⚡ WORKSOURCE PORTLAND METRO

Regional Program Standards

Focus:	☒ WorkSource Centers	☐ Youth Program Services
	☐ Other:	

Topic: Center Services
WIOA Adult and Dislocated Worker Programs

Date: December 4, 2023	☐ New	☒ Revised	Page 1 of 59

The Portland Metro Workforce Development Board has adopted a Strategic Plan that calls for:

Alignment, service integration and efficient resource use through engagement of programs and partners in the regional WorkSource system.

Establishing the region as work-ready by ensuring workers have the skills they need to fill current and emerging, high-wage, high-demand jobs.

Ensuring employers have the skilled workers they need to remain competitive and contribute to local prosperity by focusing regional workforce efforts in support of Construction, Health Care, IT and Manufacturing.

Services for Workforce Innovation and Opportunity Act (WIOA) Adult and Dislocated Worker participants in the local area are offered through the established network of WorkSource Portland Metro Centers and select service contractors (WSPM). These regional program standards outline the policies, definitions, and performance established for the services.

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Quality Jobs Initiative

The Department of Labor and Worksystems are prioritizing advancing quality jobs in the workforce system through guidance, performance measurement, strategic use of funding opportunities, and provision of technical assistance to support quality jobs workforce strategies.

A Quality Job helps workers achieve economic stability and mobility, while prioritizing diversity and worker voice. The Columbia-Willamette Workforce Collaborative (CWWC) convened a Quality Jobs Council, comprised of 19 cross-sectoral participants representing businesses, workers, labor, service providers and government agencies to develop a regional definition of Quality Job to include 1) self-sufficiency wages, 2) safe working conditions/worker engagement, 3) predictable hours, 4) comprehensive benefits, 5) accessible hiring and onboarding practices and 6) training and advancement opportunities. The full CWWC Quality Jobs Framework can be found at this link.

Worksystems will continually engage with employers to increase quality job opportunities for populations that have been historically underrepresented in careers with elements of high job quality and build partnerships that raise job quality in meaningful ways for all residents in our region. Additional guidance and training regarding career coaching with an emphasis on job quality will be provided by Worksystems.

Additional information and guidance can be found below in the Additional Performance and Data Guidance section.

Eligibility – WIOA Adult & Dislocated Worker Program

WIOA Adult

An applicant is eligible as a WIOA Adult if they are:

- Age 18 or older
- In compliance with Selective Service Registration requirements.

WIOA Dislocated Worker

An applicant is eligible as a WIOA Dislocated Worker if they:

- Validate their name and date of birth (no minimum age requirement)
- Are in compliance with Selective Service Registration requirements
- Meet one of the following dislocation types.

Applicants under age 18 require parent/guardian signature for enrollment.

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Dislocation Types

Terminated or Laid-off Worker

The applicant must meet *each of the requirements* in A, B *and* C:

A. Has been terminated or laid off or has received a notice of termination or layoff from employment, including a separation notice from active military service (refer to Separating Service Member below for additional detail).

B. Is either eligible for or has exhausted their unemployment insurance compensation *or* have been employed for a period of at least three months to show attachment to the workforce, but they are not eligible for unemployment insurance compensation due to insufficient earnings or having worked for an employer that is not covered under the State unemployment compensation law.

C. Is unlikely to return to their previous industry or occupation. This can be due to any of the following circumstances:

- Because of negative economic conditions or sudden economic impact on industries or occupations (e.g., pandemic or natural disaster impacts).
- Because there is a decline in the applicant's previous occupations in the local market.
- Because of circumstances that cause significant barriers to employment, such as criminal background, lack of high school diploma or GED, disability, homelessness, cultural or language barriers, older worker (55+) or deficient in basic skills.
- Because their previous industry or occupation has been eliminated or the applicant has been unable to secure a position at a compensation level comparable to their previous occupation.
- Because they exhausted their unemployment benefits and have been unable to find a job in their previous industry or occupation.
- Because they were seasonally employed and unlikely to return because of mechanization or significant variance to normal seasonal employment patterns, resulting in uncertain return-to-work duties.

Business Closed or has had a Substantial Lay-off

The applicant must meet *one of the following* requirements:

A. Has been terminated or laid off or has received notice of termination or layoff from employment because of the permanent closure of, or any substantial layoff at (defined as 10 or more affected workers) the company (includes a plant, facility, military installation or business enterprise).

B. Is employed at a company where the employer has made a general announcement that the company or location will close within 180 days. A general announcement may include media coverage, filing of a WARN with the State, corporate written notice of intent to close within 180 days (written notice includes email communication, employer website and/or social media postings).

Self-Employed and Business Closed

The applicant must meet the following requirement:

A. Was self-employed (including employment as a farmer, rancher, fisherman, or an independent contractor or consultant not technically an employee of a firm or agency) but is unemployed as a result of general economic conditions in the community in which the individual resides or because of natural disasters.

Additional Guidance – Self Employed and Business Closed

To assist an applicant in determining if they meet this definition, consider the following.

A. A person is self-employed when they meet one of the following conditions:

- Files taxes as self-employed for their business on their personal taxes.
- Is considered an independent contractor by the business.
- Meets all the following criteria:
- Is not required by the business to complete an IRS W-4 form.
- Is not required to pay federal income tax or FICA payments from their paycheck(s).
- Liability or workers' compensation insurance for the individual is not paid by the business.
- Creates or provides the products or services they sell, or sets the price for the products or services they sell.
- Is responsible for the business expenses and losses.
- Receives profits from the business.

B. Economic condition is defined as the present situation in the overall economy of the area where the individual resides. When a local economy contracts or is weakened it may impact self-employed individuals. Examples include recession, impacts of pandemic, impacts of major employers that support a high percent of employment and local purchasing power, such as:

- Failure of one or more businesses to which the self-employed individual supplied a substantial portion of products or services.
- Failure of one or more businesses from which the self-employed individual obtained substantial proportion of products or services.
- Substantial layoffs from, or a permanent closure of, one or more plants or facilities that support a significant portion of the local economy.
- The unemployment rate for the county exceeds the State overall unemployment rate.
- Depressed prices or markets for articles produced by the self-employed individual.

Displaced Homemaker

The applicant must meet *one of the following* requirements:

A. The applicant has been providing unpaid services to their family in the home, and has been dependent on the income of another family member but is no longer supported by that income and is unemployed or underemployed and experiencing difficulty in obtaining or upgrading employment.

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B. The applicant has been providing unpaid services to their family in the home and is the dependent spouse of a member of the Armed Forces on active duty and whose family income is significantly reduced because of a deployment, a call or order to active duty, a permanent change of station or the service-connected death or disability of the service member. The applicant is unemployed or underemployed and is experiencing difficulty in obtaining or upgrading employment.

Additional Guidance – Underemployed
Underemployed is defined as any one of the following applying to the applicant's situation:

- The applicant is employed less than full-time and is seeking full-time employment.
- The applicant is employed in a position that is inadequate with respect to their skills and training.
- The applicant is employed but their family annual income does not exceed the higher level of the poverty line or 70 percent of the LLSIL.
- The applicant is employed, but their current job's earnings are not sufficient compared to their previous job's earnings from their previous employment.

