions for apprentices, training agents, and committee members or to do batch uploads.



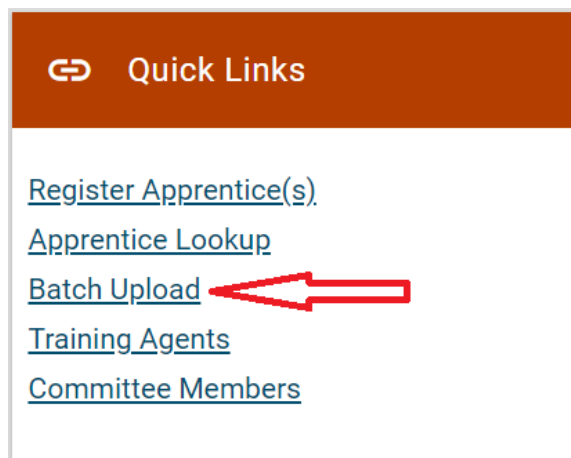
Apprentice Lookup

Allows the user to look up active apprentices by name or registration number.



Batch Upload

Takes the user to the Excel spreadsheet that can be used to upload a batch of apprentice actions.

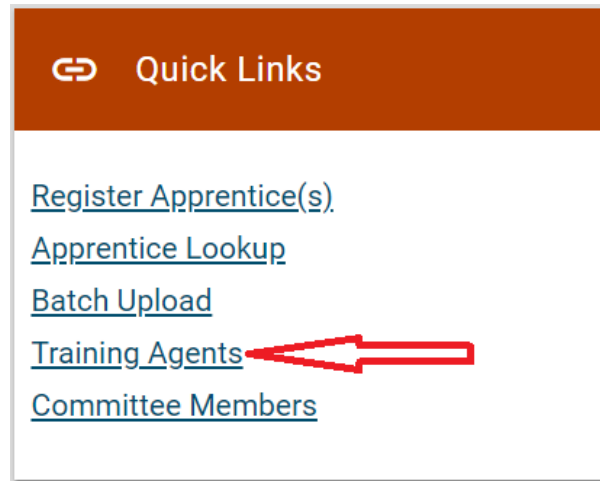


Training Agents

Allows the user to view all active training agents registered with their program. Users can search by company name or training agent registration number. Users can also update training agent contact information using this link. Also, use this link to Edit Training Agent Details or Withdraw a Training Agent.

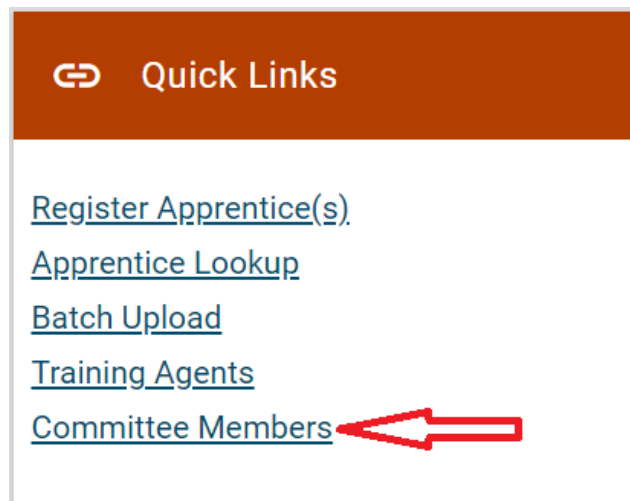
The Training Agent link in Quick Links is the only location in which a user can withdraw a Training Agent.

1. Click on the Training Agent Firm Name
2. Click on the “Edit Pen” if applicable
3. Click on the “Withdraw” button
4. Add the Date Withdrawn
5. Select Reason Code 1,2 or Other
6. Press “Submit” button



Committee Members

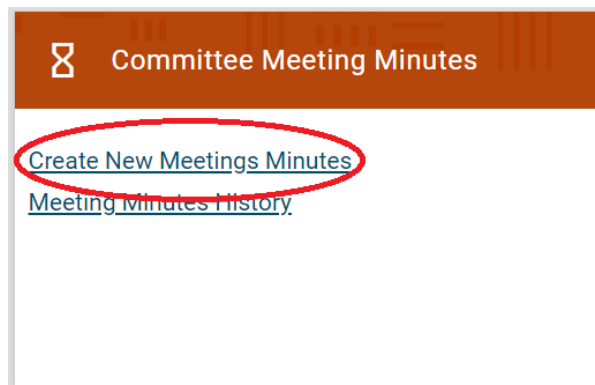
Allows the user to view all active committee members. Users can search by committee member first or last name or their employer name. Users can Edit Details or Status of committee members using this link.

