WORKSOURCE PORTLAND METRO

Regional Program Standards

| Focus: | ❑ WorkSource Centers   ☒ Youth Program Services |
| | ❑ Other: |

Topic: Next Generation Youth WorkSource Services

| Date: October 1, 2021 | ❑ New   ☒ Revised | Page 1 of 50 |

Overview

The focus of Next Generation Youth WorkSource (NextGen) services is career pathway preparation and training that leads to career track employment.

Participants will be co-enrolled in NextGen and WorkSource Oregon Workforce Innovation & Opportunity Act (WIOA) Adult and/or Dislocated Worker programs as appropriate. Co-enrollment allows participants to access complementary WorkSource services while they are participating in NextGen program services.

Contents

Eligibility Requirements

Service providers must establish processes that prepare potential participants to complete the eligibility and enrollment requirements for WorkSource Oregon and NextGen as outlined below.

The eligibility requirements for enrollment into NextGen services is determined based on the applicant's Education Status at registration – i.e., In-School (ISY) or Out-of-School (OSY). **Note:** *Refer to Addendum 1 for additional eligibility detail*.

Out-of-School

- WorkSource enrolled and WIOA documented
- Aged 17-24
- Not attending any school (secondary or post-secondary) as defined by State law
- Legal to Work in the United States
- Have at least one of the Qualifying Employment Characteristics
- Sex assigned male at birth and aged 18 and older must be registered for Selective Service

In-School

- WorkSource enrolled and WIOA documented
- Aged 17-21
- Attending school as defined by State law, excluding enrollment in YouthBuild, Job Corps and Adult Basic Education Title II programs
- Legal to Work in the United States
- Low Income (see below for additional detail and definition)
- Have at least one of the Qualifying Employment Characteristics
- Sex assigned male at birth and aged 18 and older must be registered for Selective Service

Low Income

To be determined low income, the applicant must meet one of the low-income qualifiers outlined in Addendum 1. The categories for consideration include:

- The total family income for the six months prior to eligibility determination is not more than 70 percent of the Lower Living Standard Income Level (LLSIL).
- The family received certain types of public assistance during the previous six months: Temporary Assistance for Needy Families (TANF), General Assistance, Refugee Assistance, Supplemental Security Income, Social Security Disability Income, Supplemental Nutrition Assistance Program (SNAP, i.e. food stamps).
- Eligible to receive Free or Reduced Lunch. This includes an OSY applicant who is a parent living in the same household as the child and where the child receives or is eligible to receive free or reduced-price lunch based on their income level.
- Residence is in a census tract within a high poverty area.
- Characteristics that automatically qualify a participant as low income: Foster Care and Homeless (which includes Runaway in its definition).

Applicants who have a disability are considered a separate family unit for purposes of income calculation; do not consider the applicant's parents/guardians/siblings in the family size calculation but do consider the applicant and any dependents they may have.

Qualifying Employment Characteristics

All applicants must meet one or more of the Qualifying Employment Characteristics to be enrolled in the NextGen program.

For Out-of-School Applicants
- Homeless or Runaway
- In or Aged Out of Foster Care
- High School Dropout
- Aged 17-18 and have not attended school for at least one quarter
- Justice System Involvement
- Pregnant or Parenting
- Person with a Disability (including learning disabilities)
- Deficient in basic literacy skills (if not attending school, have completed HS Diploma/GED/equivalent and are Low Income)
- English Language Learner (if not attending school, have completed HS Diploma/GED/equivalent and are Low Income)
- Is Low Income and meets one of these criteria indicating they Require Additional Assistance to complete an education program or to secure or hold employment:
  - Applicant has never held a job.
  - Applicant is between the ages of 18 and 24 and has never held a full-time job.
  - Applicant is between the ages of 18 and 24 and has been fired from a job prior to program application.
  - Applicant has quit post-secondary education without attaining a recognized credential.

For In-School Applicants
- Homeless or Runaway
- In or Aged Out of Foster Care
- Justice System Involvement
- Pregnant or Parenting
- Person with a Disability (including learning disabilities)
- Deficient in basic literacy skills
- English Language Learner
- Requires Additional Assistance to complete an education program or to secure or hold employment as evidenced by one of these criteria:
  - Applicant has never held a job.
  - Applicant is between the ages of 18 and 24 and has been fired from a job prior to program application.
  - Applicant is deemed at risk of dropping out of school.

- o Applicant has been placed on probation, suspended from secondary school, or expelled from secondary school.
- o Applicant has repeated at least one secondary grade level.
- o Applicant is behind the credit rate required to graduate from High School.

When staff have reviewed the program design and requirements with a potential participant and have determined the applicant is interested and a good fit for the NextGen program, documenting eligibility determination and enrollment into services can begin.

Where documents being used to validate eligibility for WorkSource or NextGen have an expiration date, they cannot be expired and serve as documentation under this policy.

Eligibility Process

Step 1: WSO Registration

All customers seeking services must complete the WorkSource Oregon (WSO) registration process as defined by the State of Oregon. Tracking of registration process completion is managed through the WorkSource Oregon Management Information System (WOMIS). The customer's acceptance of the disclosure information and data submission is their electronic WIOA application signature.

Once the WSO registration is complete, the customer must complete an iMatchSkills Profile and provide staff with an approved document that validates the date of birth entered into WOMIS. Staff enter the ID number or name in the appropriate field on the staff WOMIS screen and click the Welcome Complete box to finalize the process.

Step 2: WIOA Documentation for WorkSource

The following eligibility elements share documentation for the WorkSource enrollment and the NextGen enrollment. The WIOA Documentation for WorkSource is to be collected and either:

- Uploaded using the tool and process provided through I-Trac. Follow Customer Secure Document Upload Tools instruction found on the I-Trac Resources/User Instructions tabs.

- Copied and maintained in a customer file, secured in locked cabinets onsite at service provider/Center business location or scanned to an electronic file on a secure server with limited and password protected access.

> **Note:** Completing the Welcome process and WIOA Documentation is the responsibility of the service provider/Center where the documents are collected and data-entered in I-Trac. If there are eligibility documentation questions that arise during monitoring that lead to questioned or disallowed costs, the service provider or Center that managed the process is responsible for the questioned/disallowed costs.

Date of Birth/Age
A participant must be 17 years of age or older. A photocopy of one of the allowable documents which reflects a birth date that supports the participant's age is required:

Baptismal certificate	Passport
Birth certificate	Public assistance record
DD-214 Military Separation Record	School record or identification card
Government issued ID	Driver's License
Hospital record of birth	Tribal record

Legal to Work
Participant attestation is accepted. An affirmative answer must be reflected in the WSO Registration Tab data in I-Trac.

Selective Service

Documentation of compliance with the Selective Service registration requirement must be collected from all participants who are required to register – defined as:

- Sex-assigned male at birth
- **AND** a US Citizen **OR** immigrant residing in the US between the ages of 18 and 25
- **AND** are age 18 or older
- **AND** were born on or after January 1, 1960

Where the participant is required to have registered and has done so, documentation must be one of the following:

- Selective Service Online Verification Printout (web address https://www.sss.gov/RegVer/wfverification.aspx)
- Selective Service Registration Card
- Stamped post office receipt of registration

If documentation under one of the categories outlined below cannot be collected, the participant is not eligible to receive NextGen services. Participants who would like additional information regarding Selective Service registration may be referred to this website: https://www.sss.gov/Registration-Info.

17-Year-Old Applicants

All participants who were 17 years old when they engaged in NextGen services will be required to update their WSO registration and answer the Selective Service question regardless of their sex-assigned at birth; staff must update I-Trac. Participants who are sex assigned male at birth must register for Selective Service within 30 days of their 18th birthday (i.e. 30 days before or 30 days after their birthday); if they do not register, they must be exited from all program services.

All participants required to register who will turn 18 during either in-program services or follow-up services should be made aware of this requirement prior to final enrollment decisions. Participants who choose not to register and are exited from services will still be included in all program performance measures.

The documentation of Selective Service Registration after WIOA registration must be added to and maintained in the WIOA Documentation file. Once the NextGen service provider completes this registration a copy of the Online Verification Printout is to be added to the WIOA Documentation for WorkSource file.

Selective Service Exempt

Participants exempt from Selective Service registration:

- Sex-assigned female at birth
- **OR** born before 1960
- **OR** currently under the age of 18 (will be required to register within 30 days of 18th birthday)
- **OR** are a seasonal agricultural worker on a H-2A visa
- **OR** are a lawful non-immigrant on a current non-immigrant visa
- **OR** were incarcerated/hospitalized/institutionalized continuously between my 18th and 26th birthdays
- **OR** were not living in the United States between my 18th and 26th birthdays

- **OR** was on active US Military, Coast Guard duty or a student in an Officer Procurement Program continuously between 18th and 26th birthdays

Not Required/Exempt Documentation Requirements

Sex assigned female at birth; participant currently under age 18; participant born before 1960 – Customer attestation through the WOMIS registration data is adequate documentation for these three exemption reasons.

Non-Immigrant/Immigrant Status – Regardless of current U.S. Citizenship status, some immigrants may be exempt from registration:

- Participants sex-assigned male at birth and holding a valid seasonal agricultural worker H-2A visa must provide a copy of the visa.

- Participants sex-assigned male at birth who are between the ages of 18 and 26 may be exempt if they are on a current non-immigrant visa. Acceptable forms of supporting documentation are shown on Addendum 2 to these Regional Program Standards (and can be found at this website Non-Immigrant/Immigrant Allowable Documents).

- Participants sex-assigned male at birth who came into this country for the first time after their 26th birthday are not required to register for Selective Service. Acceptable forms of supporting documentation that establish first date of entry into the United States are shown on Addendum 2 to these Regional Program Standards (and can be found at this website Non-Immigrant/Immigrant Allowable Documents). The appropriate supporting document must show an entry date after the participant's 26th birthday.

Incarceration/Hospitalization/Institutionalization – Participants who were required to register but can provide documentation that they were incarcerated, hospitalized and/or institutionalized from their 18th birthday to their 26th birthday are exempt from registration. ***However, please note***: If at any time between their 18th and 26th birthday the participant was not incarcerated, hospitalized or institutionalized then they were required to register, and the exemption does not apply. If the participant did not register, then follow the requirements for documenting under "Required to Register and Did Not."

Military Service – If the participant was in the US Military, Coast Guard or Officer Training between their 18th and 26th birthday they are not required to register and their DD214 Military Separation Record is the documentation. ***However, please note***: If at any time between their 18th and 26th birthday the participant was not in the US Military, Coast Guard or Officer Training, then they were required to register, and the exemption does not apply. If the participant did not register, then follow the requirements for documenting under "Required to Register and Did Not."