Military Spouse
The applicant must *meet one of the following* requirements:

A. The applicant is the spouse of a member of the Armed Forces on active duty and has experienced a loss of employment as a direct result of relocation to accommodate a permanent change in duty station of the Armed Forces member.

B. The applicant is the spouse of a member of the Armed Forces on active duty and is unemployed or underemployed and having trouble in obtaining or upgrading employment. Refer to Additional Guidance – Underemployed.

Separating Service Member
The applicant must meet the following requirement *and documentation with a DD-214 is required*:

A. The applicant is a member of the Armed Forces who is separating from service to enter or re-enter the civilian labor force (being discharged).

I-Trac Information

For WIOA Adult, eligibility determination is validated based on I-Trac data entry of birthdate and selective service documentation.

For WIOA Dislocated Worker, eligibility determination is based on data entry of birthdate and selective service documentation and answers to dislocated worker types and appropriate documentation.

WIOA Adult Priority of Service

As established by local policy, the following participants enrolled in the WIOA Adult program may receive priority of service if the priority characteristic is appropriately documented and noted in I-Trac ("Priority Population" in the I-Trac Registration Tab record header).

In circumstances where there are multiple qualified applicants for the program, priority must be given to customers with the following characteristics and in the order outlined:

1. Veterans and eligible spouses who are included in the groups given statutory priority for WIOA Adult formula funding (see 2. below).

2. Individuals who are not veterans or eligible spouses and who meet one of the statutory priorities for WIOA Adult formula funding:

    - Recipients of public assistance
    - Low income
    - Basic skills deficient

3. Veterans and eligible spouses who are not included in WIOA's priority groups.

Documentation and Registration

Step 1: Complete Customer Registration

Using the "find customer" feature, search I-Trac for the customer using their legal name. If the customer is in I-Trac confirm the birthdate and last four of their social security number (if available) to verify that you are selecting the correct record.

Verify that the I-Trac customer record has a Job Seeker ID assigned. If so, move to Step 2 below.

If the customer is not in I-Trac or does not have a Job Seeker ID, the customer must begin registration by completing WOMIS Registration. Once the WOMIS registration record comes into I-Trac, move to Step 2 below.

Step 2: Add WIOA Enrollment

Staff must determine which WIOA fund they will be enrolling the customer in – Portland Metro WIOA Adult or WIOA Dislocated Worker, or both. Note that the WIOA fund name in I-Trac is "WorkSource Adult" and "WorkSource Dislocated Worker" and both are WIOA funds and report to the State and DOL as such.

Each enrollment is added and completed separately. There can only be one open Portland Metro Adult and one open Portland Metro Dislocated Worker enrollment at any one time.

- On the Providers Tab choose "add" Adult-Service Provider or Dislocated Worker Service Provider.
- Complete "Customer Of."
- Add Application Date as the date the registration process is being completed (NOTE: This date must be before the date of the first grant funded service).

Complete all information in the Registration Tab. I-Trac will automatically populate information on the Registration tab from an already existing Adult or Dislocated Worker enrollment episode or the Reportable Individual enrollment episode. Staff must review and update this information to reflect what is true at the time of enrollment in selected fund.

Step 3: Complete WIOA Documentation Control

To enroll into the WIOA Adult or Dislocated Worker program, documentation is required to verify certain information that was provided through the customer registration process. Documentation must be retained in the I-Trac document upload tool to be available for monitoring.

For ease of participant co-enrollment across local workforce areas in Oregon, Worksystems will accept eligibility determination and documentation of any other Oregon local area contracted service provider. The liability for eligibility will remain with the first contracted service provider making the current, open enrollment eligibility determination.

The WIOA Documentation is to be collected and uploaded to I-Trac using the tool and process provided through I-Trac. Follow Customer Secure Document Upload Tool instructions found on the I-Trac Resources/User Instructions tabs.

If documentation cannot be provided as outlined within these Regional Program Standards, the applicant may not be enrolled. However, please note, *applicants may continue to engage in Self-Directed Services through My WorkSource*.

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

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Eligibility Documentation

Following are the data elements which require documentation for eligibility determination, and a list of acceptable documents.

Where Customer Attestation is the allowable source, the signed application will be the documentation of the attestation. This will be reflected in I-Trac as "Signed Application." A parent or guardian signature is required where the Applicant is under age 18. The signed application must be retained in I-Trac.

Birth Date

One of these allowable documents is required, and must reflect a birth date that supports the information provided by the applicant and aligns with their age at registration:

Baptismal Record	Medical Record
Birth Certificate	Passport
DD-214 Military Separation Record	Public Assistance Record (Benefits Letter or print of System Crossmatch)
Driver's License	School Record or ID Card
Family Bible	Selective Service Registration Acknowledgement Letter
Government Issued Photo ID	Selective Service Registration Card
Hospital Record of Birth	Tribal ID Card
Justice System Record	Signed Application*

> ***Note:** Applicant attestation documented with the signed application may only be used when the applicant does not have one of the allowable birthdate validation documents available. When applicant attestation is used for date of birth documentation, it is required that securing documentation necessary to complete employment (I-9) documentation be part of the service plan.

Selective Service Registration

If the applicant is required to register for Selective Service and documentation under one of the categories outlined below cannot be collected, the applicant is not eligible to be enrolled in either the WIOA Adult or Dislocated Worker program. Applicants who would like additional information regarding Selective Service registration may be referred to this website: https://www.sss.gov/Registration-Info.

Applicants between the ages of 18 and 25 who have not yet registered must do so to move forward in the WIOA registration process. Applicants who do not have a social security number and are required to complete Selective Service registration can mail in their form (SSS Fom1). Mail the form to:

> Selective Service System
> P.O. Box 94739
> Palatine, IL   60094-4739

Website instructions and link to the form: https://www.sss.gov/register/#section1.

Required to Register (All elements must be true)	Not Required/Exempt from Registering (Any one of the elements must be true)
1. Sex-assigned male at birth 2. US Citizen OR immigrant residing in the US between the ages of 18 and 25 3. Age 18 or older 4. Born on or after January 1, 1960	1. Sex-assigned female at birth 2. Born before 1960 3. Under the age of 18 4. A seasonal agricultural worker on a H-2A visa 5. A lawful non-immigrant on a current non-immigrant visa 6. Was incarcerated / hospitalized / institutionalized continuously between 18th and 26th birthdays 7. Was not living in the United States between 18th and 26th birthdays 8. Was on active US Military, Coast Guard duty or a student in an Officer Procurement Program continuously between 18th and 26th birthdays

Documentation Types are defined by the requirement to register and whether the applicant registered or did not register for the Selective Service:

IF Requirement is	AND Registration Status is	Then Documentation Types must be one of the following
Required	Registered	• Download the Selective Service Registration Acknowledgement Letter from https://www.sss.gov/verify/ • Selective Service Registration Card • Stamped Post Office Receipt of Registration
	Not Registered: Applicant was unaware of the requirement to register and is now age 26 or older.	• Request for Status Information Letter & Supporting Documentation • Selective Service Status Information Letter
	Not Registered: Applicant willingly and lawfully chose not to register.	No document and applicant is not eligible.
Not Required/Exempt	Not Required to Register	• Signed Application (Age/Sex at Birth) • DD-214 Military Separation Record • Immigrant/Non-Immigrant Allowable Documents (refer to Appendix 1) • Records of Incarceration/ Hospitalization/ Institutionalization

Additional Selective Service Registration Notes
Incarceration/Hospitalization/Institutionalization
Applicants who were required to register but did not and 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 applicant was

not incarcerated, hospitalized or institutionalized then they were required to register, and the exemption does not apply. If the applicant did not register, then follow the requirements for documenting under "Required to Register and Did Not."