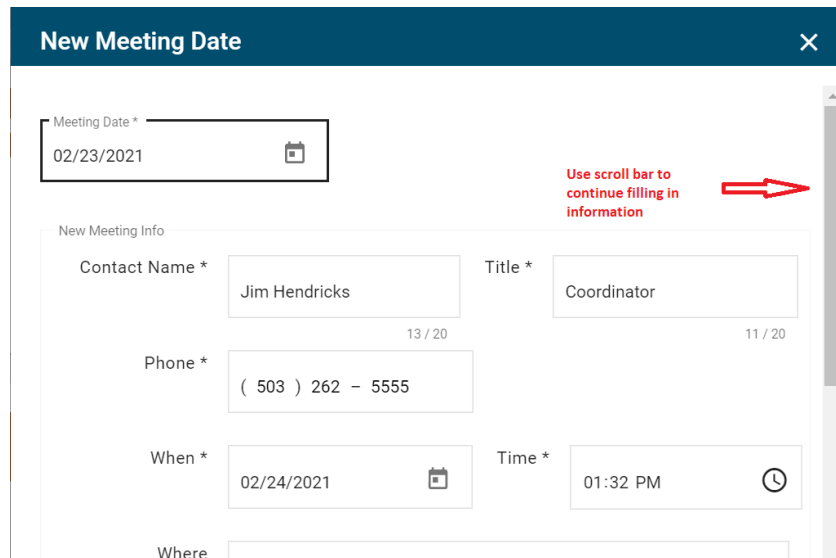


1. Click on Committee Member Last Name
2. Choose "Edit Details" to update demographics
3. Press "Submit" button
4. Choose "Edit Status"
5. Select "Status"
6. Select "Position"
7. Select "Principal/Alternate"
8. Select "Employer/Employee Representative"
9. Click "Submit"

Apprenticeship Program Actions

Opening a Set of Minutes





New Meeting Date [X]

Meeting Date *
02/23/2021 [Calendar icon]

Use scroll bar to continue filling in information [Red arrow pointing to scroll bar]

New Meeting Info

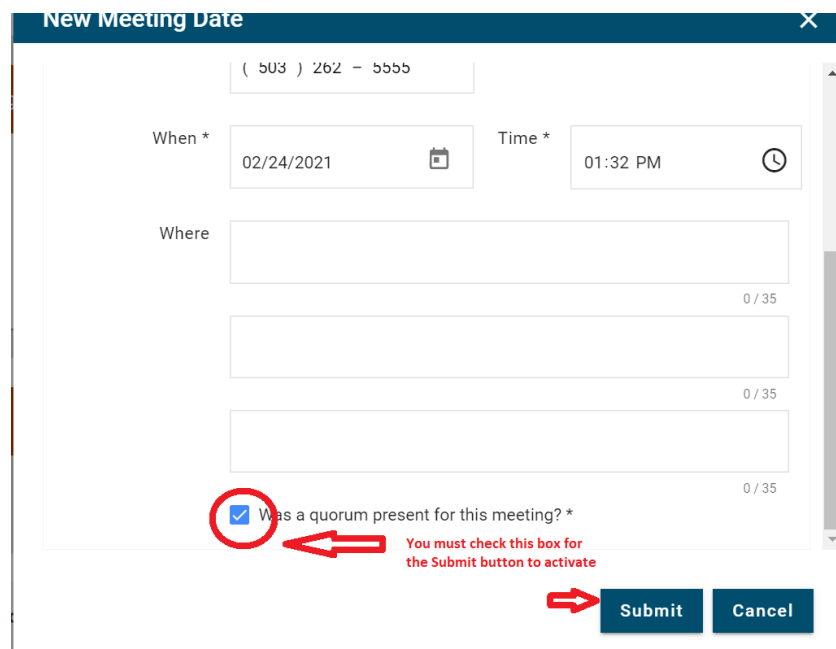
Contact Name * Jim Hendricks [13 / 20] Title * Coordinator [11 / 20]