Required to Register and Did Not

Participants who are required to be registered, who are over age 26, and cannot document that they are registered through one of the means listed above must complete the Selective Service System's *Request for Status Information Letter* and attach copies of the documentation required for their reason for non-registration.

Request Completed and Not Yet Submitted – A copy of the letter and supporting documents is to be provided to WorkSource, and a WIOA program manager must review it to determine that the participant has established by a preponderance of the evidence that the failure to register was not knowing and willful. If this determination is made the Request for Status Information Letter and documents are to be filed with all other eligibility documentation with the WIOA program manager approval signature, and the choice "Request for Status Information Letter & Support Documentation" selection in I-Trac is to be used.

The participant should be instructed to submit the Letter and documents as directed on the form for a formal determination by the Selective Service System. **Note**: It is not required that staff follow to assure the submission occurs nor is it required that the Selective Service System response be returned and filed. The WIOA program manager is authorized to make the determination at the time of WIOA documentation.

Request Submitted/Selective Service Response Received – If the participant already completed the Status Information Letter Request process with the Selective Service and has their Status Information Letter determination returned from Selective Service which says that they are found to be exempt from the requirement, a copy of the Response Letter is to be maintained as documentation and "Selective Service Status Information Letter (returned from Selective Service)" selection in I-Trac is to be used.

Dislocated Worker
Participant attestation of the qualifying dislocation date is accepted, and the Dislocated Worker designation must be reflected in the WSO Registration Tab data in I-Trac.

Priority of Service Documentation
Veteran's status and Low Income/Public Assistance receipt provide participants with priority of service consideration when that status can be documented as outlined below. _Lack of documentation does not preclude participants from receiving Individualized Career Services or Training_ but does eliminate the priority of service benefit. Documentation requirements to be considered for Priority of Service benefits are:

**Veteran Status**
A photocopy of the DD-214 Military Separation Record is required. If no document is provided _services can be provided_ but the participant will not report at the Federal level as a Veteran and priority of service will not apply.

**Low Income**
Participant attestation is accepted and must be reflected in the WSO Customer Registration maintained in WOMIS.

**Public Assistance**
All types of public assistance (TANF, General Assistance, Refugee Cash Assistance, Food Stamps, SSI) requires a photocopy of the verification from Oregon Department of Human Services. The verification must be in the participant's name. If no document is provided _services can be provided_ but the participant will not report at the Federal level as having the characteristic and priority of service will not apply.

Deficient in Basic Skills

Unable to compute or solve problems, or read, write or speak English at a level necessary to function on the job, in the individual's family, or in society. This may be determined by staff during the enrollment process while working with the applicant when at least one of the following elements are observed (and therefore assessed):

- Is enrolled in a Title II Adult Education and Family Literacy Act program, this also includes enrollment in English as a Second Language (ESL) class.

- Determined to be Limited English Skills proficient through staff-engagement and observation.

- Staff make observations of deficient functioning in completing forms, assisting in the development of a service strategy, or behaviors in group discussion settings.

- Information (in writing or through discussion with the participant) that an educational institution the participant engages or engaged with determined them to have a GPA at D or below within the previous six months.

- Qualifies for Special Education services or has an Individual Education Program (IEP) plan.

WIOA Documentation for WorkSource Checklist

The checklist is designed to ensure the documentation required by the US Department of Labor (DOL) for WIOA Adult/Dislocated Worker eligibility and priority of service is collected and maintained to support the correlating data elements in the customer registration system at the time documentation was verified and collected. Complete the checklist as documents are collected and uploaded.

Documentation information is maintained in I-Trac in the Documentation Tab. As documents are collected and uploaded, the appropriate information is entered in the I-Trac record. When the Documentation Results Control reflects no missing information, the Documentation Completion Control can be data-entered, and the documentation tab will lock. At this point an Eligibility Determination Report (EDR) should be printed.

The documents are to be stapled together in this order and filed in a secure (locking) file at the location where documentation occurred, and retrievable for funder monitoring:

- Completed documentation checklist
- Document(s) that did not have I-Trac upload available (if any)
- EDR

Step 3: NextGen Eligibility Determination and Documentation

NextGen ISY/OSY Eligibility Guide

The Eligibility Guide documents details for eligibility determination and must be completed with each Applicant and signed by the staff person completing eligibility. This serves as staff attestation to the accuracy of eligibility elements. The date of the Eligibility Guide must be prior or equal to the Registration date.

Income Calculation Worksheet

This worksheet verifies family and household income and must be completed with each Applicant. The date of the worksheet must be prior or equal to the Registration date.

Basic Skills

Youth seeking services through NextGen will be assessed to determine their basic skill level at the point of eligibility determination and enrollment. Basic Skills Deficient is defined as:

1. Have English reading, writing, or computing skills at or below the 8th grade level on a generally accepted and approved standardized test.

   Or

2. Unable to compute or solve problems, or read, write or speak English at a level necessary to function on the job, in the individual's family, or in society. This may be determined by staff during the enrollment process while working with the youth when at least one of the following elements are observed (and therefore assessed):

   - Information (in writing or through discussion with the participant) that an educational institution the participant engages or engaged with determined them to have a GPA at D or below within the previous six months.
   - Qualifies for Special Education services or has an Individual Education Program (IEP) plan.
   - Is enrolled in a Title II Adult Education and Family Literacy Act program, this also includes enrollment in English as a Second Language (ESL) class.
   - Determined to be Limited English Skills proficient through staff-engagement and observation.
   - Staff make observations of deficient functioning in completing forms, assisting in the development of a service strategy, or behaviors in group discussion settings.

Objective Assessment

An objective assessment is to be completed to determine service needs; the assessment is to be maintained in file with eligibility documents. The date of the assessment must be prior to the Registration date.

Individual Career Plan

Develop an initial Individual Career plan to document the anticipated service strategy that aligns with the program design. The initial plan date must be prior to the Registration date and is to be maintained in file with eligibility documents. The Individual Career Plan will be updated as the participant engages in NextGen services. See *Individual Career Plan* service definition in these regional program standards.
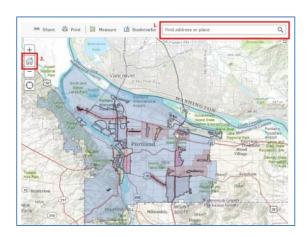
Identify Residence

For applicants who live in Multnomah County, the address must be checked to determine if they reside within the city limits of Portland. Staff must look-up the residence address provided by the applicant in the City of Portland's ArcGIS map (link at http://bit.ly/M6nyjQ) to verify this requirement. Input the address in the search bar and click the search icon (1. on picture). The map will focus down to the actual street location. Once at the street location click the home icon (2. on the picture) to expand back out. If the address is within the blue area outline it is within the City Boundary. Staff attest to having verified the address via the documentation dropdown selection in the Residence control in I-Trac.

Disclosures

Provide and discuss the social security number (SSN) disclosure and the grievance and equal opportunity rights disclosure to ensure the participant understands their rights.

> *Note*: The SSN Disclosure and Grievance/EEO disclosure are one document with the SSN disclosure on one side and the Grievance/EEO disclosure on the reverse.

Eligibility Determination

Enter all data into the Registration Tab in the I-Trac NextGen enrollment record, determine NextGen eligibility in the Registration Results and print the Application from the Customer Documents menu for signature (including a parent or guardian signature for applicants under age 18).

Review

Upon receipt of the signed I-Trac Application, the final eligibility review is conducted, NextGen eligibility documents are filed and the I-Trac record locked by the Reviewer.

Once the I-Trac Application is signed and the process complete, the file is to be reviewed by a second staff member who has been designated and trained to conduct eligibility reviews. The eligibility determination must be reviewed within 45 days of completing the WIOA Documentation process at WorkSource (the Registration date).

Once the review is complete, the Reviewer enters the review date in the I-Trac record (which becomes locked from any further edits of eligibility data), signs the I-Trac Application and the eligibility process is complete.

Enrollment

The Applicant must begin participation in NextGen services within 45 days of registration to be enrolled.

NextGen Eligibility Documentation Checklist

The checklist is designed to ensure the documentation required by the DOL for WIOA Youth eligibility and local funding requirements for City of Portland and Multnomah County is collected and maintained to support the correlating data elements in I-Trac. Complete the checklist as documents are collected.

Documentation information is maintained in I-Trac at the Registration Tab. As documents are collected, copied and/or reviewed and/or uploaded, the appropriate information is entered in the I-Trac record. When the Registration Results Control reflects no missing information and shows the customer to be eligible for either "WIOA" or "EOI," the Registration Completion Control can be data-entered, and the Registration tab will lock.

The documents are to be stapled together in this order and maintained in the participant file, which must be stored in a secure (locking) file at the location where enrollment occurred:

- Completed documentation checklist
- Photocopies of document(s)/forms that did not have I-Trac upload available
- Signed Application
- NextGen ISY/OSY Eligibility Guide
- Income Calculation Worksheet
- Objective Assessment and Individual Career Plan

Ineligible Customers

Applicants who do not meet the NextGen eligibility requirements for enrollment should be referred to other programs in the local area that may be available to provide similar services. WorkSource Center services should be reviewed and discussed, and the participant referred to MyWorkSource for additional service options. Formal referrals are not required.