Military Service

If the applicant was in the US Military, Coast Guard or Officer Training between their 18th and 26th birthday they are not required to register and their DD-214 Military Separation Record is the documentation. **However, please note**: If at any time between their 18th and 26th birthday the applicant 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 applicant did not register, then follow the requirements for documenting under "Required to Register and Did Not."

Required to Register and Did Not

Applicants 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.

Where the *request is completed and not yet submitted* – A copy of the letter and supporting documents is to be provided to WorkSource, and a WIOA contractor program manager must review it to determine that the applicant 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 applicant 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-up to assure the submission occurs nor is it required that the Selective Service System response be returned and filed. The WIOA contractor program manager is authorized to make the determination at the time of WIOA documentation.

Where the *request has been submitted and the Selective Service response received* – If the applicant 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

The Applicant's attestation of the qualifying dislocation date is accepted, except for Military Separation. The applicant's signature on the application is their attestation.

Where the qualifying dislocation is based on a military person's separation from service, the DD-214 is required for documentation.

Priority of Service Documentation

Several characteristic types provide WIOA Adult participants with priority of service consideration when that status can be documented as outlined below. *Lack of documentation does not preclude applicants from being enrolled and receiving services* but does eliminate the priority of service benefit. Documentation requirements to be considered for Priority of Service benefits are:

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Veteran and Eligible Spouse Status

One of these allowable documents is required:

> DD-214 Military Separation Record
> Veteran Affairs Letter
> Veteran's Crossmatch

Low Income

Signed Application. Refer to Addendum B for additional information.

An applicant will be considered Low Income where any of the following circumstances apply. This determination is not limited to Priority of Service documentation but is required to complete registration.

- The applicant or their family receives or received during the previous six months any one of the following:
  - Assistance through the supplemental nutrition assistance program (SNAP)
  - Assistance through the temporary assistance for needy families program (TANF)
  - Assistance through the supplemental security income program (SSI/SSDI)
  - State or local income-based public assistance.
- Is in a family with total family income that does not exceed the higher of the poverty line or 70% of the lower living standard income level.
- Is an individual who receives, or is eligible to receive, a free or reduced-price lunch.
- Is a foster child.
- Is an applicant with a disability whose own income is the poverty line but who is a member of a family whose income does not meet this requirement.
- Is a homeless applicant or a homeless child or youth or runaway youth.
- Is a youth living in a high-poverty area.

Public Assistance

One of these allowable documents is required:

Public Assistance Type	Allowable Documentation Types
Exhausting TANF (within 2 years)	Public Assistance Benefits Letter (TANF) Referral from TANF Public Assistance Crossmatch
General Assistance (State or Local Government)	Public Assistance Check copy Public Assistance Medical Card showing status Public Assistance Benefits Letter (reflecting type) Public Assistance Crossmatch
Refugee Cash Assistance	Public Assistance Check copy Public Assistance Medical Card showing status Public Assistance Benefits Letter (reflecting type) Public Assistance Crossmatch

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Public Assistance Type	Allowable Documentation Types
Supplemental Nutrition Assistance Program (SNAP)	Public Assistance Benefits Letter (SNAP) Referral from SNAP Public Assistance Crossmatch
Social Security Disability Insurance (SSDI) (Received in the Past Six Months)	Public Assistance Benefits Letter (SSI/SSDI) Referral from Social Security Administration Crossmatch with Social Security Administration database
Supplemental Security Income (SSI) (Received in the Past Six Months)	Public Assistance Benefits Letter (SSI/SSDI) Referral from Social Security Administration Crossmatch with Social Security Administration database
TANF (Received in the Past Six Months)	Public Assistance Benefits Letter (TANF) Referral from TANF Public Assistance Crossmatch

Deficient in Basic Skills

The Basic Skills documentation is staff assessment. This is documented in I-Trac with the assessment selection made by staff in the Basic Skills control. This determination is not limited to Priority of Service documentation but is required to complete registration. If no basic skills deficiency is noted _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.

Applicants seeking WIOA Adult services will be assessed to determine their basic skill level at the point of program eligibility determination and enrollment. Applicants determined to be Basic Skills Deficient will receive WIOA priority of service considerations. Basic Skills Deficient is defined as:

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):

- **Adult Education**: 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.

- **Limited English Skills**: Determined to be limited English skills proficient through staff-engagement and observation.

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

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

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

- Applicant is co-enrolled in another Portland Metro program that has made the basic skills deficient determination or is co-enrolled in another local workforce area where that contractor made the basic skills deficient determination.

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Enrolled Participant

Once all elements of eligibility determination, documentation and I-Trac registration have been completed, obtain the Applicant's signature on the application utilizing the I-Trac eSignature process. If an eSignature cannot be obtained, print the application from the I-Trac Customer Documents menu for signature and upload the signed application to I- Trac.

The applicant must begin participation in program services within 45 days of the registration date. Participation begins with the first WIOA-funded Basic or Individualized Career Service entered in I-Trac.

Discretionary Grant Enrollment

A discretionary grant is awarded by a government agency or other organization at its discretion, rather than through a formula or other predetermined process such as WIOA. The WSPM system has several discretionary grants available to support participant engagement in the system. To spend discretionary grant funding to support a participant's engagement in WSPM, the participant must be enrolled in the discretionary grant fund(s) in I-Trac. Contractors will refer to and follow the discretionary grant program(s) regional program standards for additional details and requirements.

Transferring Participants

Participants may be transferred from one WSPM service provider to another when it is in the best interest of the participant. When a transfer occurs, the current service provider must:

- Obtain approval from both the current WSPM contractor program manager and the receiving WSPM contractor program manager. Document this in the Transfer control in I-Trac on the Outcomes Tab.

- Enter a case note that explains the reason for the transfer.

- Upload to I-Trac all eligibility and performance documentation obtained prior to the transfer date.

- Enter a Transfer control record on the Outcomes Tab in the I-Trac record.

All eligibility documentation for the WSPM enrollment remains the responsibility of the service provider that collected and validated the documents. If there are eligibility documentation questions that arise during monitoring that lead to questioned or disallowed costs, the service provider that managed the eligibility documentation process is responsible for the questioned/disallowed costs. All performance is the responsibility of the new service provider.

Transfers ❔					
	Date	**Transfer From**	**Transfer From Authorized Rep**	**Transfer To**	**Transfer To Authorized Rep**
save cancel		NextGen - POIC		--Select One-- ▾	

Addendum A – 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	AND	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	OR	First Date of Entry to U.S. was before turning 26 YEARS OLD Provide proof from first entry and any others.	AND	
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.

Addendum B – Low Income Guidelines

Family Size Definition

Two or more persons related by blood, marriage, or decree of court, who are living in a single residence and are included in one or more of the following categories:

- A married couple and dependent children,
- A parent or guardian and dependent children, or
- A married couple

The composition of the family is determined at the date of the application. Members in the household who do not meet one of the categories identified in the definition of family are not included in family size.