Phone * (503) 262 - 5555

When * 02/24/2021 [Calendar icon] Time * 01:32 PM [Clock icon]

Where [Empty field]

1. Click on Meeting Date
2. Verify Contact Information is correct
3. Check the box labeled “Was there a quorum for this meeting”
4. Click “Submit” to open minutes



New Meeting Date [X]

(503) 262 - 5555

When * 02/24/2021 [Calendar icon] Time * 01:32 PM [Clock icon]

Where [Empty field] [0 / 35]

[Empty field] [0 / 35]

[Empty field] [0 / 35]

Was a quorum present for this meeting? * [Red circle and arrow pointing to checkbox]

You must check this box for the Submit button to activate [Red text]

[Red arrow pointing to Submit button] **Submit** **Cancel**



Registering an Apprentice

New Apprentices					Add
No	Apprentice Name ↑	Trade Name	Effective date	Prior Credits	
No apprentices for display					

Register a New Apprentice

Program Information

Trade Name (as listed in standards) * Exception Application *

Scroll down to complete registration →

Personal Information

Last Name * First Name * MI

Gender * Birth Date *

Register a New Apprentice

Effective Date * Prior Credit Starting Period *

All star fields must be completed to activate submit button ↑

Attachments

Drop Registration Agreement to Upload

← Apprentice Agreement must be uploaded to activate submit button

doc, pdf, jpeg, png only. Up to 100 Mb.

20201027153851319.pdf	64.92 kb	<input type="button" value="Delete"/>
-----------------------	----------	---------------------------------------

1. Click "Add"



2. Select Trade Name
3. Select Exception
4. Add Last Name
5. Add First Name
6. Add Middle Initial
7. Choose Gender
8. Add Birthdate
9. Choose Race/Ethnicity
10. Choose Veteran Status
11. Choose Disability Status
12. Add Address
13. Choose Zip or City
14. Choose Education from drop down
15. Choose Prism Consent
16. Add Effective Date
17. If needed, add prior Credit
18. Add Starting Date
19. Upload Apprenticeship Registration form
20. Click "Submit"

Apprentice Actions

1. Click Add
2. Choose apprentice from "Last Name" tab
3. Choose "Action Type"
4. Add "Effective Date" if applicable
5. Add "Review Date" if applicable
6. Add "OJT" if Terminating
7. Add "Rerate to Period"
8. Add "Rerate from Period" if applicable
9. Choose "Reason Code 1" if applicable
10. Choose "Reason Code 2" if applicable
11. Add "Other Reason" in text if applicable
12. Submit

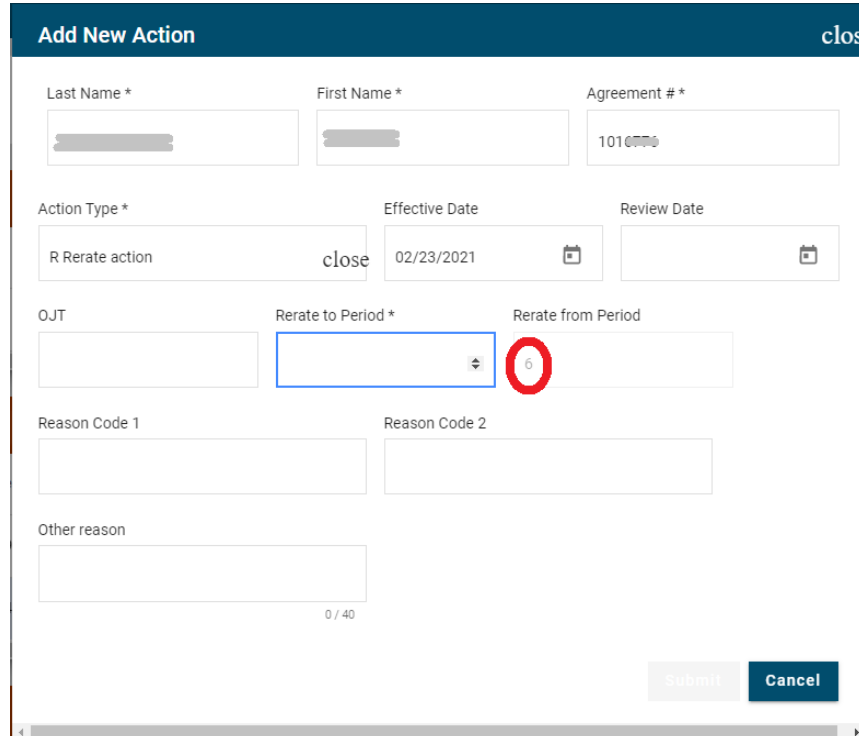
Completing an Apprenticeship

Users must go through two steps to complete apprenticeships.