All costs associated with participants found to be ineligible after receiving program-funded services will be disallowed

Addendum 1 – WIOA Youth Eligibility

Reflecting Portland Metro Local Area Policy Decisions

Eligibility	Out of school - OSY	In school - ISY
Education Status (determines ISY/OSY)	• Out of School – Completed HS Diploma/GED/Equivalent • Out of School – Dropped out or expelled from High School or Less • Out of School – School Age (16-18) and Not Attending School for at Least 1 Quarter	• In School – Alternative High School for GED[1] • In School – Alternative High School for Diploma[1] • In School – High School or Less • In School – College or Post High School Technical Training
Age	17-24 (local policy may limit ages)	17-21 (local policy may limit ages)
Legal to Work	Yes	Yes
Selective Service Registration	Yes - where required	Yes – where required
Low Income (or Low Income Waiver)	Yes, If ONLY Qualifying Employment Characteristic Type is from Low Income Category C	Yes, If ONLY Qualifying Employment Characteristic Type is from Low Income Category C

Defined:	At least one of the following applies:
	• 6 Month Family Income: LLSIL
	• Eligible to Receive Free or Reduced Lunch
	• Census Tract (High Poverty Area)
	• Family is receiving one of the following Public Assistance types in last 6 months:
	   ○ TANF
	   ○ General Assistance
	   ○ Refugee Assistance
	   ○ Supplemental Security Income (SSI, Title XVI)
	   ○ Social Security Disability Income (SSDI)
	   ○ Food Stamps (SNAP)
	• Auto Low Income Characteristic Type is from Category A below
		At least one of the following applies:
		• 6 Month Family Income: LLSIL
		• Eligible to Receive Free or Reduced Lunch
		• Census Tract (High Poverty Area)
		• Family is receiving one of the following Public Assistance types in last 6 months:
		   ○ TANF
		   ○ General Assistance
		   ○ Refugee Assistance
		   ○ Supplemental Security Income (SSI, Title XVI)
		   ○ Social Security Disability Income (SSDI)
		   ○ Food Stamps (SNAP)
		• Auto Low Income Characteristic Type is from Category A below

Qualifying Employment Characteristic Types	**Have at least one Characteristic below and follow the Low Income Category for that Characteristic.**	**Have at least one Characteristic below and follow the Low Income Category for that Characteristic.**
Low Income Category A: Automates Low Income Status by Definition	• Foster Care • Homeless/Runaway	• Foster Care • Homeless/Runaway
Low Income Category B: Low Income Status Not Required	• Aged Out of Foster • Disabled (including learning disabilities)[2] • Parenting[2] • Pregnant • School Dropout (High School or Less)[3] • School Age (16-18) and Not Attended School For at Least 1 Quarter • Justice System Involvement[4]	

Low Income Category C: Low Income Status is Required if there are only characteristics from this category	• Where Education Status = Not in School – Completed HS Diploma/GED/Equivalent AND one of the following applies:
	   ○ Deficient in Basic Literacy Skills
	   ○ English Language Learner
	• Requires Additional Assistance
		• Aged Out of Foster
		• Deficient in Basic Literacy Skills
		• Disabled (including learning disabilities)[2]
		• English Language Learner
		• Justice System Involvement[4]
		• Parenting[2]
		• Pregnant
		• Requires Additional Assistance

See next page for footnotes.

1 Alternative School includes schools funded in part or in full with Department of Education funds where the school receives (ADM) money from the State of Oregon for the student enrolled. NOTE: Title II programs funded by Department of Labor like YouthBuild or Job Corps **are not** considered to be Alternative Schools.

2 Separate Family Calculation. Do not consider Parents/Guardians/Siblings. If parenting youth, must count dependents.

3 Per Oregon Department of Education: **A dropout is a student who withdrew** from school and did not graduate or transfer to another school that leads to graduation. Dropouts do not include students who:
- are deceased,
- are being home schooled,
- are enrolled in an alternative school or hospital education program,
- are enrolled in a juvenile detention facility,
- are enrolled in a foreign exchange program,
- are temporarily absent because of suspension, a family emergency, or severe health problems that prevent attendance at school,
- received a GED certificate,
- received an adult high school diploma from a community college.

4 Justice System Involvement is defined in TEGL 21-16 page 4 and includes Offender and Subject to Juvenile or Adult Justice.

Addendum 2 – Selective Service

LIST OF ACCEPTABLE DOCUMENTS

DO NOT send original documents.
COPIES ONLY

IMMIGRANTS/NONIMMIGRANTS may present a combination of

[One selection from List A AND one from List B] OR [One Selection from List A AND one from List C AND one from List D].

Documents that Establish IDENTITY		Documents that Establish FIRST DATE OF ENTRY into the United States. Documents must cover entire duration in the United States				
		First Date of Entry to U.S. after reaching 26 years of age		First Date of Entry to U.S. was before turning 26 YEARS OLD Provide proof from first entry and any others.		
LIST A	**AND**	**LIST B**	**OR**	**LIST C**	**AND**	**LIST D**
1. Foreign Passport containing photograph, Visa, and U.S. Customs and Border Protection (CBP) Entry stamp.		1. Students on an F or M category U.S. Visa can submit a USCIS I-20 Form.		1. Foreign Passport with U.S. Customs and Border Protection (CBP) Entry stamp.		1. Students on an F or M category U.S. Visa can submit a USCIS Form I-20.
2. USCIS issued Resident Card (Green Card)		2. Nonimmigrants on a U.S. Visas can submit a USCIS I-94 Form with Entry stamp or Electronic I-94 showing First Date of Entry.		2. USCIS Form I-94 with Entry stamp or Electronic I-94 showing First Date of Entry.		2. Certified copy of school records/transcript issued by a school accredited by a U.S. state, jurisdiction or territory. A report card is not accepted.
3. Driver's license or ID card issued by a State or outlying possession of the United States provided it contains a photograph or information such as name, date of birth, gender, height, eye color, and address		3. Official letter from U.S. Citizenship and Immigration Services (USCIS) indicating that the individual's First Date of Entry and lawfully in the U.S. under a valid, nonimmigrant visa status.		3. Boarding passes the individual used to enter the U.S. It must show the Date of Entry/Arrival. (Can only be used if submitting Foreign Passport off of List A)		3. USCIS Form I-797 (A/B/C/D) Notice of Action displaying individual's name. (Depending on the purpose and nature of the form, the I-797 may not be accepted. The I-797 for an I-765 petition is not accepted.)
4. ID Card issued by federal, state, or local government agencies or entities, provided it contains a photograph or information such as name, date of birth, gender, height, eye color, and address		4. Official school letter from school registrar's office indicating that the individual's Enrollment Date and status as an International Student.		4. Official letter from U.S. Citizenship and Immigration Services (USCIS) indicating that the individual's First Date of Entry and lawfully in the U.S. under a valid, nonimmigrant visa status.		4. Official company letter from company's human resource office indicating the individual's employment start date and employment status.
5. Driver's license issued by Canadian government authority		5. Boarding passes the individual used to enter the U.S. It must show the Date of Entry/Arrival. (Can only be used if submitting Foreign Passport off of List A)				5. Those traveling on Department of State issued BCV and in the U.S. more than 30 days, must provide all entry and exit dates.
6. USCIS issued I-766 Employment Authorization Card		6. USCIS Form I-797 (A/B/C/D) Notice of Action displaying individual's name. (Depending on the purpose and nature of the form, the I-797 may not be accepted. The I-797 for an I-765 petition is not accepted.)				
7. Department of State issued Border Crossing Card (BCC).		7. Documentation indicating residence was in another country; outside the United States. Accepted evidence with name and foreign address includes, but not limited to: a) Dated pay slip or vouchers from an employer; b) Certified copy of school records/transcript issued by a school outside the U.S; c) Photocopies of entry or exit stamps in passport to indicate entry into another country after departing U.S.; d) Dated bank records showing transactions in your home country to indicate you were not in the U.S.				
8. Department of State issued Border Crossing Visa (BCV).						

LIST OF ACCEPTABLE DOCUMENTS

NONIMMIGRANT VISAS CATAGORIES	
A/G – Diplomatic and International Organization Personnel	**I** – Media Representatives
B – Visitors for Business or Tourism	**L** – Intracompany Transferees
O – Individuals of Extraordinary Ability or Achievements	**J** – Exchange Visitor
Q – Cultural Visitor	**P** – Athletes and Entertainers
E-1/E-2 – Treaty Traders and Treaty Investors	**R** – Religious Workers
H-1B/E-3 – Special Occupation Workers	**TN** – NAFTA Professional
H-2 – Temporary Agricultural and Non-Agricultural Workers	**K/V** – Nonimmigrants Intending to Adjust Status
H-3 – Trainees	**F/M** – Student; Academic, Vocational

*If you entered the United States with the last five (5) years, you can access your CBP arrival/departure record information (Form I-94) online at https://i94.cbp.dhs.gov/I94/#/history-search.

Service Design and Definitions

Engagement in services provided through NextGen is tracked and managed through I-Trac. When entering service activities in I-Trac, use these definitions to ensure the appropriate service and any corresponding file documentation align with the activities in which the participant is engaged. All services accessed by a participant must be documented in I-Trac regardless of where the service is delivered, including referrals to partner organizations or schools who provide the direct service.

WIOA Program Elements

The WIOA requires that 14 program elements be available to all participants through program service design or by referral to another local program:

1. Tutoring, study skills, drop-out prevention services.
2. Alternative secondary school services or dropout recovery services.
3. Paid and unpaid Work Experience – including summer employment, pre-apprenticeship programs, internships and job shadowing, On-the-Job Training.
4. Occupational skills training.
5. Education offered concurrent with workforce preparation activities and training in a specific occupation or occupational cluster.
6. Leadership development.
7. Support services.
8. Adult mentoring.
9. Follow-up services.
10. Comprehensive guidance and counseling – mental health and drug and alcohol counseling.
11. Financial literacy education.
12. Entrepreneurial skills training.
13. Services that provide labor market and employment information about in-demand industry sectors.
14. Post-secondary preparation and transition activities.

In-Program Services

Activities and services provided after enrollment in NextGen and until exit to Follow-Up. Services are related to the development of competencies and skills, and completion of short- and long-term employment and education goals as reflected in the Individual Career Plan.

- Participants regularly meet one-on-one and in groups with their Career Coach and/or Skills Trainers for job readiness training and career awareness, career counseling and career exploration. These meeting and participation activities are to be documented in I-Trac. There needs to be service engagement at minimum once every 90 days.

- In-Program services are complete when a participant attains a secondary credential, is basic skills sufficient, enters post-secondary education or training and/or begins employment in a career pathway job.

Adult Mentoring
(WIOA Youth Element 8)

A mentor provides support toward achievement of the participant's personal, educational and career goals. Adult mentoring must be a formal relationship that includes structured activities where the mentor offers guidance, support and encouragement to facilitate personal growth, educational achievement, career entry and life-long learning.

Participants must be linked with an adult mentor for at least 12 months, which may occur while the participant is In-Program and/or in Follow-Up. While group mentoring and mentoring through electronic means are allowable, at minimum programs must match the participant with an individual mentor with whom the participant interacts on a face-to-face basis. Mentoring may also include workplace mentoring where a participant is matched with an employer or employee of a company.

Career Coaching
(WIOA Youth Element 13)

Career Coaching services provide labor market and employment information about in-demand industry sectors or occupations available in the local area such as career awareness, career counseling and career exploration (see more detail below) services.

- Career awareness is the process by which the Career Coach helps the participant develop knowledge of the variety of careers and occupations available across a wide range of industry sectors; the skill requirements, working conditions and training prerequisites; and the job opportunities.
- Career coaching provides advice and support in helping the participant make decisions about what career path to take. Career coaching services may include providing information about resume preparation, interview skills, potential opportunities for job shadowing, and the long-term benefits of postsecondary education and training.
- Career exploration is the process in which the participant chooses an educational path and training or a job which fits their interests, skills and abilities.