Disability Family of One

When determining family income for eligibility purposes, an individual with a disability's income is based on the individual's income rather than his or her family's income. The individual's income must meet the low-income definition.

Dependent Child

As referenced in the definition of family, Dependent child includes children living in a single residence with parent(s) or guardian(s) and who DO NOT meet the definition of independent child based on the Free Application for Federal Student Aid (FAFSA) guidelines at https://studentaid.gov/apply-for-aid/fafsa/filling-out/dependency.

Independent Child

Those children living in a single resident with parent(s) or guardian(s) and who fall into one (or more) of the following categories:

- Is 24 years of age of older by December 31 of the current year.
- Is an orphan or ward of the court or was a ward of the court until the individual reached the age of 18.
- Is a graduate or professional student (in college, beyond a bachelor's degree).
- Is a veteran of the Armed Forces of the United States.
- Is a married individual.
- Has legal dependents other than a spouse.
- Is a student for whom a financial aid administrator makes a documented determination of independence by reason of other unusual circumstances.
- Is currently living with parents(s) or guardian(s) but provides more than 50% of his/her own support.

Income Calculation

All income received by all members included in the family size (determined at time of application) during the six-month period prior to Application, annualized by multiplying the six-month income by two (six-month income x 2). Unless specifically identified as being excluded from family income, income must be included. Income of prior family members who may have comprised part of the family during the past six months but are no longer members of the household at time of application (i.e., divorced, separated, or

deceased spouse, or other family member) would not be counted for income determination purposes. Only the income of members of the current family should be counted and applied against the current family size.

WIOA Includable Income	
Income Type	**Income Type Description**
Alimony	Payments made by an ex-spouse
Allotments	Military family allotments or other regular support from an absent family member or someone not living in the household
Annuity Payments	Regular insurance or annuity payments
Child support	Child support payment
Grants	College or university grants, fellowships, and assistantships
Lottery	Net gambling or lottery winnings
Military	Pension payments such as those received by military retirees and pension benefits
Pensions	Private, government employee
Retirement	Railroad retirement benefits
Self-Employment	Net receipts from farm self-employment (receipts from a farm which one operates as an owner, renter, or sharecropper, after deductions for farm operating expenses). Net receipts from non-farm self-employment (receipts from a person's own unincorporated business, professional enterprise, or partnership after deductions for business expense).
Social Security (SSB, SSDI)	Old Age Survivors Income (SSB); Social Security Disability Insurance (SSDI)
Stipends	Training Stipends
Unemployment	Unemployment compensation
Union Strike Benefits	Benefits from union funds
Wages	Money wages and salaries before deductions (gross)
Worker's Compensation	Benefits and medical are paid or awarded to employees for on-the-job injuries and benefits paid to dependents of employees killed in the course of employment
WIOA	WIOA One Stop partner programs where income is not subsidized (e.g., On-the-Job Training wages)

WIOA Excludable Income	
Income Type	**Income Type Description**
Assets	Any assets drawn down as withdraws from a bank, the sale of property, a house, or a car
Capital gains	A profit from the sale of property or of an investment.
Educational Assistance	Educational financial assistance under Title IV of the Higher Education Act, Pell, Grants, Federal Supplemental Educational Opportunity Grants, Federal Work Study, Stafford, and Perkins loans
Fringe Benefits	Non-cash benefits such as: employer paid fringe benefits, food or housing received in lieu of wages, Medicare, Medicaid, food Stamps, school meals and housing assistance
Foster Care	Foster childcare payments
Military	Any amounts received as military pay or allowance by any person who served on active duty
Other Payments	Tax refunds, gifts, loans, lump-sum inheritances, one-time insurance payments or compensation for injury

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WIOA Excludable Income	
Income Type	**Income Type Description**
Scholarship	Needs-based scholarship assistance, State, and private grant aid
Social Security (SSI)	Supplemental Security Income (SSI)
Tribal	Income derived by a member of an Indian tribe from fishing rights-related activity of the tribe, payments made to Indians under PL 98-64 ("An Act to provide those per capita payments to Indians may be by tribal governments, and for other purposes.")
Veterans	Pay or allowances previously received by any veteran (whether an applicant or a member of the applicant's family) while serving on active duty in the United States Armed Forces, payments received by a veteran for participation in National Guard service/activities, educational assistance and compensation to veterans and other eligible persons under Title 38
Vocational Rehab	Payments made to a client (except for OJT payments)
Welfare Payments	TANF, Emergency Assistance (EA), non-federally funded General Assistance (GA) and Refuge Cash Assistance (RCA)
WIOA	One Stop partners programs where income is subsidized. (e.g., work experiences, support services)

Program Design and Service Delivery

There are five categories of WSPM services: Self-Directed/Informational, Basic Career Service, Individualized Career Service, Training and Follow-Up.

Self-Directed/Informational Services

Services that provide readily available information to the public that do not require an assessment by a staff member of eligibility or fit for the program or an assessment of the individual's skills, education, or career objectives. Services include but are not limited to MyWorkSource, labor exchange information, information sessions and outreach and orientation to services available through the workforce system. Self-Directed services do not require WIOA eligibility and registration be completed and do not extend the Participation Date.

Basic Career Services

Services which are universally accessible and are made available to all individuals seeking employment and training services in the WorkSource Center. Generally, these services involve less staff time and involvement and include but are not limited to: initial assessment of skill levels, including literacy, numeracy and English language proficiency as well as aptitudes, abilities and support service needs; career exploration; workforce information on programs and services; and program referrals. Career Coaching and Job Search Assistance are the Basic Career Services delivered through WSPM and tracked and reported through I-Trac. Basic Career services require WIOA eligibility determination and registration be completed before the service can be provided. A Basic Career Service can be the WIOA enrolling service.

Individualized Career Services

Services determined to be appropriate for the participant by a WSPM staff for the participant to obtain or retain employment. These services involve significant staff time and are customized to the individual's need. Individualized Career Services include but are not limited to: Comprehensive and specialized assessments; development of an individual training and employment plan; ESL and GED classes; Work Experience; Workforce Preparation and Pre-Apprenticeship programs. Individualized career services require completed WIOA eligibility determination and registration before the service can be provided. An Individualized Career Service can be the WIOA enrolling service.

Training Services

Please refer to the Training, Education and Employment Skills section of these regional program standards for detailed information on available Training services through WSPM.

Follow-Up Services

Follow-Up Services are provided upon a participant's completion of their service strategy and are intended to help the participant be successful in employment. Follow-Up services are available for up to 12 months following program completion. Career Coaching and Job Search Assistance are the Follow-Up Services in I-Trac.

Follow-up services must be offered to all participants upon the start of their employment. Follow-Up services must also be made available to any participant following exit from the program unless the participant declines to receive them, or the participant cannot be located or contacted.

Support service payments and Training services are not allowed as Follow-Up. Contacting a participant to make appointments and secure performance-related data and information does not constitute follow-up services and should not be reported as such.

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.

Service Definitions

Administrative Requirements

Only WIOA grant-funded services may be entered in the WSPM record. If services are co-funded between multiple grants the participant must be enrolled in each of the grants and the service must be copied to all I-Trac funds being utilized.

