WORKSOURCE PORTLAND METRO

Regional Program Standards

Focus:	☐ **WorkSource Centers** ☐ **Other:**	☒ **Youth Program Services**
Topic: PDX Youth@Work		
Date: January 3, 2023	☒ **New** ☐ **Revised**	

Overview

Worksystems manages subsidized work experience and stipend learning opportunities for young people ages 16 to 24 through a suite of programs known as PDX Youth@Work. These programs provide opportunities for career exposure, job readiness and workplace skills practice, professional development and paid work experience and learning opportunities. The service focus is young people facing barriers to employment, which include but are not limited to: Disability, justice system involvement, immigrant/refugee status, houselessness or engagement with the foster care system.

- Learning opportunities prepare participants for success in the workforce by providing academic and career-related learning opportunities. Learning opportunities are hosted by providers that serve young people in our community and are designed to promote the professional growth and development of participants through practical and hands-on tasks, projects and applications. Stipends are earned for participation in education and training activities within the learning opportunity.
- Year-round work experiences provide subsidized work experiences to young people from October through May. Participating work sites provide a structured working and learning environment, and career coaching contractors provide job coaching and workplace support services.
- SummerWorks is a summer jobs program providing subsidized work experience and stipend learning opportunities to young people who are motivated to work but lack credentials, experience or networks to find meaningful summer employment on their own. SummerWorks operates from June to September.

Contents

Overview 1
Contents 1
Eligibility and Enrollment Requirements 3
Eligibility 3
Enrollment 3
Service Design 3
Service Definitions 4
Career Labs 4
Financial Literacy 5
Learning Opportunity 5
Administrative Rules 6
Orientation 6
Work Experience 6
Administrative Rules 6
Terminating Work Experiences 7

Support Services **7**
Overview 7
Prerequisites 7
Administrative Requirements 8
Documentation 8
Administrative 8
Support Service Definitions 8
Clothing/Personal Care 8
Employment Documentation 9
Laptop Computer 9
Parking 9
Professional Test/License/Organization Fees 9
Tools 9
Transportation 10
Utilities 10

Stipend Payments **11**
Administrative Rules 11

Performance **12**
Worksite Development Performance 12
Worksite Development I-Trac Data Entry 12
Career Coaching Performance 13
Career Coaching I-Trac Data Entry 13
Additional Performance Definitions 14
Exit 14
Participant 14
Placement 14
Slot Allocation 14
Work Experience and Learning Opportunity Service Statuses 14
Worksite Satisfaction 15

File Documentation Requirements **16**
Worksite Development File Documentation 16
Youth Coaching Contractor File Documentation 17

Eligibility and Enrollment Requirements

All service providers must establish processes that prepare potential participants to complete eligibility and enrollment.

Eligibility

All PDX Youth@Work participants must be enrolled in either the NextGen or OYEP programs or be between the ages of 16 and 24 when they begin receiving PDX Youth@Work services.

To confirm the applicant's eligibility, staff must review one of the documents listed below, verifying that the **name** of the participant and **date of birth** on the PDX Youth@Work I-Trac Registration Tab match. A copy of the document is not required in the participant file; however, staff attestation in I-Trac is the verification of the applicant's eligibility. <u>To be used to confirm eligibility the document must include the applicant's birthdate</u>.

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

Enrollment

The following steps must be completed to enroll a participant in the PDX Youth@Work program:

- The participant applies for the program via the online *Program Interest Form*. Completion of this step creates a PDX Youth@Work record in I-Trac with an application date. Career coaches must manually complete fields for "Service Provider" and "Customer Of."
- The participant must attend an orientation. During the orientation, participants must complete the online *Work-Based Training Application*. Completion of this step updates the participant record in I-Trac with information from the *Work-Based Training Application* and automatically sets an orientation date.
- The participant must sign the *Participation and Information Sharing Agreement* form. For participants under the age of 18 the form must also be signed by a parent or legal guardian.

After a signed *Participation and Information Sharing Agreement* form has been received, the career coach must complete the Registration Tab in the participant's I-Trac record.

Service Design

There are seven service provision functions within the PDX Youth@Work program:

- <u>Worksite development contractors</u> are responsible for the recruitment and training of worksites, completion of worksite documentation and management of the *Worksite Agreement/Terms and Conditions*.