The primary purpose of career coaching is working with participants to set achievable personal, education, training and/or employment goals and then to guide, coach, support and coordinate services and participation as they progress along a skill development pathway leading to achievement of those goals and economic and personal independence, self-sufficiency and employment in jobs with career potential. Career coaching staff functions include but are not limited to:

- Assist in identifying career and education goals.
- Develop with the participant a plan that incorporates a customized set of NextGen and WorkSource services, including Career Bridge training and outside resources that will assist the participant in meeting their goals.
- Coach participants in the personal and interpersonal ("soft" or "life") skills required to obtain and retain employment and post-secondary placement.
- Assist participants in identifying and securing the resources and supports necessary to succeed in their training and career plans.
- Facilitate collaboration between the different service providers working with the participant to synchronize career and education goals and align resources.

- Coach participants in job search including resume review, interview coaching, and career advising.
- Management of the tracking, documentation and reporting requirements of program participation and performance.

Career Exploration
(WIOA Youth Element 13)
Industry-specific career exposure to training and employment opportunities in high-wage, high-demand occupations and includes introduction to all four of the Portland Metro local area target industry sectors – manufacturing, healthcare, construction, and information technology/software. The Careers NW website will be used as one tool to provide Career Exploration services.

Career Mapping Workshop
This workshop is the first step of the Career Mapping process. Participants identify their strengths, gifts and capacities, the qualities that enable them to be successful in the work environment, and potential jobs. Refer to the Career Mapping Manual for additional information and detail. Career Mapping must be completed with a participant within the first 90 days of program participation.

Career Related Learning Experience (CRLE)
(WIOA Youth Element 13)
Activities designed to inform participants of career options available to them in their fields of interest. Activities may include the study of career opportunities in certain fields to identify potential careers, job shadow, field trips, guest speakers, writing individual learning plans that dovetail with career pathways and review of local labor market information. Career exploration involves activities that usually provide exposure to the workplace, connecting classroom learning to work. Services include:

CRLE – Company Tour
A site visit with a group of participants to view an organization's facility and operation. Participants explore career options and the world of work by observing the worksite and asking questions about jobs, skills, and tasks performed by the employees of the company. Site visits typically last one to four hours and the group sizes vary.

CRLE – Guest Speakers
Speakers address participants in a classroom, auditorium or at a community event. They allow a large group of participants to hear firsthand about an occupation, business, or industry.

CRLE – Informational Interview
Allows a participant to explore an occupation and gather information about the necessary preparation, required knowledge, and other facts that help participants broaden their vision of career fields, gain exposure to different adult role models, and understand the connection between school, work, and achieving goals. The interview can take place in person or by phone.

CRLE – Mock Interview
Helps participants develop and practice job interview skills. Employers who regularly interview job applicants (often human resource professionals) set up interview sessions with participants to help them prepare for future interviews. After the interview participants are given constructive feedback.

College and Career Readiness
(WIOA Youth Element 14)
College and career readiness refer to the content knowledge, skills and habits that participants need to be successful in post-secondary education or training that leads to a sustainable career.

A College and Career Readiness competency matrix regional model has been adopted to identify and evaluate progress toward key proficiencies that contribute to a participant's college and career readiness. Proficiencies are organized into five competency domains and four associated levels.

Competency Domains
- **Academic Skills –** Proficiencies include test- and note-taking strategies; problem formulation and testing; analyzing and synthesizing information; literacy and numeracy; post-secondary awareness; and academic assessments including basic skills assessments, National Career Readiness Certificate assessment, College Placement exams, or college transcripts.
- **Adaptability –** Proficiencies include responds positively to change and sees change as an opportunity; open to new experiences that improve knowledge and skills; tries out new roles within a team; identifies situations and barriers that impact performance; manages stress and setbacks professionally; and learns from experiences.
- **Collaboration –** Proficiencies include offers help and ideas; considers, values and respects multiple points of view; deals appropriately with team diversity; handles conflict constructively; builds and maintains positive relationships; and encourages others to share their ideas.
- **Communication –** Proficiencies include knows when and how to use phone, email, the internet and other computer applications to communicate; uses social media properly; is an active listener; presents information that is appropriate in content; understands basic etiquette and rules in nonverbal, verbal and written communication; and writes with correct spelling and grammar.
- **Problem Solving –** Proficiencies include assesses a situation or issue; brainstorms and tests to identify possible solutions; gathers feedback from others; considers diverse viewpoints on an issue or problem; seeks guidance or support when assignments exceed ability, time demand, role or position; and seeks guidance and support to test out solutions.
- **Self-Awareness –** Proficiencies include accepts and uses feedback to enhance skills; maintains self-control; demonstrates ethical behavior; shows awareness of how behavior impacts others; learns and follows rules and guidelines; dresses appropriately for the work environment; acknowledges mistakes and takes personal responsibility; understands and performs to required expectations; and good attendance and punctuality.

Competency Matrix levels
- **Level 1 – *Needs Significant Development*:** Improvements needed in one or more competency domains to be ready for transition to post-secondary education or entry-level employment.
- **Level 2 – *Show Growth – Needs Development*:** Demonstrates baseline competencies needed to enter a post-secondary training program or be hired for an entry-level employment opportunity.
- **Level 3 – *Meets Expectations*:** Demonstrates competencies needed to successfully progress in credit-bearing coursework and/or retain employment.
- **Level 4 – *Exceeds Expectations*:** Demonstrates competencies needed to obtain a college degree and/or progress along a career-pathway.

Competency Assessment Tools

- **Essential Workplace Skills Evaluation –** A standardized rating scale used to assess participant's performance on each proficiency within each college and career readiness competency area. This evaluation should be completed just prior to Exit to Follow-Up if one has not been completed within the past six months. An academic score is required for the Exit Assessment.
- **Worksite Supervisor Evaluation –** A standardized assessment tool used to evaluate a participant's performance on the proficiencies encompassed in the first two levels of the Competency Matrix.

Education and Training Services

The NextGen program may refer participants to or enroll participants in occupational skills training programs and/or post-secondary education while they are receiving in program services (not available as a follow-up service or payment), including:

Entrepreneurial Skills Training

(WIOA Youth Element 12)

Training that provides the basics of starting and operating a small business. These trainings should develop the skills associated with entrepreneurship. Such skills may include, but are not limited to, the ability to:

- Creatively seek out and identify business opportunities.
- Develop business budgets and forecast resource needs.
- Understand various options for acquiring capital and the trade-offs associated with each option.
- Communicate effectively and market oneself and one's ideas.

Occupational Skills Training

(WIOA Youth Element 4)

(Training Service)

An organized program of study that provides specific vocational skills that lead to proficiency in performing actual tasks and technical functions required by certain occupational fields at entry, intermediate or advanced levels. Such training should:

- Be outcome-oriented and focused on an occupational goal specified in the Individual Career Plan.
- Be of sufficient duration to impart the skills needed to meet the occupational goal.
- Lead to the attainment of a recognized post-secondary credential.
- May include workforce preparation, vocational ESL and ABE in conjunction with training.
- May include prerequisite courses, including developmental remedial courses required to enter a training program.

Occupational Skills Training does not include workforce preparation activities (previously called short-term vocational training).

Post-Secondary Education

(Education Service)

Post-Secondary Education is participation in an educational pathway beyond secondary education, including two-year college, four-year College and qualified apprenticeship programs.

Prerequisite Training
(Training service)
Any class or training that is required by the training provider prior to enrolling into a training program. The training program must indicate the prerequisite course is required for entry into the training program.

Tuition Payments
Tuition payments can be made in two ways for an enrolled NextGen participant to support occupational skills training or instruction in a post-secondary education program:

Individual Training Account (ITA)
A financial obligation by the WorkSource Portland Metro Centers to support classroom-based training or instruction in a program that is on the Eligible Training Provider List (ETPL). ITAs may include the costs of tuition, related course fees (school, lab, etc.), and books required for the training program. Refer to WSPM Regional Program Standards for more information.

> **Note:** WIOA Youth funds *may not be used* to pay for ITAs for NextGen participants who are designated as ISY in their NextGen enrollment.

Procurement
To pay for occupational skills training or instruction in a post-secondary education program outside of an ITA, service providers must make the purchase following their agency procurement policy. These trainings do not have to be on the ETPL.

Tuition Payment Required Documentation
An ITA must include all required documentation outlined in WSPM Regional Program Standards.

If tuition is directly purchased following the provider's procurement policy, the detailed invoice from the training provider which is equal to or greater than the tuition payment amount is required to be in file.

Eligible Training Provider List
The statewide roster of training programs and providers specifically certified to meet the requirements of WIOA. The Local Workforce Development Board establishes an ETPL that is a subset of the state's ETPL and lists training programs directly linked to in-demand occupations in the local area that provide a career path leading toward self-sufficiency. Refer to WSPM Regional Program Standards for more information.

Financial Literacy Education
(WIOA Youth Element 11)

Activities which support the ability of participants to create budgets, initiate checking and savings accounts at financial institutions and make informed financial decisions. Financial literacy education assists participants in learning how to effectively manage spending, credit and debt, including student loans, consumer credit and credit cards. Activities also include educating participants on identity theft and ways to protect themselves.

Lesson topics must include Banking Basics, Income & Employment, Budgeting, Consumer Skills, Credit & Debt, Financing Higher Education, and Insurance. It is recommended that each lesson must take between 25-35 minutes to complete.

Everfi is the recommended program of study. Other Financial Literacy Education tools are permissible at service provider discretion if they fulfill all listed lesson topics and engage the learner for the required amount of time.

Individual Career Plan

The Individual Career Plan identifies career pathways that include education and employment goals, appropriate achievement objectives and appropriate services for the participant, considering the results of the Objective Assessment. The initial plan must be completed prior to the participant's Registration date. The plan documents short- and long-term education and employment goals and identifies which WIOA Youth Elements are to be provided.

Prior to plan development, a variety of assessments must be conducted to provide critical information about the participant's career goals, interests, aptitudes, basic academic skill level, occupational skills, work history, work and college readiness, attributes, personal strengths, developmental needs, and support service needs. The analysis and application of this assessment information is critical to guiding and coaching the participant and assisting them to develop a realistic plan to reach their career goals.

The plan is a dynamic document that will change as the participant is provided opportunities to explore optional careers of interest, through meetings in which the participant receives advice and guidance and through a variety of work and community-based experiences exploring a range of occupational areas. The plan must be developed as a professional collaboration between the participant and Career Coach with a case note documenting that the plan was developed in partnership with the participant and mutually agreed upon by the participant.

During In-Program services, the plan should be reviewed and updated every 180 days as the participant completes (or is unable to complete) activities as planned and should drive program participation. Each plan update is entered in I-Trac as an *Individual Career Plan Development & Review* service with an attached case note documenting what updates were made and that the plan update was in partnership with the participant and mutually agreed upon by the participant.

Integrated Learning
(WIOA Youth Element 5)

Integrated learning is concurrent education and workforce preparation in specific occupations. Workforce preparation activities, basic academic skills, and hands on occupational skills training are to be taught with in the same time frame and connected to training in a specific occupation, occupational cluster or career pathway.