1:1 Individual Training Plan Development

(Individualized Career Service)

A session with staff where a plan for skill attainment required to secure employment is developed or modified. The plan is a document that identifies:

- Employment goals and objectives and the combination of services that can assist the participant in reaching them.

- Planned training opportunities, education and/or skill development, including identification of the responsible parties.

- Support service payments and other planned activities or resources needed to accomplish the employment goals, including identification of the responsible parties.

Individual Training Plans are to be reviewed with the participant and updated on a regular basis to reflect changes in goals, barriers or service needs.

Adult Basic Education

(Individualized Career Service)

Adult Basic Education (ABE) classroom instruction with structured, formal written curriculum designed to systematically address a basic skill deficiency. Classes may be self-paced with individualized instruction. The length of instruction depends on student needs. ABE must be identified in a participant's service plan, and lead to vocational training or employment. Student progress is monitored, and testing is done to measure student progress.

Career Coaching

(Basic Career Service and Follow-Up Service)

Career Coaching is relationship-based guidance and coaching dedicated to increasing the self-sufficiency of participants through unsubsidized employment. Best practices show that participants who maintain periodic communication with a Career Coach are most likely to benefit from services.

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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.

- With the participant, develop a plan that incorporates a customized set of WorkSource services and outside resources that will assist them in meeting their goals.

- Coach participants in the personal and interpersonal ("soft" or "life") skills required to obtain and retain employment.

- Assist participants in identifying and securing the resources and support 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.

- Provide regular check-ins to track participant progress and ensure participants retain employment, including assistance in career advancement planning, resource planning, and re-placement in employment.

- Provide and/or offer connections to employment, childcare and/or housing services which are culturally specific and/or culturally responsive, based on participants' needs.

- Management of the tracking, documentation and reporting requirements of program participation and performance.

English as a Second Language Instruction

(Individualized Career Service)

Structured, formal written basic skills curriculum designed to improve an individual's understanding and use of the English language. Instruction is provided by an individual with specialized education or training in the delivery of English as a Second Language (ESL) services. The instruction should be identified in an individual's service plan and lead to vocational training or employment.

General Equivalency Degree Instruction

(Individualized Career Service)

Structured and formal basic skills curriculum designed to address basic skills deficiencies and lead to passage of General Equivalency Degree (GED) tests and the award of a GED credential, which is commonly considered equivalent to a high school diploma. Classes may be self-paced with individualized instruction. The length of instruction depends upon the student's needs. Individualized electronic instruction through computer-based systems may be a delivery system but it must include regular access to, and assistance from, instructors. Instruction must be part of the participant's training plan and lead to vocational training or employment. Student progress is monitored, and testing is done to measure student progress.

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Job Search Assistance

(Basic Career Service and Follow-Up Service)

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.

National Career Readiness Certificate

Please refer to the National Career Readiness Certificate section of these regional program standards.

Prosperity Planner

An on-line budget and planning tool that helps users create a realistic basic budget, identify potential work supports, and create "test budgets" to help determine whether the career or job they are considering will pay enough to support their household. The Prosperity Planner also calculates the wage the individual must earn to be self-sufficient in each of Oregon's 36 counties. In combination with guided instruction, the Prosperity Planner can demonstrate the value of continuing education and entering a career with potential for growth. The Prosperity Planner is found at prosperityplanner.org

Individuals receiving financial assistance for training or support services through WorkSource Centers are required to complete and save a budget using their current, actual income and expense information. This is the budget WorkSource staff are to use to justify financial assistance and should support the participant's resource plan.

Rapid Response

Rapid Response is a WIOA Dislocated Worker initiative that assists workers and businesses through periods of economic transition that will occur throughout a business cycle. The primary goals are to prevent layoffs, when possible, limit the impact on workers should layoffs occur, and help dislocated workers transition to new employment as quickly as possible. Members of the Rapid Response Team provide on-site contact with employer and employee representatives within a short period of time after becoming aware of a current or projected permanent closure or substantial layoff. Refer to Lay-Off Assistance Projects regional program standards for more detailed information.

Work Ready Certification

Skills validation services are an essential function of WSPM to ensure that participants referred for employment meet business needs and the requirements for the positions to which they are referred.

The Work Ready Certification is a skills validation process. Once completed, participants are placed in a pool to be prioritized for job placement services. Work Ready Certification validates that a participant has:

- A completed iMatchSkills Profile.
- A Resume.
- Application materials for employment referrals.
- Interview ready skills.
- Necessary soft skills and has addressed barriers to employment and basic needs.

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- Demonstrated essential employability skills which include self-awareness, adaptability/flexibility, communication, collaboration, analysis/solution mindset, digital fluency, networking/social media, empathy, entrepreneurial mindset, resiliency, and social diversity/awareness.

Achievement of these elements results in Work Ready certification. Following certification, staff developed job opportunities are provided to the participant. Placement must result in permanent and unsubsidized employment consistent with the participant's vocational objective as defined in their employment plan.

Workshops

Topics presented in a group learning environment – either in-person or virtual – designed to assist participants in developing the job search or basic skills necessary to be competitive in the labor market. Workshops may be categorized as either Self-Directed/Informational, Basic Career Service or Individualized Career Service. When categorized as either a Basic Career Service or Individualized Career Service, WIOA enrollment is required.

Orientations
The workshops are designed to provide information to participants about specific WSPM programs and activities that require prerequisite work by participants to access. Most Orientation workshops are categorized as a Self-Directed/Informational service as they do not include an assessment of eligibility or fit for a program.

Standard Workshops
Standard workshops are considered Basic or Individualized Career Services and are delivered in every Center using WSPM curriculum and following guidelines for frequency, prerequisites, and outcome goals. Standard Workshops include Resume Development, Basic Computer Skills, Job Search, Interviewing Skills, Networking/Social Media and Interpersonal Skills.

Supplemental Workshops
Designed and facilitated by each WorkSource Center to meet the specific needs of their participant base. Supplemental Workshops must be approved by Worksystems before being finalized and offered in the Center and may be categorized as Informational, Basic or Individualized Career Services depending on the content and structure.

Training, Education and Employment Skills

There are three categories of Training, Education and Employment Skills services offered through WSPM – classroom and cohort training, Pre-Apprenticeship programs and Workforce Preparation activities. All payments for these training services are entered in I-Trac on the Payments Tab in the Training & Education Service Payments control.

Classroom and Cohort Training

Training may be offered through a school or training organization on a per-student basis or offered through a cohort agreement with Worksystems. Classroom training programs must be on the Portland Metro Eligible Training Provider List (ETPL). A training cohort is defined as one group of participants enrolled in and attending the same training sessions together; additionally, the training must have been procured for following Worksystems' procurement policy.

Classroom and Cohort Trainings place the participant in the denominator for WIOA Measurable Skill Gains and Credential performance. All Classroom and Cohort Training services are funded through the WSPM system and include:

Occupational Skills Training

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. Occupational Skills Training must:

- Be on the Portland Metro ETPL.
- Be instructor-led in either an in-person or virtual format.
- Be outcome-oriented and focused on an occupational goal specified in the participant's Training Plan.
- Be of sufficient duration to impart the skills needed to meet the occupational goal.
- Lead to the attainment of a recognized, US Department of Labor-defined credential.