- Worksite liaisons are employed by the worksite development contractors and are the primary points of contact for worksites. They are responsible for placing the participant at a worksite, coordinating with the worksite supervisor and career coach, supporting the workplace relationship between the worksite and participant and assisting in mediating concerns that may arise throughout the duration of the work experience. The worksite liaisons verify hours worked for the employer of record.

- Youth coaching contractors are responsible for providing informational sessions, orientation and support concerning work-based training services including process and timelines for engagement, participant enrollment, work-based training matching, payroll onboarding and ongoing program support. They coordinate enrollment of prioritized Community Referral Partner participants and track usage of slot allocations across their contract.

- Career coaches are employed by contracted career coaching service providers and are the primary points of contact for participants. The career coach is responsible for supporting participants through the enrollment and onboarding process, communicating with the worksite liaison for appropriate worksite placement decisions, working with the participant on their work performance, providing necessary support services to the participant and assisting the worksite liaison with participant performance at the worksite. Career Coaches are also responsible for ensuring participants have a post-program “next step” planned for themselves at program exit and referring to other system services such as NextGen as applicable.

- Community Referral Partners are community-based organizations, school districts, and other youth-serving organizations who sign a Memorandum of Understanding outlining a partnership with Worksystems to align resources and services so eligible community youth participants have access to the PDX Youth@Work program. All Community Referral Partners are paired with a youth coaching contractor who is responsible for supporting the enrollment, opportunity matching and work-based training support for prioritized participants.

- The employer of record is an organization contracted by Worksystems that is the designated employer for the work experience and is responsible for the management of payroll, including wages, tax withholding and reporting.

- The payor of record is an organization contracted by Worksystems that is responsible for the payment and reporting of stipends.

Service Definitions

Career Labs

Targeted courses of instruction in workplace skills needed for the participant to be work ready. Providers are encouraged to utilize Worksystems approved Career Lab curriculum. Other tools are permissible if they fulfill the required learning objectives, which can be found on the Knowledge Base. Providers may enhance instruction in Career Labs with additional activities and may adapt parts of this curriculum to meet specialized needs of their participants.

Completion of the following Career Lab topics are required during a participant's engagement in the PDX Youth@Work program:

- Adaptability
- Analysis/Solution Mindset
- Collaboration
- Communication
- Self-Awareness

The five competencies of the Career Labs are introduced in orientation, practiced during Career Lab sessions, applied during the work experience and assessed through both the *Work Experience Supervisor Intern Evaluation* and *Youth Survey.*

Financial Literacy

Activities that teach participants how 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 and Employment, Budgeting, Consumer Skills, Credit and Debt, Financing Higher Education and Insurance. It is recommended that each lesson take between 25 and 35 minutes to complete.

Learning Opportunity

Learning opportunities are a structured and short-term engagement with documented learning objectives. Participants can earn stipends for participation in and completion of learning experiences. At scheduled intervals, the career coach will assess participant progress.

A learning opportunity cannot include activities typically done by an employee to the benefit of a business. An employer-employee relationship does not exist with learning opportunities. Participants are not working at a worksite and the learning opportunity is not considered a work experience. Participants are not paid wages but are paid a stipend for participation in and completion of education or learning activities.

Recommended learning opportunities include LinkedIn Learning courses, Metrix Learning courses and Everfi Financial Literacy course. Other learning opportunities may be permissible at the discretion of career coaching providers following the *PDX Youth@Work Learning Opportunity Guidance*.

A *Learning Opportunity Training Agreement* is used to establish the expectations and responsibilities of all parties when a participant is placed in a learning opportunity. The participant and the career coach will collaboratively determine the goals and expected professional development of the participant and complete the learning agreement, with input from the program supervisor. The agreement must include the type of learning opportunity, weekly check in schedule, learning objectives and the maximum amount of stipend that can be earned.

Completion of the learning opportunity is documented through verified attendance in a training or documentation of training completion such as a certificate or credential. If neither are possible, the participant can complete a reflection exercise (video or written report) after completion of the activity. All changes to a *Learning Opportunity Training Agreement* must be documented with a case note in I-Trac.

Administrative Rules

- *Learning Opportunity Agreements* are not to exceed $1,200. Exceptions can be made over $1,200 with approval of Worksystems' contract liaison.
- Participants must complete a W-9 unless they request and qualify for an exception by Worksystems. **Note**: Participants who have not been granted an exception and receive more than $599 in stipend payments in one calendar year will be issued a 1099 for tax reporting purposes.