Job Search Assistance

Coaching to or teaching strategies which can be used to increase job search effectiveness. Assistance may include a variety of strategies for conducting on-line job searches, networking, and the role of resumes, cover letters, and interviews in a successful job search. Service can be provided one-on-one or in a group setting.

Labor Market Information
(WIOA Youth Element 13)

Services that provide labor market information about in-demand industry or occupations available in the local area such as career awareness, career counseling and career exploration services. See Career Coaching.

Leadership Development
(WIOA Youth Element 6)

Services that provide opportunities that encourage responsibility and other positive social and civic behaviors, which may include (but are not limited to) activities such as community service and peer-centered leadership activities.

Mental Health/Drug and Alcohol Counseling
(WIOA Youth Element 10)

Individualized counseling to participants by trained professionals, including drug and alcohol abuse counseling and mental health counseling. When these types of counseling services are provided through partner programs the service providers must coordinate with the referral agency to assure continuity of service.

Narrative Case Notes
Narrative case notes are not a service, but may be completed in I-Trac to document additional detail around participation activities; successes and challenges; progress towards Individual Career Plan goals; and skill gains, credential, employment or post-secondary outcomes. Narrative case notes entered should not repeat information already entered in the I-Trac system, but expand upon, provide context to or augment service or employment data. A case note is to be completed to document when a participant cannot be located or contacted.

Objective Assessment
The Objective Assessment is a review of skill levels and/or service needs of a participant, which must include:

- Basic academic skills
- Occupational skills
- Prior work experience
- Employability
- Career interests and aptitudes (including interests and aptitudes for nontraditional jobs)
- College and career readiness
- Personal strengths and challenges
- Support service needs
- Developmental needs
- Life skills

The results of these assessments are applied to the development of an ongoing Individual Career Plan that specifies the sequence of steps and activities the participant will engage in as they progress through program services that will lead to the achievement of their development, education and, ultimately, employment goals.

Basic academic skill assessment may include a standardized test to determine the grade level at which a participant computes or solves math problems, reads, writes, or speaks English. Tests determine participants' ability in each category. To assess basic skills with a test, assessment instruments that are valid and appropriate for the target population must be used. Reasonable accommodations are to be provided for individuals with disabilities. The Objective Assessment must be completed prior to the participant's Registration date.

Outreach and Recruitment

Activities designed to inform potentially eligible participants about the availability of education and training services, including NextGen services. Appropriate activities may include information sessions – both at the program site and at partner sites – and targeted recruitment through partner organizations, schools or agencies. Interested participants then receive an objective assessment to determine their fit with program services and expectations.

Post-Secondary Preparation and Transition Activities
(WIOA Youth Element 14)

Activities that help participants prepare for and transition to postsecondary education and training. Activities and services prepare participants for advancement to postsecondary education after attaining a high school diploma or its recognized equivalent. These services include exploring postsecondary education options including technical training schools, community colleges, four-year colleges and universities, and registered apprenticeship.

Additional services include, but are not limited to, assisting participants to prepare for SAT/ACT testing; assisting with college admission applications; searching and applying for scholarships and grants; filling out the proper Financial Aid applications and adhering to changing guidelines; and connecting participants to postsecondary education programs.

Secondary Education and Skills
(Education Service)

Programs that provide instruction at or above the 9th grade level leading to a high school diploma and/or a General Equivalency Degree (GED).

Alternative Secondary Instruction
(WIOA Youth Element 2)

Structured programs that serve participants who have not been successful in mainstream "traditional" academic programs and provides credit recovery, drop out recovery services, basic skills remediation, individualized academic instruction, and English as a Second Language training. Instruction leads to a High School Diploma or GED.

GED Instruction

Instruction is delivered in a structured classroom setting and designed to systematically address basic skills deficiencies and/or lead to passage of GED tests which, when passed, certify that the taker has high school-level academic skills. Classes may be self-paced with individualized instruction. Individualized electronic instruction though computer-based systems may be a delivery system but must include regular access to and assistance from instructors. Participant progress is monitored and measured via testing.

High School Diploma Instruction

Structured, formal curriculum approved and required by a public-school district in accordance with Oregon Administrative Rules that leads to the award of a High School Diploma.

Tutoring
(WIOA Youth Element 1)

Services that focus on providing academic support, helping a participant identify areas of academic concern, assisting in overcoming learning obstacles, and providing tools and resources to develop learning strategies. Strategies include tutoring, study skills training, literacy development, active learning experiences, after school opportunities, and individualized instruction. Tutoring leads to a High School Diploma or GED.

Work Experience
(WIOA Youth Element 3)

The three categories of WIOA youth Work Experience (WEX) are: Summer and Year-Round temporary employment opportunities, Job Shadowing and Pre-Apprenticeship programs.

Summer and Year-Round Temporary Employment Opportunities
A planned, structured, short-term learning/training experience that takes place in an employer's workplace and involves work that is defined by a written, signed training agreement with the employer. The agreement outlines the expectations and responsibilities of all parties and specifies learning objectives and criteria for demonstrating learning and skills gained. A WEX may be paid or unpaid.

A WEX must include academic and occupational education, which refers to contextual learning that accompanies the WEX and includes the information necessary to understand and work in specific industries and/or occupations.

WEX activities can be developed, managed and paid either through service provider leveraged grants and employer relationships or through the central WEX contractor.

Work Experience Continuum
A participant's college and career readiness should inform the appropriate work experience placement. A referral and application are required to enter a WEX placement. The appropriate WEX placement is determined by utilizing the College and Career Readiness Competency Matrix as follows:

- **WEX-1 Employment Training Opportunity –** A fully subsidized, short-term, work experience of 60 – 120 hours. To qualify for a WEX-1, participants must demonstrate basic work-readiness skills. Participants at this level may need additional support and supervision as they continue to develop the skills needed to obtain entry-level employment. A WEX-1 experience is highly supervised and structured with organizations where participants development is part of their mission (e.g. work crews and social-purpose enterprises).

- **WEX-2 Entry-Level Internship –** A short-term WEX of 160 hours. To qualify for a WEX-2, participants must demonstrate work-readiness skills commensurate with an entry-level position. A WEX-2 experience generally involves more independence and self-direction to assigned tasks. The intent of a WEX-2 experience is to further develop work-readiness skills, build an employment history, secure employer references, and explore different industry sectors/workplace settings.

- **WEX-3 Temp-to-Hire –** A flexible WEX in which a designated agency acts as employer-of-record and places a participant on a "trial basis" in a position with potential for hire. Participants at this level have successfully completed a WEX and shown they have the skills and work ethic to succeed on the job.

- **WEX-4 Career-Pathway Internship –** A flexible arrangement aimed at participants in post-secondary education or training to get experience in their chosen career field. To qualify, a participant must demonstrate general work-readiness and have a basic understanding of the technical skills of the position – usually evidenced by specific occupational-skills training or related college coursework.

- **Service Coordinator WEX (SC-WEX) –** A short-term WEX subsidized directly by the service provider not using any Worksystems funding. An SC-WEX can be classified as any of the WEX levels defined above. Service provider pays the direct wages to the participant and is responsible for supervision of the participant in the WEX, training agreements and supervisor evaluations.

Job Shadowing

Job shadowing is a work experience option where participants learn about a job by walking through the workday as a shadow to a competent worker. The job shadow work experience is a temporary, unpaid exposure to the workplace in an occupational area of interest to the participant. Participants witness firsthand the work environment, employability and occupational skills in practice, the value of professional training and potential career options.

Pre-Apprenticeship Program

A program or set of strategies designed to prepare individuals to enter and succeed in a Registered Apprenticeship program. The pre-apprenticeship course must have a documented partnership with one or more Registered Apprenticeship programs that assist in placing individuals who complete the course in a Registered Apprenticeship.

Work Readiness Training

A targeted course of instruction in workplace skills required by employers and needed for participants to be hired. Work readiness training is short-duration and focused on College and Career Readiness Level 3 competencies. *New World of Work 21st Century Skills* is the recommended program of study. Other tools are permissible at service provider discretion if they fulfill all listed lesson topics.

New World of Work 21st Century Skills focuses on the attributes of adaptability, analysis/solution mindset, collaboration, communication, digital fluency, empathy, entrepreneurial mindset, resilience, self-awareness and social/diversity awareness. Service providers may enhance instruction in work readiness training with additional activities and may adapt parts of this curriculum to meet specialized needs of their participants. Additional components of work readiness training also must include 21st Century job search methods including on-line applications, resume writing, pre-employment testing and interview skills. A participant must complete a resume as a part of this training.

Follow-Up Services

(WIOA Youth Element 9)

Follow-Up services are provided upon a participant's completion of In-Program services and are intended to help ensure the participant is successful in employment and/ or postsecondary education and training. All participants must be offered an opportunity to receive Follow-Up services that align with their individual service strategies. Furthermore, Follow-Up services must be provided to all participants for a minimum of 12 months unless the participant declines to receive Follow-Up services, or the participant cannot be located or contacted. A case note is entered in I-Trac to document if a participant opts out of Follow-Up services or cannot be located or contacted.

If a participant comes back in contact, appropriate Follow-Up services must be provided up to their original 12-month date. If at any point in time during the program or during the 12 months following Exit to Follow-Up a participant requests to opt out of Follow-Up services, they may do so. This request to opt out must be documented in a case note.

Follow-up services are limited to:

- Support services.
- Adult mentoring.
- Financial literacy education.
- Career Coaching.
- Job Search Assistance.
- Activities that help participants prepare for and transition to postsecondary education and training.

WIOA funded training and work experiences or other Worksystems, WorkSource or grant funded services or training cannot be provided to participants in Follow-Up. The types of Follow-Up services provided, and the duration, must be determined based on the needs of the participant; therefore, the type and intensity of services may differ for each participant. Contact attempted or made for the sole purpose of securing documentation for performance reporting is not Follow-Up and is not to be counted and entered in I-Trac as a Follow-Up service.