Prerequisite Training

Any class or training that is required by the training provider prior to enrollment in a training program that is represented on the ETPL. This excludes activities defined under Workforce Preparation. The training program on the ETPL must indicate the prerequisite course is required for entry into the training program.

Pre-Apprenticeship Training Program

A program designed to prepare participants to enter and succeed in a Registered Apprenticeship Program. Pre-Apprenticeship programs are Oregon BOLI registered and should have at least one, if not more, documented partnership(s) with a Registered Apprenticeship Program that will assist in placing participants who complete the Pre-Apprenticeship program into their Registered Apprenticeship program. Pre-Apprenticeship programs are not required to be on the ETPL and do not place the participant in the denominator for either WIOA Measurable Skill Gains or Credential performance.

If a Pre-Apprenticeship program service also includes elements of Occupational Skills training, the service must be entered in I-Trac as both a Pre-Apprenticeship Training service and an Occupational Skills Training service. When entered as an Occupational Skills Training service the participant will fall in the denominator of the WIOA Credential and Measurable Skills Gain performance.

Workforce Preparation

Activities, programs or services designed to help an individual acquire any combination of the skills necessary for successful transition into and completion of postsecondary education or training, or successfully entering employment. Activities may include but are not limited to computer literacy, forklift operator, flagger, OLCC certificate, first-aid required for an employment position, food handlers' certificate and other occupational skills education leading to non-Department of Labor (DOL) defined credentialed certifications that are required for entry level, health or safety employment requirements. Workforce Preparation services are not required to be on the ETPL and do not place the participant in the denominator for WIOA Measurable Skill Gains or Credential performance. Payment for workforce preparation does not require an Individual Training Account (ITA) Application.

Requirements to Start Training Service

Participants who want to receive Training, Education and Employment Skills services through WSPM must complete the following requirements (there are no exceptions):

- WorkSource Registration and Enrollment.
- Consultation with WorkSource training/skills team staff.
- Individual Training Account (ITA) or Cohort Training Application (as appropriate, not required for Workforce Preparation services).

Individual Training Account (ITA)

A financial obligation by a WSPM Center to support classroom-based training or instruction in a program that is on the ETPL. ITAs may include the costs of tuition, related course fees (e.g., school, lab) and books required for the training program.

Individual Training Accounts (ITA) provide the scholarship for participants to complete training programs. ITAs will be provided to eligible participants on the basis of an individualized assessment of the participant's job readiness to obtain or retain employment that leads to economic self-sufficiency; their need for training; financial need; and potential for successful completion, as documented on the participant's WSPM Scholarship Application. If it is determined that the participant is best served with a ITA, these additional requirements must be considered and met:

- The training program must be on the WSPM ETPL. Please refer to the ETPL section of these regional program standards for more information and requirements.

- The participant meets the qualifications and training prerequisites established for the training program by the training provider.

WIOA funding for training is limited to participants who are unable to obtain grant assistance from other sources or require assistance beyond what is available from other sources. WSPM Centers must consider the availability of all sources of funds to pay for training costs such as TANF funds, State training funds and Federal Pell Grants. In coordinating the use of the different funds, WSPM Centers may consider the full cost of participating in training services (using the Prosperity Planner budget), including living expenses, childcare, transportation, etc. The training funding package may consider the available resources to cover these costs and apply them accordingly to support the participants' engagement in training.

In addition to the invoice from the training provider, the following documentation must be maintained in the financial files attached to the ITA payment:

- A copy of the WSPM Eligible Training Provider List page (dated) depicting the selected training.
- A copy of the participant's Training Review form.

Pell Grant Requirements

If the training program is Pell Grant-eligible, the participant must apply for the Pell Grant. If awarded, the Pell Grant may be applied toward all Pell-eligible costs outlined in the training budget and may be coordinated with the approved WIOA funding. Each grant may pay for their grant-eligible costs.

When PELL is awarded, it is not required to immediately recapture WSPM training funds paid out and subsequently covered by a Pell Grant. Instead, the school may award the PELL grant to the participant to use to pay for any other PELL eligible expenses. In these cases, the PELL must be considered in any participant support service requests as there may be an overlap between the PELL support services and WSPM support services.

After the Pell Grant has been applied to all Pell-eligible costs, if there are funds remaining those excess funds must be applied to the WIOA-paid costs (tuition, fees, books), reducing the WIOA award.

Training Start
The start date in a training program is considered the first day that a participant attends the training.

Training Completer
A participant who completes a planned program of training with a "complete" or "pass" designation from the school. Training completion must be reflected in the I-Trac record with a service end date and status of Completed. The training end date is the last date the participant attended any service provided as part of that training program, including the dates of examinations if they were provided as part of the service. Credentials obtained by completing training must be entered in I-Trac and a copy uploaded to the I-Trac participant record.

Work Based Training

There are three categories of Work Based Training – On-the-Job Training, Registered Apprenticeship and Work Experience.

On-The-Job Training

On-the-Job Training (OJT) assists businesses in training skilled, productive workers. OJT's may be used to help train newly hired employees and employees hired to regular permanent employment through a staffing service relationship who need additional training to meet the employer's minimum standards.

The OJT is an agreement between the WorkSource program and an employer who agrees to act as a training provider. The OJT is a hire-first program; the trainee is hired as an employee of the company, a training plan is developed to outline the skills the trainee is lacking to be proficient in the position minimum requirements, and the employer agrees to provide the necessary training on the job to bring the trainee up to entry-level standards for the position. The employer is compensated for the extraordinary costs and decreased productivity associated with training the participant.

> Refer to OJT regional program standards and the OJT development manual for additional detail and requirements.

Registered Apprenticeship

A work-based training program registered through the DOL and Oregon Bureau of Labor and Industries (BOLI) that connects job seekers looking to learn new skills with employers looking for qualified workers. Employers, employer associations and joint labor-management organizations, known collectively as "sponsors," provide apprentices with paid on-the-job learning and related academic instruction that reflects industry needs. The

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goal of the instruction is to provide workers with advanced skillsets that meet the specific needs of their employers. The apprenticeship program must be on the Oregon ETPL.

Work Experience

Work Experience (WEX) services provide participants with career exposure, opportunities to practice workplace skills and work ethic and, in some instances, provide a re-connection to the workforce. A WEX is 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 WEX 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 applies. 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.

All WEX services are funded through the PDX Metro Works program. Services provided through PDX Metro Works are to be coordinated with the program staff. Please refer to the PDX Metro Works regional program standards for detailed information, policy and procedures related to WEX services.

Administrative Rules

A WEX service is to be:

- No more than 40 hours per week (no overtime).
- A maximum of 300 hours for the total WEX service.
- Paid at or above the current minimum wage for the Portland Metropolitan area. No WEX will pay a wage less than the area minimum wage.
- Wages will be paid by an employer of record identified by Worksystems.
- Participants are not paid for holiday, vacation, or sick leave.

The following steps are to be completed to begin a WEX service:

- The participant's completed resume is submitted by the career coach to a PDX Metro Works staff. .
- The participant meets with a PDX Metro Works staff who will assess readiness for a WEX service.
- The participant completes the hiring process with the approved Employer of Record, including completion of the Form I-9 and document verification. The hiring process must be completed before a participant can begin a WEX.