  Stipend payments for Learning Opportunities are to be paid via a pay card through the payor of record contracted by Worksystems. Refer to additional guidance on Stipend Payments below in these regional program standards.

Refer to the Knowledge Base at https://help.worksystems.org/ for additional guidance.

Orientation

All program applicants must complete an orientation that includes an overview of the PDX Youth@Work program and completion of a *Work-Based Training Application*.

Refer to the Knowledge Base at https://help.worksystems.org/ for additional guidance.

Work Experience

A planned, structured short-term learning and training experience that takes place in a business worksite and involves work that is defined by a written, signed training agreement with the worksite. The agreement outlines the expectations and responsibilities of all parties and specifies learning objectives and criteria for demonstrating learning and skills gained.

A work experience must include academic and workplace skills as identified in the *Work Experience Training Agreement* and must include training on the information necessary to understand and work in specific industries and/or occupations. The worksite may be in the private for-profit, non-profit or public sector.

Work experiences are an employer-employee relationship with the participant and a wage is paid. The Internal Revenue Service Fair Labor Standards Act apply. All participants must complete all employer of record-required documents and processes, including but not limited to: W4 (both Federal and State) and Form I-9 and Verification.

Administrative Rules

- Participants may be at the worksite no more than 40 hours per week (no overtime); weekly work schedule may vary but a 25-to-30-hour work week is recommended.
- A maximum of 160 hours for the total work experience training unless an extension of hours is approved in writing by Worksystems' contract liaison.
- Participants are paid no less than the current minimum wage.

- Wages are paid by an employer of record contracted by Worksystems and are paid through direct deposit, check, or pay card. Check endorsement or direct deposit may be used as the signed receipt.
- Holiday, vacation, and sick leave policies are outlined in the *Employer of Record Policies and Procedures* manual.

Terminating Work Experiences

- Termination of *Worksite Agreement*
  A *Worksite Agreement* may be revoked at any point if the worksite violates a material term of the agreement such as displacement of an existing employee, nepotism, violation of regulations governing employment of a minor, significant safety violations, failure to adequately supervise the participant, failure to report worksite accidents or failure to report participant work hours in a timely and accurate manner.

  Any violation of employment law will result in immediate termination of the *Worksite Agreement*. Terminated Worksites may be subject to a one-year minimum sanction from participating in the PDX Youth@Work program.

- Participant Termination/Removal from Worksites
  Participants are informed of the behaviors that may lead to disciplinary action, including suspension, at the worksite or termination from the work experience. Participants violating worksite regulations or not adhering to their responsibilities as outlined in the *Work Experience Training Agreement* will be suspended or terminated.

  While worksite supervisors may suspend or remove a participant from their worksite for due cause, final termination of the participant is performed by the worksite development contractor.

Support Services

Overview

Support services are financial assistance to offset expenses necessary for a participant to engage in PDX Youth@Work. Support services are considered payments and do not extend program participation.

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 PDX Youth@Work service provider must have processes in place for appropriate referrals to such services as SNAP and community-based social services. Staff are 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 PDX Youth@Work services.

Prerequisites

Participants who seek support services must be enrolled in the PDX Youth@Work program.

Administrative Requirements

Documentation

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. Electronic signatures are allowed utilizing tools such as DocuSign and Adobe Sign.

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.

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, 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.

> **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.

Support Service Definitions

PDX Youth@Work 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).

Clothing/Personal Care

Clothing and/or related footwear or incidentals for interview (including grooming and hygiene products), or participation in a work experience or learning opportunity. 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 learning opportunity 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.

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.

Laptop Computer

Purchase of a basic laptop computer when needed to participate in program services or engage in a work experience or learning opportunity (when not provided by the employer or learning opportunity training provider).

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

Parking

When necessary, to enable the participant to engage in a work experience or learning opportunity (e.g., college campus parking fees or metered parking).

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

Tools

When participants are required to purchase their own tools for a work experience or learning opportunity, 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.

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 a work experience or learning opportunity.

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 if 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 engage in services and activities that support a work experience or learning opportunity. 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.

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.