Regional Program Standards

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Definitions Addendum				
Activity	**Education Service[1]**	**Extend Participation[2]**	**Follow-Up[3]**	**I-Trac Tab/Control**
Adult Mentoring	No	Yes	Yes	Services/Services
				Follow-up/Follow-up Services
Career Coaching	No	Yes	Yes	Services/Services
				Follow-up/Follow-up Services
Career Exploration	No	Yes	No	Services/Services
Career Mapping Workshop	No	Yes	No	Services/Services
Career Related Learning Experience (CRLE)	No	Yes	No	Services/Services
Education and Training Services				
Entrepreneurial Skills Training	No	Yes	No	Services/Training, Post-Secondary and Employment Skills
Occupational Skills Training	Yes	Yes	No	Services/Training, Post-Secondary and Employment Skills
Post-Secondary Education	Yes	Yes	No	Services/Training, Post-Secondary and Employment Skills
Prerequisite Training	Yes	Yes	No	Services/Training, Post-Secondary and Employment Skills
Financial Literacy Education	No	Yes	Yes	Services/Services
				Follow-up/Follow-up Services
Individual Career Plan	No	Yes	No	Services/Services
Job Search Assistance	No	Yes	Yes	Services/Services
				Follow-up/Follow-up Services
Leadership Development	No	Yes	No	Services/Services
Mental Health/Drug and Alcohol Counseling	No	Yes	No	Services/Services
Post-Secondary Preparation and Transition Activities	No	Yes	Yes	Services/Services
				Follow-up/Follow-up Services
Secondary Education and Skills				
Alternative Secondary Education	Yes	Yes	No	Services/Services
GED Instruction	Yes	Yes	No	Services/Services
H.S. Diploma Instruction	Yes	Yes	No	Services/Services
Tutoring	Yes	Yes	No	Services/Services
Work Experience (WEX)				
WEX-Y – WEX 1	No	Yes	No	WEX/WEX Match
WEX-Y – WEX 2	No	Yes	No	WEX/WEX Match
WEX-Y – WEX 3	No	Yes	No	WEX/WEX Match
WEX-Y – WEX 4	No	Yes	No	WEX/WEX Match

[1] Education services impact DOL performance measures for WIOA participants.

[2] Service resets the 90-day clock during In-Program services.

[3] All Follow-Up services are tracked on the Follow-Up tab in the noted control; Assessments, Payments and Credentials are tracked the same regardless of whether provided In-Program or during Follow-Up.

Definitions Addendum				
Activity	**Education Service[1]**	**Extend Participation[2]**	**Follow-Up[3]**	**I-Trac Tab/Control**
SC – WEX 1	No	Yes	No	Services/Services
Pre-Apprenticeship Programs	No	Yes	No	Services/Work Based Training
Job Shadow	No	Yes	No	Services/Work Based Training
Work Readiness Training	No	Yes	No	Services/Services

Support Services

Overview

Support services are financial assistance to offset expenses necessary for a participant to engage in NextGen services. Support services are considered payments and do not extend program participation during In-Program services; therefore, every In-Program support service should be delivered with an appropriate staff service on the same day (e.g. Career Coaching).

Prior to considering support service payments, efforts must be made to identify resources in the community or from other grant resources that may provide the same support and use those available resources first. Each NextGen service provider must have processes in place for appropriate referrals to such services as Supplemental Nutrition Assistance Program (SNAP), community-based social services and housing agencies. Staff is responsible for assisting participant exploration of resources from community sources and/or within the participant's personal support system. When other resources are not available, and based on individual assessment and availability of funds, support services may be provided through NextGen services.

Prerequisites

Participants who seek support services must complete the following prerequisite activities:

- Enrollment in the NextGen system (including all required co-enrollments).
- Completion of an Individual Career Plan.
- Completion of Prosperity Planner budget saved to I-Trac record that supports need.

Prerequisite Exception

There are two exceptions to completion of some or all the prerequisite activities:

Identification Documentation – Welcome Process

When a participant does not have identification documentation to complete the Welcome process and where a fee is associated with securing the required identification documentation, a Support Service payment may be made to assist a participant in securing the required identification document if the participant has no other available resources. If determined necessary, a bus ticket may also be provided to assist a participant with transportation needs associated with securing the documentation for Welcome completion.

> **Note:** The only identification types _**not covered by this exception**_ are securing a driver's license/permit or passport – all other types of date of birth validation/identification on the WSO Customer Registration list may be paid for with support services, providing the participant has no other resources available. Staff must also ensure the customer has completed the WorkSource Oregon Customer Registration and review the record to ensure that the customer is WIOA eligible.

Bus Tickets

Bus ticket assistance may be provided to enrolled participants to get to and from the NextGen provider location or an employment interview without the requirement of a completed Prosperity Planner budget. However, the NextGen enrollment and documentation must be completed.

Administrative Requirements

Documentation

All support services are to be tracked in the participant's I-Trac record on the Payments Tab in the support services control. When a Support Service is paid directly to the participant a signature that acknowledges receipt of the support payment must be on file with the back-up payment documentation noted below in Support Service Definitions – direct deposit into an account in the participant's name and the endorsement on a cancelled check are allowable documentation of this requirement. Direct Deposit information must be received directly from the participant with approval to deposit support service payments to the account.

When a gift card (including a gas card) is provided as the support payment, receipts for the total amount of the gift card that reflect the purchase of allowable and approved items is required with the fiscal documentation file.

Documentation of Support Service payments is maintained in the financial records attached to the payment record.

Administrative

Each service provider must establish a written process to ensure proper fiscal procedures are followed, including paying from original invoices or childcare logs, securing original receipts, and appropriate participant acknowledgment of direct payments made to reimburse participants.

Each service provider must establish and follow a process for reconciling pre-purchased support services (i.e., bus passes, pre-paid gas cards, retail store vouchers, gift cards, etc.). This reconciliation must occur at least quarterly (monthly preferred), with the documentation maintained on-site and made available during Worksystems or funder monitoring, as requested.

Support service payments/reimbursement must be made from funds during the program year in which they were incurred. A support service payment does not extend participation.

Definitions

NextGen service providers may provide the following types of support service. If the support is not defined below it is not allowable for payment under this policy, either due to local area restrictions or because the support is not allowable by funding source(s).

> **Note:** Service provider contracts may have a variety of funding sources. It is important to check and ensure that the support expenses being covered are allowable to the selected funding source. It is noted below that WIOA funding cannot pay for late fees and interest charges. But there may be other restrictions on funding that are important to understand.

Auto or Bicycle Repair

Funds may pay for repair and replacement of essential parts and safety equipment to an automobile or bicycle only if it can be verified there is no other reasonable way for the participant to transport himself/ herself to a training or work site. For Auto Repair, the vehicle must be titled and registered in the participant's name, be

properly insured and there must be written verification by a reputable certified mechanic that the repairs are needed.

> *Required Documentation*: Original invoices/receipts are required for car and bike repair payments. Quotes or work orders will not be accepted for payment receipts. Auto Repair payment must be made to the invoicing certified mechanic and a copy of the auto registration, documentation of a valid driver's license, and proof of insurance card must be included with the payment record and verified to be the same vehicle on which repairs were made.

Auto Insurance

Support Service payment may be provided for auto insurance coverage required by the State of Oregon or Washington and can only be justified in a situation where, without the insurance, the participant would not be able to travel to the training site and/or place of employment. The vehicle must be titled and registered in the participant's name and the participant must have a valid driver's license in their state of residence.

> *Required Documentation*: The original insurance billing with payment directly to the insurance company is required. In addition, documentation of a valid driver's license, a copy of the auto registration, and proof of insurance card is to be included with the payment record.

Auto Registration

Costs associated with DEQ test fees, title transfer and/or registration or renewal may be paid to allow participants to register their auto for the purposes of completing training or securing and/or maintaining employment. Note that the Oregon Department of Motor Vehicles may require a valid driver's license and proof of auto insurance attached to the vehicle.

> *Required Documentation*: The original registration/transfer/test receipt(s) and a photocopy of the new title and/or registration in participant's name must be collected and maintained in the Support Service financial file.

Books and Fees

Costs associated with required books, school supplies and fees for participants enrolled and officially registered in post-secondary education or training, including testing fees, or books and fees required for occupational skill training.

> *Required Documentation*: The original store receipt, school record or test receipt (for fees) that reflects an itemization of the purchased items.

Child and Dependent Care

Childcare costs are for a child(ren) under age 11 during the time the participant is engaged in program services — including travel to and from the service delivery site. Due to the high cost and limited resources this support should only be considered on a case-by-case basis.

A spouse, sibling, or other family member residing within the same household may not be paid with Support Service funds to provide childcare for the participant's children. Costs for care of an individual over age 11 may only be paid if there is a documented disability stating the individual may not be left alone.

Required Documentation: A care log (completed by the participant and signed by the care provider verifying dates, times and cost) is to be used to track the costs being reimbursed. The log must be retained in the financial documentation for the payment.

Clothing/Personal Care

Clothing and/or related footwear or incidentals for interview (including grooming and hygiene products), work or training. This may include such items as a uniform/safety attire, or a type of work shoe or protective eye wear required for the job by an employer (and not provided by the employer) or required of trainees by the training provider. Utilize community resources for interview attire whenever possible.

Required Documentation: The original store or merchant receipt that reflects an itemization of the purchased items.

Laptop Computer

Purchase of a basic laptop computer when needed to participate in program services, engage in training or secure and/or maintain employment (when not provided by the employer or training provider). Up to $500 may be used for the purchase; exceptions to this limit may be considered when circumstances support. Service provider manager approval is required for exceptions.

Required Documentation: The original store or merchant receipt that reflects an itemization of the purchased items.

Drivers Education Training

Funds may pay the cost for a driver's education course through an ODOT-approved provider (https://www.whydrivewithed.com/find-a-provider/) to learn to drive and be able to secure an Oregon Driver's License in order to complete training, job search, and/or maintain employment.

Required Documentation: Verification that the provider is ODOT-approved, and original invoice for the published fee/rate. Payment must be made to the training provider. Evidence of training outcomes must be collected and maintained in the participant file and maintained with the Support Service documentation. This may be in the form of an email from the training provider confirming outcomes or a copy of the training provider's certificate of completion in the participant's name.

Employment Documentation

Payment of fees required to secure or replace documentation required to complete an I-9 with an employer to secure employment.

Required Documentation: Receipts that itemize the fees necessary to obtain the approved document with staff attestation (notation and signature on receipt copy is sufficient) that the identification documentation was secured.

Housing Assistance

Payments for services or items necessary to move into stable housing. Examples include but may not be limited to: Application and move-in fees, security deposits, motel vouchers for temporary housing, fees for access to Community Warehouse, household items, U-Haul or similar truck or van rental to move furniture. Whenever possible, community resources such as Goodwill and Community Warehouse should be utilized.

Required Documentation: Direct payment from an invoice to landlord/rental company or itemized receipt from the store or merchant where the purchase was made.

Housing Stability Education

Grant funds may be used to pay the costs associated with community housing stability education services that will contribute to the participants' work readiness through stabilized housing.

> _Required Documentation_: An invoice from the community service provider is required with documentation of the participants' attendance.

Legal Services

When necessary to assist a participant in expunging a criminal record or to maintain legal to work documentation to secure employment or participate in a training. Documentation that community resources (Legal Aid, etc.) were reviewed and considered before approving support service payment is required.