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Eligible Training Provider List

To ensure that Portland Metro training investments have maximum impact for both job seekers and the local area's employers, Worksystems will establish a list of target occupations that forecast growth and opportunity. The workforce development system will focus investments and training services on these target occupations. As a result, training services will be directly linked to in-demand occupations that provide a career path leading toward self-sufficiency. Target occupations will be identified as outlined below.

Identifying Target Occupations

Occupations that meet at least two of these three criteria qualify as targeted occupations for investment. Priority is given to trainings that result in occupations that have a $21/hour Median Wage.:

- $21/hour Median Wage
- Credentialing is available for the occupation in a timeframe of 2 years or less.
- 50+ annual openings projected.

From time to time there may be occupations that meet the criteria but are not included on the Targeted Occupations List based on relevant factors such as gathered industry intelligence. Target occupations will be reviewed and adjusted as necessary, based on changes in projected supply and demand and feedback of regional employers, Oregon Employment Department staff and partner organization staff.

Identifying Eligible Trainings

Worksystems staff will use the State ETPL as a starting point to populate the WSPM ETPL. Available training in Multnomah, Washington, and Clackamas counties from the State ETPL that train individuals to enter the targeted occupations will migrate from the State ETPL to the WSPM ETPL.

Training in Grant Supported Occupations

From time-to-time Worksystems will be awarded discretionary grants that include within their program structure and grant statement of work the development of an ETPL specific to that grant's focus. When this is the case, the regional program standards for the grant will outline the requirements for consideration to be included on the grant specific ETPL, including review and decision-making protocols.

In addition, Worksystems may be awarded discretionary grants that do not require a grant specific ETPL but can fund training that is not on the State ETPL. When this is the case, the WSPM ETPL will note what training can be funded with these discretionary grants.

> **Note:** In these cases, _only_ funding from the discretionary grant source may be used to fund the training program for grant enrolled WSPM participants. The grant specific ETPL will indicate the allowable fund(s) that can be used to support the training.

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WSPM ETPL Life Cycle

Target Occupation Trainings

Any training that has migrated from the State ETPL to the WSPM ETPL because it aligns with a Portland Metro target occupation will remain on the WSPM ETPL so long as all the following are true:

- The training in question remains on the State ETPL.
- The occupation remains on the Target Occupations list.
- Worksystems has not removed the training provider or program from the list (see below).

Removal from the WSPM ETPL

Worksystems may remove eligible training providers and programs from the WSPM ETPL when Worksystems finds that an eligible training provider, a program or both:

- Has been the subject of multiple documented complaints from WorkSource-funded training participants during any one program year or across consecutive program years.

- Receives consistently poor ratings from WorkSource-funded training participants during any one program year or across consecutive program years.

- Fails substantially to deliver promised training or aspects of training described in applications to the State or advertised in program website information and marketing materials, including but not limited to instructor qualifications, duration of training, number of classes or sessions to be held and post-training job search assistance.

A program or provider with a finding will be removed from the WSPM ETPL for no less than 1 year. Worksystems will provide written notification of removal of program(s) to the provider. When a program of training is removed from the WSPM ETPL, WorkSource-funded participants currently enrolled in the program with the support of an ITA may complete their training.

Requests for Appeal

A training provider may file an appeal of removal of a program(s) from the WSPM ETPL. All appeals must be submitted in writing within 30 calendar days of the date of the notice of removal. The request for an appeal hearing must include:

- The name, address, and telephone number of the training provider contact.
- A detailed explanation as to how the reasons cited for removal are erroneous.

Appeals must be sent to:

Worksystems
Attention: Adult Services Manager
1618 SW 1st Avenue, Suite 450
Portland, OR 97201

An appeals resolution will be scheduled within 60 days of the date the appeal request was received.

Requests for Reinstatement to Local ETPL

Training providers removed from the WSPM ETPL may request reinstatement after the period of removal has ended. The request for reinstatement must include:

- The name, address, and telephone number of the training provider contact.
- A detailed description of how the provider or program has addressed Worksystems' findings.

Requests for reinstatement must be sent to:

Worksystems
Attention: Adult Services Manager
1618 SW 1st Avenue, Suite 450
Portland, OR 97201

Worksystems will review the request and provide written notification of the decision within 60 days of the date the request was received.

ETPL Exceptions

All exception requests must be approved in writing by the Worksystems contracted WIOA Center services manager.

Exception for Reasonable Accommodation

Participants who experience a disability may be considered for an exception for training that is on the State ETPL (or a state ETPL through a reciprocity agreement – Oregon has reciprocal agreements with Washington, Idaho, and Utah) but is not tied to one of the local area's targeted occupations, when the training and subsequent employment accommodates the participant's needs and goals.

Exception for Trainings on the State ETPL/Not on the WSPM ETPL

Requests will be considered to access a training program that is on the State ETPL (or a state ETPL through a reciprocity agreement) but is not included in the WSPM ETPL, based on an individual participant's situation. A copy of the approval justification is to be maintained with the financial documents along with a copy of the State ETPL depicting the training program (dated).

Consideration of exceptions should be based on supportive information such as local labor market data including employer contacts which indicate a growth industry and in-demand occupations, existence of a hiring commitment and the training provider's placement rates for program completers.

Exception for Trainings not on the State ETPL

Requests will be considered to access a training program that is not on the State ETPL or reciprocal State ETPLs but is aligned with Worksystems target occupations or target industries, based on an individual participant's situation. Procurement is required (see below). The email request and related documentation for this type of exception is sent to the Worksystems WorkSource Center contract manager for review and approval. A copy of the email request and approval is to be maintained with the financial documents along with a copy of a description of the training program from the training provider website.

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Consideration of exceptions will be based on alignment with Worksystems' target occupations and target industries and demonstration that the training provider or training program is certified by the State, an industry board or other governing body and leads to an industry-recognized credential. Approval of exceptions will not require an update to the WSPM ETPL List, though the training provider in question may fill out an application to request inclusion on the State ETPL, and thereby be eligible for migration to the WSPM ETPL List.

Procurement
To pay for an occupational skills training program that is not included on the ETPL, the service provider must make the purchase following their agency procurement policy, which must align with Federal requirements when WIOA or other Federal grants are being utilized. The detailed invoice from the training provider which is equal to or greater than the tuition payment amount is required to be in the fiscal file with the procurement documentation.

Support Services

Support services are financial assistance to offset expenses necessary for a participant to engage in WorkSource activities or to seek or retain employment. Support services are considered payments and do not extend program participation; therefore, every support service should be delivered with an appropriate staff service on the same day (e.g., Career Coaching). Support services may not be provided in Follow-Up.

Prior to considering support service payments, efforts must be made to identify resources in the community or from other grants that may provide the same support and use those available resources first. Processes must be in place at each Center for appropriate referrals to such services as SNAP resources, community-based social services and housing agencies. 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 WorkSource program services.

Prerequisites to Receive Support Services

The participant must be enrolled in the I-Trac fund being used to pay for the support service, the support service must be allowable for that program and the payment is only to be entered in the I-Trac fund being used to fund the support service.

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

- WIOA Registration and Enrollment, or
- Registration and Enrollment in the Discretionary Grant fund paying for the support service.
- Prosperity Planner budget.

The support must be necessary to enable the participant to engage in education, training, job search activities or employment.