NOTE: Completing an apprentices is a two-step process. First, the apprentice must be re-rated to 100% complete. After this action is finished, the apprentice can be completed in a separate action.

First, follow the instructions in the Apprentice actions section above and re-rate the apprentice to the final period. In the ATD database, an apprentice has to be re-rated to 100% to be considered as completed.

For example, if the program is a six (6) step program, the apprentice will need to be re-rated to period seven (7).



After the re-rate action has been completed, the user can then do step two.

Step two is to start a new action for the apprentice. Enter “C Complete” in the Action type field.

Using Batch Upload for Apprentice Actions

This section is being developed. Please note that the portal will only accept a batch upload from the template provided within OATS.



Training Agent Actions

Training Agents Add

No Firm Name ↑ Contact Name ↑ Type

1. Click on Add button
2. Select Trade Name
3. Select Type
4. Select Union, Mon-Union or Mixed
5. Add Firm Name
6. Add Contact Name
7. Add Phone Number, Extension or Fax if applicable
8. Add Email
9. Add Address
10. Zip or City
11. Add Mailing Details
12. Click on Same as Site Address if applicable
13. Add Application Date
14. Add Effective Date
15. Add Date Approved (will default to Meeting date)
16. Add Date Withdrawn, if applicable
17. Add Reason Codes, if applicable
18. Upload Training Agent Registration Form
19. Press "Submit"

Committee Member Actions

Committee Members Add

No Last Name ↑ First Name Employer Trade Name POS P/A E/R

No committee members for display

1. Click on Add Button
2. Add First and Last Name
3. Add Employer Name
4. Add Trade Name
5. Choose Position
6. Choose Principal or Alternate
7. Choose Employer or Employee Representation
8. Add Phone Number



9. Add Extension or Fax number if applicable
10. Add Email address
11. Add Address
12. Add Zip or City to populate State and County
13. Add Optional Address and phone number if applicable
14. Press "Submit"

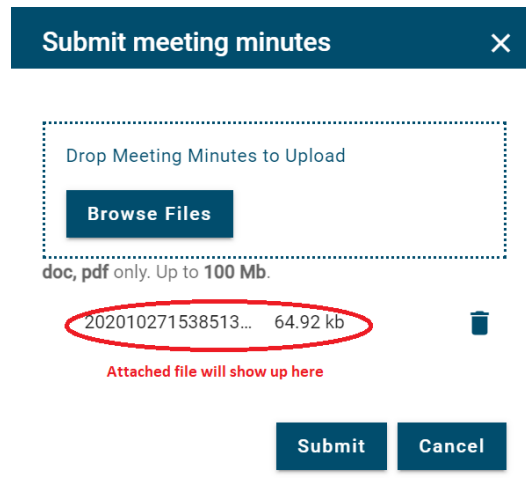
Submitting Minutes

When the user is done entering all actions they will need to submit the minutes. The red submit button will send the minutes to BOLI-ATD.

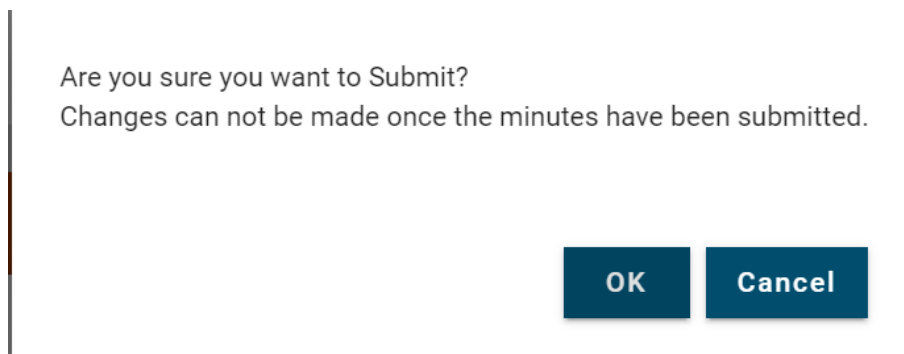
A screenshot of a user interface. At the top, there is a dropdown menu labeled "MA Number" with a downward arrow. To the right of the dropdown are two links: "EDIT PROFILE" and "LOGOUT". Below these elements is a large, empty rectangular box with a dark blue header bar at the top. In the bottom right corner of this box is a red button with the word "Submit" in white text.