> _Required Documentation_: Itemized invoice that clearly details the services provided and the published rate for the service. Payment must be made to the vendor.

Medical/Dental/Optical

This Includes medical/dental/optical testing/treatment, prescriptions, mental health testing, counseling. Funds may only be used for co-payments and expenses of the participant and cannot be used for costs of family members. Due to the high cost and limited resources, efforts should be made to first utilize Oregon Health Plan, County health care resources, and/or sliding scale fee structures with providers. Note: WIOA funds cannot be used for drug-use testing.

This service should be limited to the minimum required to permit the person to participate in training, job search, accept employment, or maintain employment. All reasonable alternatives should be researched by the participant, including lower cost providers, such as Oregon Health Plan, County Health Department, Care Oregon, etc.

> _Required Documentation_: Co-payments may be reimbursed to the participant and require a receipt from the health care/service provider showing date and amount of payment. All other payments must be made directly to the health care/service provider based on an original detailed invoice (no statements)

Needs Related Payments

NextGen program Needs Related Payments provide financial assistance to participants while they are engaged in any of the 14 WIOA program elements excluding Career Coaching and Mental Health and Drug and Alcohol Counseling. Refer to Service Design and Definitions – WIOA Program Elements above. Payments are limited to $245 per participant per week. Providers must include their plan for Needs Related Payments in their Support Services Policy which must be submitted to Worksystems for approval. Direct deposit to the participant's bank account is the preferred payment method; payment by check is allowable. Needs Related Payments have been determined to be non-taxable; therefore, issuance of a 1099 is not required.

Required Documentation: Service provider staff must provide evidence of engagement in the allowable activities through timesheets documenting verification of attendance during the week (with time and dates noted). Timesheet to be maintained with payment documentation.

Parking

When necessary, to enable the participant to engage in career services or training activities (e.g. college campus parking fees).

Required Documentation: Original receipts that reflect a location and time in line with approved service provision (i.e. a class schedule).

Professional Test/License/Organization Fees

When membership, professional event registration and/or licenses/certifications/test/test preparation fees are required or necessary to ensure a participant is prepared for employment or provides increased access to employment opportunities in the associated sector. Support may include the cost for professional licenses (including a state-issued driver's license when required for the job); certifications; test fees and/or test preparation materials, including GED; business, technical and professional organization fees; professional event registration fees, etc.

Required Documentation: Original receipt(s).

Relocation

When a participant accepts a job offer at a location out of Multnomah or Washington County and more than 50 miles away, grant funds may be used to share in the cost of moving to that location (e.g., U-Haul costs, etc.).

Required Documentation: A written, bona fide job offer must be documented to qualify for relocation support. Original receipt(s) of all approved relocation expenses must be maintained with the payment record.

Rent Assistance

Grant funds may be used to assist with rent payments (current and arrears, including rent for mobile home space) that will contribute to the participants' work readiness. WIOA funds may not be used to pay interest charges or late fees associated with past-due rent expense.

To be considered for a support service payment, staff must determine that the situation would impede the participant's ability to conduct an efficient job search, maintain employment or participate in training without the rent assistance, and that the participant has a plan for future payments.

Where community rent assistance resources are available and the participant eligible, those resources must be used before support service payments can be utilized. Documentation that the participant is not eligible for community resources must be included with the support service payment record.

Mortgage or other payments that contribute to the purchase of real property that the participant owns are not allowed (e.g., house, condominium, car, boat, etc.).

Required Documentation: Clear verification (copy of rental agreement, voucher or detailed receipt) of charges due and participant residency is required; the address on the lease must match the participant I-Trac record if the participant is not named on the lease agreement. Payment must be made to the leaseholder/owner.

Tools

When participants are required to purchase their own tools for employment or training, this cost may be covered by support service payments. Examples include mechanic, shop, electrician tools, etc.

Tools or equipment that is supplied by the employer, e.g., desk computers, industrial equipment, stationary, machinery, safety equipment, etc., *may not* be paid with support services.

Required Documentation: Original itemized receipts that reflect the allowable and agreed upon item(s). In addition, for tool purchases for training, documentation from the training provider of the required items is to be maintained in the file. For employment, a bona fide, written job offer that shows the requirement of employees providing their own tools or equipment (must be specific) must be provided prior to the approval of funds.

Transportation

Includes all modes of transportation (e.g., public transportation passes or tickets, gas for a personal vehicle, car share service, Uber/Lyft/taxi service, bicycle/scooter share service) to help participants engage in services and activities that support training and education, job search and/or employment

Staff are required to determine that assistance provided is not duplicated, such as a bus pass for a month and gas purchase during the same month. Additionally, funds should not pay for the monthly cost of share vehicle services, but can reimburse for the month(s) that the participant uses the service for allowable activities. This should be managed through verification of attendance logs and communication with the participant documented in file.

Required Documentation: A log must be kept that tracks activities supported with transportation assistance. A signature on the log for bus passes, bus ticket packages (not individual tickets), and gas card distribution to participants that includes the participant's signature acknowledging receipt can be used as documentation. For other types of transportation, a detailed receipt showing date and time must support reimbursement payment and must align with activities noted in the log. A signed receipt for each instance of transportation support payment in the file can replace a log as long as the tie to services is noted. Receipts are required for gas cards and must show allowable and approved purchase (i.e. gasoline and not items from the mini mart).

Utilities

Utility assistance may be provided to assist a participant in stabilizing their living situation and to conduct an efficient job search, maintain employment or participate in training. This includes past due utility payments, utility deposits, internet and cell phone bills (but does not include any sort of television/cable expenses). Prepaid cell phone service may be paid for with Support Services funding. Up to $75 total may be spent on a phone set-up and then minute purchases may be made in line with program engagement.

The original bill must be provided before payment can be approved, with verification that the utilities/phone are for the participant's personal residence or in the participant's name (in the case of cell phones). WIOA funds may not be used to pay interest charges or late fees associated with past due utility expense.

> _**Required Documentation**_: Clear verification (copy of detailed utility invoice that matches participants address in I-Trac) of charges due. Payment must be made to the vendor.

Incentives

An incentive is a financially based reward to a participant for successful achievement of planned milestones in allowable education, training and/or work experience activities. These activities may include all types of work experience not funded by Worksystems, financial literacy and work readiness education, entrepreneurial training, post-secondary education, occupational skills training, a pre-apprenticeship education program or secondary education.

Attendance-based milestones are not allowed.

To award incentives, service providers must have a policy and corresponding procedures that define how Incentives will be considered and awarded. The policy and procedures must meet the requirements of this policy; individual award payments will be reviewed and monitored against the provider policy and procedures. Provider policy/procedures must include the forms of acceptable documentation to be used to validate milestone achievements for which Incentives will be paid.

The policy must be provided to and approved by Worksystems' Youth Services Manager prior to any Incentive awards being planned or paid. If the policy is revised after approval, the revised version must also be approved before being implemented.

Incentive Rules

- Activities and corresponding milestones and planned incentives must be outlined in writing in the participant's Individual Career Plan before the commencement of the activities.

- Planned Incentives must be tied to milestones specific to the training or work experience activities.

- Forms of Incentive payment must meet the cost rules contained in 2 CFR Part 200 (see Administrative Requirements below).

- To be eligible for a planned Incentive payment, participants must be determined eligible for and enrolled in NextGen.

Administrative Rules

Service providers must establish a written approval process for Incentives to ensure proper and consistent application of policy and that fiscal procedures are followed. At minimum, these procedures must address the following requirements:

- Service providers must establish and follow an Incentive award process to initiate the expenditure with required organizational signatures for review and payment authorization.

- Incentive awards are to be paid by check payable to the participant. Gift cards, gift certificates or retail vouchers cannot be awarded as Incentive payment.

- Participants are required to sign an acknowledgment of receipt of the Incentive. Check endorsement or direct deposit (see additional details in Support Services) may be used as the signed receipt.

- Incentive awards must be paid from funds during the program year in which the Incentive(s) milestone was achieved.

Regional Program Standards

- Planned Incentives are to be entered into I-Trac in the Payments Plan control prior to the commencement of the Incentive activity.

- Once the Incentive activity is completed and the payment awarded, the Incentive Payment is also entered in the Incentive Payment control on the Payments tab.

Performance

Service providers are responsible for meeting all program performance measures established by Worksystems and the DOL for WIOA Youth funded programs.

WIOA Performance Measures

Performance Element	Description	Performance Cohort	Reporting Cohort
Q2 After Exit Employment, Secondary or Post-Secondary Education or Training	**Denominator** All enrolled participants **Numerator** The number employed or in Secondary or Post-Secondary Education/Training during Q2 after Exit *Note:* Trainings that are funded by the NextGen program or WorkSource cannot be counted as a placement.	Q2 after Exit	Q4 after Exit
Q4 After Exit Employment, Secondary or Post-Secondary Education or Training	**Denominator** All enrolled participants **Numerator** The number employed or in Secondary or Post-Secondary Education/Training during Q4 after Exit *Note:* Trainings that are funded by the NextGen program or WorkSource cannot be counted as a placement.	Q4 after Exit	Q6 after Exit
Credential Attainment	**Denominator** All participants who are enrolled in a Secondary or Post-Secondary Education/Training service at Registration that leads to a DOL recognized Credential or engage in a Secondary or Post-Secondary Education/Training service during In-Program services that leads to a DOL recognized Credential **Numerator** The number than earn a Credential between Participation Date and 1 year after Exit date *Note*: A participant who attains a High School Diploma or GED can only be counted in the Numerator if they are employed or in a Post-Secondary Education/Training program that leads to a recognized Post-Secondary Credential any time after Exit.	1 Year after Exit	1 year after Exit

Performance Element	Description	Performance Cohort	Reporting Cohort
Measurable Skill Gains	**Denominator** All participants enrolled in a Secondary or Post-Secondary Education/Training service that leads to a DOL recognized Credential at any time during a program year (July 1-June 30) during In-Program services **Numerator** The number that has at least one type of measurable skill gain during the program year of enrollment in a Secondary or Post-Secondary/Training service regardless of Participation date Measurable Skill Gains include High School Diploma/GED; Educational Function Level Achievement; Secondary or Post-Secondary Achievement; Training Milestone; Skills Progression. See *Definitions for Measurable Skill Gains* below.	By June 30 of each program year a participant engages in a Training or Education Service	Program Year Q4

Additional NextGen Performance Measures

Performance Element	Description	Performance Cohort	Reporting Cohort
Assessed Work Ready	**Denominator** All participants that Exit. **Numerator** The number who are assessed at an Essential Workplace Skills score of Level 3 by the date of Exit to Follow-Up in the following domains: Adaptability, Collaboration, Communication, Problem Solving and Self-Awareness.	By Exit date	The quarter of Exit
Basic Skills Sufficient by Exit to Follow-Up	**Denominator** All participants that Exit. **Numerator** The number who are assessed at an academic score of Level 2 on the Essential Workplace skills assessment by the date of Exit to Follow-Up.	By Exit date	The quarter of Exit

Performance Element	Description	Performance Cohort	Reporting Cohort
Work Experience	Utilization of assigned slots for WEX and SummerWorks. **Denominator** Number of assigned slots **Numerator** Number of participants enrolled in a WEX	By June 30 of each program year	By June 30 of each program year
Data Points			
At Exit Employment or Post-Secondary/Training Placement	**Denominator** All participants that Exit **Numerator** The number that are employed or in Post-Secondary Education/Training at Exit	At Exit	At Exit
WSPM ITA Application	Number of ITA applications submitted to a WSPM Center. Number of ITA applications that are approved by a WSPM Center.	In– Program PY21	In Program PY21

Additional Performance Definitions

Education and Training Placement Verification

The confirmation from an education or training provider that the participant is placed in an education or training program during or within a period as defined by a grant, program or performance measure. Education and Training Placement verification requires the collection of the following data in the Education and Training Placement Information control on the Outcomes tab of I-Trac:

- Education or Training Start Date
- Placement Type
- Training Provider Name
- Planned Credential

For the staff/participant verification to be reported and used in performance tracking, the placement must also be confirmed in the Education and Training Confirmation control.