Stipend Payments

opportunity activity. Stipends may be paid as an hourly amount attached to program engagement or as a total sum based on the length of the learning opportunity. Every stipend awarded must have a clear connection to a PDX Youth@Work I-Trac service. There must be clear goals and expectations set forth as to what the participant must do to earn a stipend, as documented in their *Learning Opportunity Training Agreement*. The business process for learning opportunities is posted on the Knowledge Base and outlines the requirements to receive the stipend and comply with these regional program standards.

Administrative Rules

Service providers must establish a written process for paying stipends 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 follow business processes and procedures established by Worksystems for stipend-allowable activities and related stipend amounts.
- Each stipend payment must include a record of the participant's engagement such as confirmation from the training provider of attendance, a certificate of training completion or credential. If none of these are possible, the participant can complete a reflection exercise (video or written report) after completion of the learning opportunity.
- Stipend payments are to be paid by check payable to the participant, direct deposit into an account in the participant's name or via pay card through a payment system where a specific pay card is assigned to a participant. Gift cards, gift certificates or retail vouchers cannot be used as stipend payment.
- Participants are required to sign an acknowledgment of receipt of the stipend. Check endorsement or direct deposit may be used as the signed receipt. Where pay cards are used, the signature is to be captured at the point the pay card is given to the participant, with the number/card ID noted. Electronic signatures are allowed utilizing tools such as DocuSign and Adobe Sign. Further stipend payments to the pay card do not require additional signature as it's treated as a direct deposit.
- Participants receiving a stipend must complete a W-9 form, unless they request and qualify for an exception by Worksystems. Participants who have not been granted an exception and receive more than $599 in stipend payments in one calendar year will be issued a 1099 for tax reporting purposes.
- Stipend payments must be paid from funds during the program year in which the program engagement occurred.

Performance

Worksite Development Performance

Performance goals for each of the following categories will be established:

- Minimum number of work experience position descriptions entered in the I-Trac WEX Bank.
- Minimum number of unique worksites entered in WEX Bank
- Minimum number of work experience placements.

Performance Element	Description
Worksite Supervisor Intern Evaluation Obtained Rate	**Denominator** Number of work experience services with a status of Started, Transferred, Completed-Hired, Completed-Not Hired, Not Completed-Quit, or Not Completed Fired. **Numerator** Number of participants with a Worksite Satisfaction record in I-Trac on the Outcomes Tab.
Worksite Satisfaction Rate	**Denominator** Number of participants with a Worksite Satisfaction record in I-Trac on the Outcomes Tab. **Numerator** Number of Worksite Satisfaction records with a "Yes" response entered in I-Trac on the Outcomes Tab.

Worksite Development I-Trac Data Entry

Performance Element	I-Trac Data Entry Fields
Worksite Supervisor Intern Evaluation Obtained Rate	Services Tab – Work-Based Training Control. • Work Experience Service with a status of Started, Transferred, Completed-Hired, Completed-Not Hired, Not Completed-Quit, or Not Completed-Fired. Outcomes Tab – Worksite Satisfaction Control.
Worksite Satisfaction Rate	Outcomes Tab- Worksite Satisfaction Control.

Career Coaching Performance

Performance goals for each of the following categories will be established:

- Number of participants placed in a work experience or learning opportunity.

Performance Element	Description
Work Experience Success Rate	**Denominator** Number of participants that have a work experience service end date. **Numerator** Number of participants that have a status of Completed-Hired or Completed-Not Hired in the work experience service in I-Trac.
Learning Opportunity Success Rate	**Denominator** Number of participants that have a learning opportunity service end date. **Numerator** Number of participants that have status of Completed in the learning opportunity service in I-Trac.
Career Lab Completion Rate	**Denominator** All enrolled participants. **Numerator** The number of participants who have at least four completed Career Lab services in I-Trac on the Services Tab.

Career Coaching I-Trac Data Entry

Performance Element	I-Trac Data Entry Fields
Work Experience Success Rate	Services Tab- Work Based Training Control. • Work experience service. Start of work experience = Entry of all data fields. End of work experience = Update of Status and Completed Hours. **Program Note: Work Experience data entry is the responsibility of Worksite Liaisons.*
Learning Opportunity Success Rate	Services Tab- Work Based Training Control. • Learning opportunity service. Start of learning opportunity = Entry of all data fields. End of learning opportunity = Update of Status.
Career Labs Completion Rate	Services Tab – Career Lab services with a status of completed.