NOTE: Once you hit the red submit button, you will not be able to make any more changes to this set of minutes.

The user will need to upload the minutes. When minutes have been successfully uploaded they will appear below the "Browse Files" box and the submit will become operational.



OATS will confirm that the user is ready to submit:



When the user selects “OK” they will no longer be able to make any changes to this set of minutes.

After the minutes have been submitted, the user will receive an email notifying them that meeting minutes have been submitted.

From: ATD Portal [<mailto:boli.atd.app@gmail.com>]
Sent: Wednesday, February 24, 2021 1:17 PM
To: Christy, Ila <christyi@boli.state.or.us>
Subject: Minute Submitted

The Meeting Minutes for MA#2020 (Meeting date: 01/20/2021) have been submitted

Thank you,
The Bureau of Labor and Industries, Apprenticeship and Training Division Program
Sponsor Team



ATD Support Team staff will review minutes for any supplemental information such as wage updates or standard revision information that needs to be passed on to ATD Work Teams. They will then approve the minutes. When the minutes are approved, users will receive the following email notification:

From: ATD Portal [<mailto:boli.atd.app@gmail.com>]
Sent: Monday, February 22, 2021 10:02 PM
To: Christy, Ila <christyi@boli.state.or.us>
Subject: Minute Finalized

Thank you for submitting your committee minutes using the Oregon Apprenticeship Tracking System (OATS).

The meeting minutes for 1058 on 01/22/2021 have been received and approved by the Apprenticeship and Training Division (ATD).

You will receive an email from ATD shortly with a copy of the reports for this set of meeting minutes.

You are now able to start a new set of minutes in OATS.

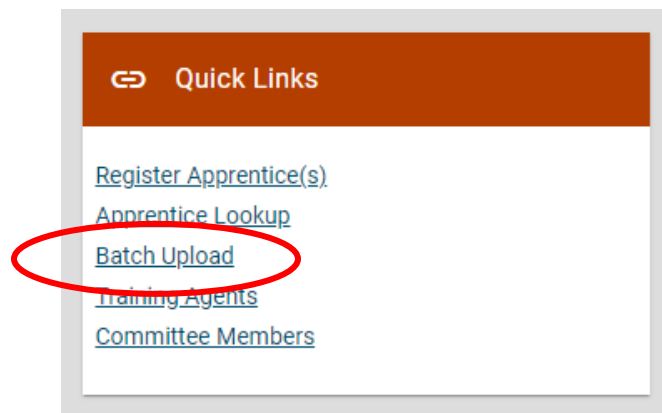
Thank you,
The Bureau of Labor and Industries, Apprenticeship and Training Division Program Sponsor Team

Additionally, ATD Support Team Staff will follow up with an email to the user which includes an Action report with new apprentice registration numbers.

Updating Apprentice, Training Agent, or Committee Member Contact Information

OATS allows program staff to update the contact information for Apprentices, Training Agents, and Committee Members without having to process these changes through official meeting minutes.

Change Apprentice Contact Information





1. Go to Quick Links on the program's homepage in OATS.
2. Select Apprenticeship Lookup
3. Choose Apprenticeship (Names will auto populate alphabetically)

My Dashboard > Apprenticeship Lookup

Apprenticeship Lookup

Apprenticeship Last Name	Apprenticeship First Name	Agreement #	Trade Name	Apprenticeship Status Active apprenticeship
--------------------------	---------------------------	-------------	------------	--