Employment Verification

The confirmation from a participant, an employer, or through a state record crossmatch that the participant is employed during or within a period as defined by a grant, program or performance measure. Employment verification requires the collection of the following data in the Employment Information control on the Outcomes tab of I-Trac:

- Employment Start Date
- Employment Type
- Employer Name
- Industry (NAICS)
- Position (ONET)

For the staff/participant verification to be reported and used in performance tracking, the employment must be confirmed in the Employment Confirmation control in I-Trac.

State UI wage match confirmations will automatically show in the Confirmation control when received from the State and may be used to verify employment without the detailed data described above.

Enrolled Participant
A customer who has completed the NextGen Eligibility and Registration process and has received one NextGen-funded service. For the service to count and trigger participation it must be data-entered into I-Trac.

Enrolled in Education or Training
Refer to the Program Services section of these Regional Program Standards for services designated as an Education or Training service.

Exit
A participant who has gone more than 90 days without an In-Program service. The Exit date is the date of the last In-Program service entered in I-Trac. After Exit, only Follow-Up services can be provided.

Full Program Exit
At the completion of one year of Follow-Up services a participant is automatically fully exited from the program, which means they are no longer eligible to receive services funded by the NextGen program without completing eligibility and re-enrolling in a new enrollment episode.

Global Exclusion Exit Reasons
Participants who find themselves in certain types of circumstances beyond their control and that preclude them from continuing participation in NextGen services may be manually exited from the program. These exit reasons must include documentation in the participant file in support of the early exit. When a Global Exclusion type of exit is recorded the participant will not be included in any of the performance measure denominators.

- *Reserve Forces/Called to Active Duty* – For more than 90 days.
- *Deceased.*
- *Foster Care*–The participant is in the foster care program [as defined by 45 CFR 1355.20(a)] and has moved from the area as part of the foster care program.
- *Health/Medical* – Exits program because of a medical treatment and that treatment is expected to last longer than 90 days.
- *Institutionalized* – Becomes incarcerated in a correctional institution or is a resident of an institution or facility providing 24-hour support such as a hospital or treatment center during the course of receiving services.

Documentation should support the exit reason and should not include any health or medical details which are protected by HIPAA. See I-Trac Data Entry and File Documentation below.

Credentials

Credentials are awarded by education institutions, training providers, licensing boards or industry associations in recognition of an individual's performance of measurable technical and/or occupational skills necessary to gain employment or advance within an occupation.

Technical or occupational skills are based on standards developed or endorsed by employers or industry associations; degree or diploma requirements are established or endorsed by the Oregon Department of Education. Training programs depicted on the State and Local ETPL note whether a credential is available upon successful completion of the training or subsequent certification testing.

Credentials recognize technology or industry/occupational skills for the specific industry/occupation rather than general skills related to safety and hygiene, even if such general skills certificates are broadly required to qualify for entry-level employment or advancement in employment. Therefore, certificates such as Forklift, OLCC, First Aid/CPR, BLS and OSHA 10/30 are not included in this definition. Certificates awarded in recognition of the attainment of only generic pre-employment or work readiness skills are also not included in this definition. The following credentials are tracked for reporting to funding agencies.

Credential	Additional Definition
High School Diploma	
GED or High School Equivalency Diploma	
Associates Degree	
Bachelor's Degree	
Post Graduate Degree	
Other Recognized Diploma, Degree or Certificate	To report in this category the Credential must be awarded from an accredited post-secondary institution. Example: Human Resource Management certificate from Portland State University.
Occupational Certification awarded by a certification body	A Credential awarded by a certification body based on an individual demonstrating through an examination process that they have acquired the designated knowledge, skills, and abilities to perform a specific job. The examination can be either written, oral, or performance based. Examples: Microsoft, Apprenticeship, Security Certifications, BankWork$, CareerWork$ Medical.
Occupational Skills License awarded by a government agency	A Credential awarded by a government agency that grants legal authority to do a specific job. Licenses are based on some combination of degree or certificate attainment, certifications, assessments, or work experience; are time-limited; and must be renewed periodically. Examples: A license from the Oregon State Board of Nursing to be a practicing RN, LPN, or CNA.

Credential	Additional Definition
Occupational Skills Certificate Awarded by an education institution	A Credential awarded by an <u>educational institution</u> based on completion of all requirements for a program of study, including coursework and test or other performance evaluations. Certificates are typically awarded for life (like a degree). Certificates of attendance or participation in a short-term training (e.g., 1 day) are not in the definitional scope for these certificates. Example: Career Pathways certificate.

Measurable Skills Gain

Gain Element	Description	File Documentation
Secondary Education Instruction		
High School Diploma/Equivalent/GED	As evidenced by documentation of attainment of a High School Diploma, Equivalent or GED.	Copy of the Credential
Educational Function Level (EFL) Achievement	As evidenced by one or more EFL gain on an accepted pre/post assessment.	Copy of the DOL approved assessment delivered during the program year which depicts the EFL gain from the previous assessment.
Secondary Education Achievement	Secondary Achievement (specific to participants attending high school) is measured by a transcript that shows the participant is meeting the State's academic standard for the school's academic period: • Quarter – 1.5+ credits • Trimester – 2.0+ credits • Semester – 3.0+ credits	Copy of the Transcript which shows credits awarded during the measurement period.
Post-Secondary Education Instruction		
Post-Secondary Education Achievement	Post-Secondary Achievement is measured by a transcript that shows credit hours awarded for the period based on FT or PT student status: • If FT, 12 credit hours awarded in one semester or term. • If PT, 12 credit hours awarded in two semesters or terms during a 12-month period.	Copy of the Transcript which shows credits awarded during the measurement period.

Gain Element	Description	File Documentation
Training Milestone	Evidenced by satisfactory or better progress report toward established milestones from an employer or training provider who is providing training. Examples: Completion of On-the-Job Training plan; completion of one year of a Registered Apprenticeship program; completion of a term in a Career Pathways or Occupational Skills Training program.	Copy of employer or training progress report.
Skills Progression	Evidenced by the completion of an occupational exam or by meeting occupational benchmarks in a trade for which the participant is receiving training. Example: DOL recognized Credential.	Copy of Credential

Procedures for Quarterly Reporting

This guidance is provided to help assure performance data is reported accurately and timely and will meet local, State and Federal monitoring requirements.

Service Engagement	Establish a process to review I-Trac management reports *Services by Start Date* and *Services by End Date* regularly – at minimum quarterly reviews to ensure that participants' engagement in services is being appropriately documented in I-Trac and in the participant file, including service dates and status.
Participant Employment and Education Information	Ensure all Employment and Education or Training placement information is documented in the participant's file and entered into I-Trac within 5 business days of receiving the information, including *At Exit* and *Q2* and *Q4* Confirmations. Case note if a participant is not able to be contacted for quarterly confirmations. If supplemental data is required to determine performance, only data that has a Confirmation in I-Trac will be reported to support performance.
File Documentation	Ensure that participant files always contain the approved documentation as outlined within these Regional Program Standards to avoid monitoring findings and the removal of performance gains. Establish a process to regularly review file documentation.
Performance Management	Establish a process to review I-Trac management reports *Performance* quarterly to ensure that denominator and numerator cohorts are accurate. Data is to be entered within 5 business days of receiving the information.

I-Trac Data Entry and File Documentation

Performance Element	I-Trac Data Entry Fields	File Documentation
Q2 and Q4 After Exit Employment, or Post-Secondary Education / Training	Outcome Tab • Employment or Education Placement and Confirmation Controls • Confirmation type of Q2 and Q4 After Exit	I-Trac Employment Information and Confirmation or Education & Training Placement and Confirmation records. Enter a case note if a participant is unable to be contacted.
Credential Attainment	Services Tab • Secondary Education & Skills Control or Training, Post-Secondary Education & Employment Skills Control Outcome Tab • Credentials Control	Copy of Credential.
Measurable Skill Gains	Assessment Tab • Measurable Skills Gains Control	See above *Definitions for Measurable Skill Gains.*

Performance Element	I-Trac Data Entry Fields	File Documentation
Assessed Work Ready	Assessment Tab • College& Career Readiness Assessment Control, Exit Assessment	Copy of Essential Workplace Skills Exit Assessment.
Basic Skills Sufficient by Exit to Follow-Up	Assessment Tab • College& Career Readiness Assessment Control, Exit Assessment	Copy of Essential Workplace Skills Evaluation Exit Assessment and basic skills assessment
At Exit employment or Post-Secondary/Training placement	Outcome Tab • Employment and/or Education & Training Placement and Confirmation Control • Confirmation type At Exit	I-Trac Employment Information and Confirmation or Education & Training Placement and Confirmation records. Enter a case note if a participant is unable to be contacted.
Global Exclusion Exit Reasons	Outcome Tab • Program Status Control	*Reserve Forces:* Case note that includes the name and title of the military representative that verified the call or a copy of the military orders. *Deceased:* Copy of the death certificate or copy of the obituary or newspaper article. *Foster Care:* Case note that includes the name and contact information of the case worker or foster parent providing the information documenting the move out of the service area *Health/Medical*: Case note that includes the name and contact information of the family member or agency staff person providing the exclusion information (do not put specific medical diagnoses or specific medical information into either the file or the I-Trac record) *Institutionalized:* Copy of public information verifying the incarceration, or a case note that includes the name and contact information for the family member or agency staff person providing the exclusion information