Additional Performance Definitions

Exit

Enrolled participants are to be exited from PDX Youth@Work at the conclusion of services during each program year (June 1 through May 31). The Exit date is the end date of the last service in I-Trac.

Work experiences and learning opportunities *that cross into a new work experience program year (June 1)* may continue without re-applying to PDX Youth@Work. However, the participant enrollment must be exited at the conclusion of the work experience or learning opportunity. Subsequent work experience and learning opportunities will require a new application.

> **Note**: Enrolled NextGen or OYEP Participants may use the same PDX Youth@Work fund enrollment for the duration of their NextGen or OYEP participation.

Participant

An applicant with a registration and participation date in I-Trac plus at least one service after Orientation.

Placement

A placement is a participant with a work experience or learning opportunity service start date in I-Trac (excludes planned status).

Slot Allocation

Community Referral Partners and Worksystems youth coaching contractors are assigned slots for work experience and learning opportunities. A slot is one 160-hour work experience or one $1,200 learning opportunity. Slots may be used fractionally and are to always round up to the nearest .25. Worksystems will monitor data to track the impacts of fractional work experiences and learning opportunities.

- Year-round slots must have a work experience or learning opportunity I-Trac service Start Date between October 1 and May 31.
- SummerWorks slots must have a work experience or learning opportunity I-Trac service Start Date between June 1 and September 30.

Work Experience and Learning Opportunity Service Statuses

A service status is entered in the work experience or learning opportunity service in I-Trac under the following conditions:

Work Experience and Learning Opportunities

Planned. A participant has been matched with a work experience or learning opportunity and the service has not yet started.

Started. A participant has started the work experience or learning opportunity.

Transferred. This status is utilized when a participant has started a work experience or learning opportunity, but during the service the participant transferred to another work experience or learning opportunity.

Learning Opportunities Only
Completed. This status is utilized for learning opportunities only when the participant has completed 80 percent of the planned activities in their *Learning Opportunity Training Agreement*. A learning opportunity may also be defined as completed without reaching the 80 percent completion rate if the participant:

- Transitions to unsubsidized employment.
- Transitions to a secondary, post-secondary or occupational skills training program.
- Has an identified medical necessity that precludes them from participating in the learning opportunity.

Not Completed. This status is utilized for learning opportunities when the participant has not completed 80 percent of their *Learning Opportunity Training Agreement*.

Work Experiences Only
Completed – Hired. This status is utilized when a participant has started and completed a work experience and was hired by the worksite. This status is utilized for Work Experiences only when the participant has completed 80 percent of their planned work experience hours. A work experience may also be defined as *Completed-Hired* without reaching the 80 percent rate if the participant transitions to unsubsidized employment at their worksite

Completed – Not Hired. This status is utilized when a participant has started and completed a work experience and the participant was not hired by the worksite. This status is utilized for work experiences only when the participant has completed 80 percent of their planned work experience hours. A work experience may also be defined as Completed without reaching the 80 percent rate if the participant:

- Transitions to unsubsidized employment.
- Transitions to a secondary, post-secondary or occupational skills training program.
- Has an identified medical necessity that precludes them from participating in the work experience.

Not Completed – Fired. This status is utilized when a participant has started a work experience, but during the service, the participant was terminated from their placement.

Not Completed – Quit. This status is utilized when a participant has started a work experience, but during the service the participant voluntarily ended their participation without completing 80 percent of their planned hours.

Worksite Satisfaction
Collected on the *Worksite Supervisor Intern Evaluation* in the form of a Yes or No checkbox**.** Worksite satisfaction “yes” notes that the supervisor is satisfied with the overall performance of the participant.

File Documentation Requirements

Participant file documentation may be paper located in a physical file (to be kept in a secure [locked] file location); may be kept in a secure electronic file (secure means limited access/access requiring system permissions and is not in a folder accessible by all staff and with no security built in); or maintained in I-Trac.

Worksite Development File Documentation

The following standard forms will be used and are provided as Word document forms by Worksystems; it is required that the Worksite Development contractor creates professional documents for use with worksites.