Total found: 880

4. Select Apprenticeship
5. Click on the pencil icon to access editing screen

My Dashboard > Apprenticeship Lookup > Apprenticeship Details

<p>XXXXXXXXXXXX (115XXXXXX)</p> <p>Status Active apprenticeship</p> <p>Personal Information</p> <p>Phone N/A</p> <p>Email N/A</p> <p>Address</p>	<p>Important dates</p> <table border="1"><tr><td>Registration</td><td>Transfer</td><td>Cancellation</td><td>Completion</td></tr><tr><td>02/11/2019</td><td>N/A</td><td>N/A</td><td>N/A</td></tr></table>	Registration	Transfer	Cancellation	Completion	02/11/2019	N/A	N/A	N/A	<p>Education</p> <table border="1"><tr><td>High School</td><td>Diploma</td><td>Trade School</td><td>College</td><td>Diploma</td><td>GED</td></tr><tr><td>12</td><td>No</td><td>N/A</td><td>2</td><td>No</td><td>No</td></tr></table>	High School	Diploma	Trade School	College	Diploma	GED	12	No	N/A	2	No	No
Registration	Transfer	Cancellation	Completion																			
02/11/2019	N/A	N/A	N/A																			
High School	Diploma	Trade School	College	Diploma	GED																	
12	No	N/A	2	No	No																	

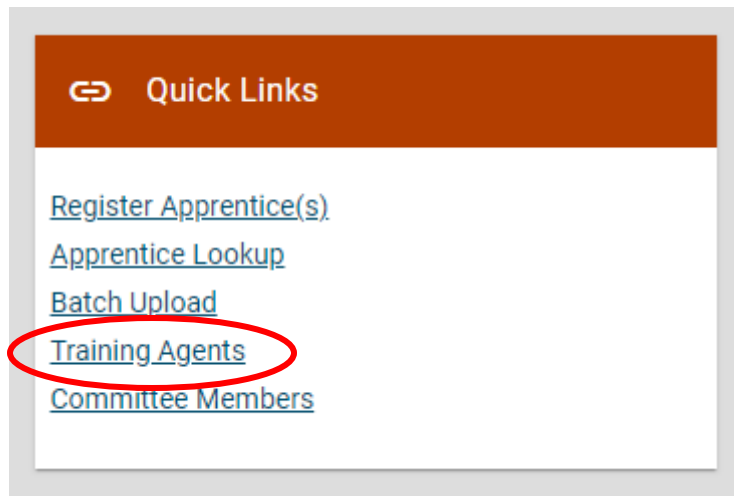
6. Update apprenticeship information
7. Click submit

Edit Apprenticeship Details

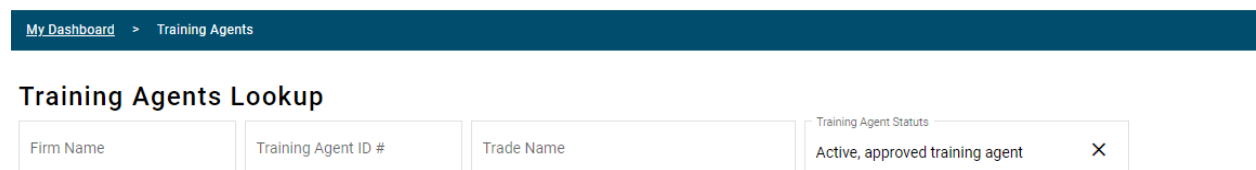
Phone (971) 971 - 5555	Email		
Address * 8 SW ELM WAY			
Zip * 97232	City * PORTLAND	State * OR	County * MULTNOMAH
Gender * Female	Race/Ethnicity * Asian	Veteran Status	Disability Status

Submit **Cancel**

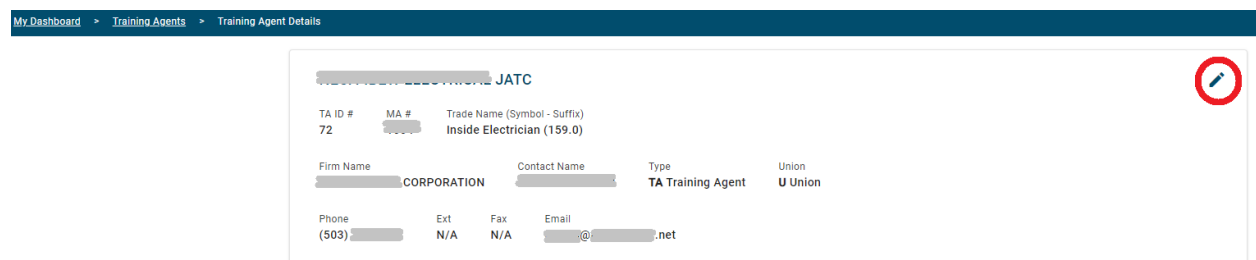
Change Training Agent Contact Information



1. Go to Quick Links on the program's homepage in OATS.
2. Select Training Agents
3. You can scroll through all active Training Agents, or
4. Begin typing Firm Name or Training Agent ID number in the lookup fields



5. Select Training Agent
6. Click on the pencil icon to access editing screen



7. Update Training Agent information
8. Click submit



4. Begin typing Last or First name in the lookup fields

[My Dashboard](#) > [Committee Members](#)

Committee Members Lookup

Last Name	First Name	Employer Name	Committee Member Status Active member ×
-----------	------------	---------------	---

5. Select Training Agent
6. Click on the “Edit Details”

AARON [REDACTED]				Edit Details
Employer Name	State Committee	Trade Name		
N/A	No			
Status	Position	Principal/Alt	Represents(E/R)	
A	M	P	E	

7. Update Training Agent information
8. Click submit



Edit Committee Member Details ✕

Committee Member Details

First Name * Last Name * State Committee


Trade Name (as listed in standards) Employer Name

Mailing Address/Phone

Phone Ext Fax Email

Address 1 * Address 2

Zip * City * ✕ State * ✕ County * ✕





Appendix

Apprenticeship – Key Terms

Action Code	The BOLI approved letter and/or number codes that indicated the type of activity a program wants to take with an apprentice. Action Codes include activities such as a rerate, exam referral, completion or termination
Apprenticeship Agreement	A written agreement between an apprentice, training agent, and program sponsor that records the entry of the apprentice into the program in accordance with the approved <i>standards of apprenticeship</i>
Committee	The organization responsible for overseeing the registered apprenticeship program, including the related activities of its training agents and apprentices
Committee Member	Individuals that represent both the employees and management side of a trade. Members are elected and approved by OSATC. Committee Members are responsible for the administration of an apprenticeship training program
Final OJT	Paid employment under the supervision of qualified experts in the trade or occupation
MA Number	Short for Master Agreement number. The assigned registration number for an approved apprenticeship program.
Minutes Date	The date the committee met and approved the apprenticeship actions. This may be different than the date which the
Occupation	The specific skilled trade or job a registered apprenticeship program is training for. Programs may provide training for more than one occupation and will have a separate Standard of Apprenticeship for each occupation they train for .
OJT – On-the-job Training	Paid training that occurs at a jobsite under the supervision of qualified experts in the trade or occupation.
Period	Preset blocks of OJT hours, as set out in the <i>apprenticeship standards</i> for the occupation under which the apprentice is registered. Different occupations will require between 1 and 8 steps to complete the registered apprenticeship. The committee for the program must review and approve this progress, as reflected by the minutes date required to advance an apprentice to the next step.
Program	Another way of saying “registered apprenticeship program”
Reason Code	The BOLI approve letter and number codes that indicate why a certain action was taken. Reason codes are required for certain



	action codes including, but not limited to Termination, Suspension, Notice to Appear
Registered Apprenticeship Program	An apprenticeship program reviewed and approved by the Oregon State Apprenticeship and Training Council (OSATC)
Rerate	The movement of an apprentice from one period/step to the next higher period/step. Rerates include a pay increase for apprentices as they gain more knowledge and skills in their occupation
RT – Related Training	Organized and systematic instruction designed to provide the apprentice with knowledge of the theoretical and technical subjects related to the apprentice's occupation. It may be provided in a classroom, lab, or remotely through online classes
Standards of Apprenticeship	A written agreement containing specific provisions for operation and administration of the apprenticeship program and all terms and conditions for the qualifications, recruitment, selection, employment, and training of apprentices, as further defined by the Oregon Revised Statutes Chapter 660, Section 126 (ORS 660.126)
Step	See “Period”
Suffix	See “Symbol.” Suffix codes are assigned as needed based on the program’s needs. A separate suffix code is used when a committee has two active standards for an occupation with the same symbol. For example, a committee that has an active sheet metal standard with an LEA license, and an active sheet metal standard without an LEA license, the symbol/suffix would be 0510.1 and 0510.0, respectively.
Symbol	The occupational identification used by BOLI and the federal Office of Apprenticeship to identify a specific occupation within an industry sector. Example: 0510 is the occupational symbol for a Sheet Metal Worker
Training Agent	Employer registered to both the Committee and BOLI to provide on-the-job training for apprentices