Requirement	Detail	Location
Worksite Verification Checklist	Used to ensure that all aspects of the program have been reviewed with the worksite, including compliance with BOLI and workplace safety assurances.	Worksite Development File
Position Description	Should minimally include but is not limited to: Worksite name and address, worksite supervisor name and contact information, desired skills, type of work, any other requirements and schedule.	Worksite Development File
Worksite Agreement	Signed by the worksite company/organization and the worksite development contractor representative. These agreements are non-financial and outline the requirements and program responsibilities of the various parties involved in the work experience (worksite, worksite development contractor, employer of record). A single *Worksite Agreement* may be signed by municipalities with multiple worksite locations.	Worksite Development File
Work Experience Training Agreement	Participant training agreement that outlines the details concerning the tasks the participant is expected to complete and learning goals for the work experience. It also details the work schedule and contact information. A copy of the *Work Experience Training Agreement* is sent to the career coach using the I-Trac secure file exchange to be filed in the PDX Youth@Work, NextGen and OYEP participant files.	Worksite Development File

Requirement	Detail	Location
Worksite Supervisor Intern Evaluation	This is the tool for a worksite to provide an assessment to the participant regarding their demonstration of necessary workplace skills, including soft skills, needed for success in any work environment. The worksite liaison is responsible for collecting the *Worksite Supervisor Intern Evaluation* from the worksite. The career coach is responsible for reviewing the evaluation with the participant. A copy of the *Worksite Supervisor Intern Evaluation* is sent to the career coach using the I-Trac secure file exchange to be filed in the PDX Youth@Work, NextGen and OYEP participant file.	Worksite Development File

Youth Coaching Contractor File Documentation

Requirement	Detail	Location
Online Program Interest Form	The participant expresses interest for the program via the online program interest form. Completion of this step creates a PDX Youth@Work record in I-Trac with an application date.	I-Trac
Participation and Information Sharing Agreement	All participants must review and sign this form before I-Trac Registration can be completed. For participants under the age of 18 the form must also be signed by a parent or legal guardian.	Participant File
Work-Based Training Application	The participant completes the online Work-Based Training Application. Completion of this step updates the participant record in I-Trac with information from the work-based training application and automatically sets an orientation date.	I-Trac
Stipend Forms	**Federal Form W-9** Any participant receiving a stipend must complete a W-9 form unless they request and qualify for an exception by Worksystems. Submitted through the payor of record. No copies should be retained in the participant file.	Payor of Record

Requirement	Detail	Location
Work Experience Forms	**Participant Acknowledgements to Begin Work** All work experience participants must review and sign this form before a work experience can begin. For participants under the age of 18 the form must also be signed by a parent or legal guardian. ____________________ **Form W4 – Federal and State** Submitted through the employer of record. No copies should be retained in the participant file. **Form I-9 and Verification** Submitted through the employer of record. No copies should be retained in the participant file.	Participant File _________ Employer of Record File Employer of Record File
Work Experience Training Agreement **Work Experience Participants Only**	Participant training agreement that outlines the details concerning the tasks the participant is expected to complete and learning goals for the work experience. It also details the work schedule and contact information. A copy of the *Work Experience Training Agreement* is sent to the career coach using the I-Trac secure file exchange to be filed in the PDX Youth@Work, NextGen and OYEP participant files.	Participant File
Learning Opportunity Training Agreement **Learning Opportunity Participants Only**	Participant training agreement that outlines the expectations and responsibilities of all parties when a participant is placed in a learning opportunity. The agreement is developed by provider staff and the participant. This agreement documents the type of learning opportunity, weekly check-in schedule, program participation requirements and the maximum amount of stipend that can be earned.	Participant File
Stipend Payments	Each stipend payment for a learning opportunity must include a record of the participant's engagement such as confirmation from the training provider of attendance, a certificate of training completion or credential. If none of these are possible, the participant can complete a reflection exercise (video or written report) after completion of the learning opportunity.	Participant File

Requirement	Detail	Location
Worksite Supervisor Intern Evaluation **Work Experience Participants Only**	The form used for the worksite to provide an assessment to the participant regarding their demonstration of necessary skills, including soft skills, needed for success in any work environment. The worksite liaison is responsible for collecting the *Worksite Supervisor Intern Evaluation* from the worksite. The career coach is responsible for reviewing the evaluation with the participant.	Participant File
Pay Card Receipt Signature	Where pay cards are used, participants are required to sign an acknowledgement of receipt of the pay card. The signature is to be captured at the point the pay card is given to the participant, with the number/card ID noted. Electronic signatures are allowed utilizing tools such as DocuSign and Adobe Sign. Further payments to the pay card do not require additional signature as it is treated as a direct deposit.	Participant File