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 in the I-Trac fund that is being used to pay for the support service. 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 are required to be filed with the fiscal documentation.

Fiscal Procedures

Each WorkSource Center 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.

Documentation of support service payments is maintained in the financial records attached to the payment record. A copy of the participant's Prosperity Planner budget documenting the participant's financial need must be saved in I-Trac.

Each WorkSource Center 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.

Support Service Definitions

WorkSource Centers 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).

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.

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Child and Dependent Care

Childcare costs are for a child(ren) age 12 and under 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 age 13 or over 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 (including grooming and hygiene products) for interview, 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.

Credit Repair

Credit counseling and other services necessary to assist participants with critical skills related to household budgeting, managing money, accessing a personal credit report, and resolving personal credit problems that will contribute to the participants' work readiness. Credit repair services are to assist the participant to be ready to enter training, job search and/or maintain employment. Whenever possible, community resources should be utilized.

> *Note*: This assistance does not include the payment or modification of a debt.

> *Required Documentation*: The original receipt that reflects an itemization of the services provided and associated cost.

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

To support and contribute to the participant's readiness to enter training, education, or employment, assistance with housing costs may be provided.

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To be considered for housing assistance support, 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 housing payment assistance, and that the participant has a plan for future payments.

Where community resources are available and the participant eligible, those resources must be used before support service payments can be utilized.

Housing Payment
Grant funds may be used to assist with housing payments (current and arrears) that will contribute to the participants' readiness to enter training, education, or employment.

> _Note_: WIOA funds may not be used to pay late fees associated with past-due rent or mortgage payments.
>
> CDBG funds may not be used to pay any mortgage expense.

Required Documentation: Clear verification (copy of rental agreement, mortgage statement, voucher or detailed receipt) of charges due and participant residency is required. For mortgage assistance the participant must be one of the named borrowers/homeowners on the mortgage statement. For rent assistance, 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 or mortgage holder.

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. Payment must be made directly to the education provider.

Moving Costs
Payments for services or items necessary to move into stable housing may be considered and approved. 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, temporary storage unit costs, 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 motel, store or merchant where the purchase was made.

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).

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

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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. Where community resources are available and the participant eligible, those resources must be used before support service payments are utilized.

>
> ***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 and support service should be limited to the minimum required to permit the person to participate in training, job search, accept employment, or maintain employment.

> ***Note***: WIOA funds cannot be used for drug-use testing.

>
> ***Required Documentation***: Co-payments may be reimbursed to the participant and require a receipt from the health care/service provider showing the 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)

Professional Test/License/Organization Fees

When professional licenses/certifications/test/test preparation fees or membership/professional event registration are required or necessary to ensure a participant obtain employment or provides increased access to employment opportunities in the associated sector. Support may include the cost for professional licenses; 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.

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., industrial equipment, stationery, machinery, safety equipment, etc., *may not* be paid for with support services.

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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

Support services are available to provide transportation assistance to participants to allow them to engage in services and activities that support training and education, job search, and/or employment. Transportation types (and associated requirements) include:

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.

Bicycle Purchase

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When a participant chooses and it is determined that the purchase of a bicycle is as, or more, cost effective then other types of transportation assistance, support service funds may be used to purchase a bicycle, including an appropriate bike helmet if the participant does not own one. If appropriate staff may require the participant engage in a bicycle safety class or may purchase a child's helmet or seat if the bicycle transportation is being used to drop children at school or childcare to allow participant to work or attend training, and this cost may also be covered through support service payment.

Service providers should develop a relationship with Community Cycling Center where consultation assistance on the decision and purchase, education and repair options are available (https://communitycyclingcenter.org/) for reasonable costs.

Staff due diligence is required to determine and document:

- Using a bicycle as a means of transportation to and from the participant's job, school or training location is reasonable and, over time, more cost effective and convenient than other forms of transportation. Staff determine reasonableness by evaluating with the participant things like distance, times, work schedule, long-term viability.

- The participant does not currently own a bicycle or have other modes of transportation available.

- The purchase price is reasonable based on some form of price comparison documentation (price quotes, including refurbished when available) for the type of bicycle being purchased.

- The type of bicycle being purchased is appropriate for the intended use (e.g., distance, night riding).

Once purchased no other forms of Transportation assistance may be provided via support services.

Required Documentation: The itemized receipt for the purchase and documentation of price comparisons to support the final selection decision are to be maintained in the financial file. Written attestation from the participant that they are choosing a bicycle for their transportation, they understand they will not be provided with other forms of transportation assistance once a bike is purchased, they do not currently own a bicycle, and justification that a bicycle is a reasonable mode of transportation for the purposes of getting to/from school, training and/or employment is to be maintained in the participant file.

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).

Public Transportation, Car Share, Fuel
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

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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 cell phones 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).

> *Note*: 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.

Needs Related Payments

Needs Related Payments (NRP) provide financial assistance to participants while they are engaged in a Training service. NRPs are limited to the WIOA Adult and Dislocated Worker funding sources unless otherwise noted in the project's regional program standards.

WIOA Adult Eligibility

To be eligible to receive NRPs the participant must be enrolled in the WorkSource Adult grant and:

- Be currently unemployed.
- Not qualify for, or have ceased qualifying for, unemployment compensation.
- Be enrolled in a program of training services under WIOA.

WIOA Dislocated Worker Eligibility

To be eligible to receive NRPs the participant must be enrolled in the WorkSource Dislocated Worker grant and:

- Be currently unemployed.
- Have ceased to qualify for unemployment compensation or Trade Act funding.

- Be enrolled in a program of training services under WIOA by the end of the 13th week after the most recent layoff that resulted in a determination of the worker's eligibility as a dislocated worker, or if later, by the end of the 8th week after the worker is informed that a short-term layoff will exceed six months.
- Be currently unemployed and do not qualify for unemployment compensation or Trade Act funding.

Payments

NRPs will be limited to $245 per week in training. Direct Deposit to the participant's bank account is the preferred payment method; payment by check is allowable and the check endorsement is evidence of participant receipt of NRP.

NRPs have been determined to be non-taxable; therefore, issuance of a 1099 is not required.

Required Documentation: The participant is responsible for providing WorkSource staff with a signed (by instructor) verification of training attendance during the week (with dates noted). Verification may also be in the form of an email from the instructor's email account, or a verification through an online training system of participant login and engagement in the training course (with dates noted). Verification to be maintained with payment documentation.

Stipends

A stipend is a sum of money paid to participants to help cover basic costs while they engage in eligible Portland Metro cohort training. All participants in the single training cohort must receive identical stipends. Stipends may be paid as an hourly amount attached to program engagement or as a total sum based on the length of the training program. There must be clear goals and expectations set forth as to what the participant must do to earn a stipend. Every stipend awarded must have a clear connection to a specific participant goal as documented in their Cohort Training Application.

Cohort training programs that include a stipend will have business processes that comply with these regional program standards requirements and outline and publish the stipend payments available and the requirements for receiving the stipend.

Any participant receiving a stipend must complete a W-9 form. Participants receiving more than $599 in stipend payments will be issued a 1099 for tax reporting purposes.

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 confirmation types are possible for a participant in a virtual training, the participant may provide a screen shot that shows their attendance in the relevant remote classroom. Staff must include a case

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note in the I-Trac record which outlines why the required documentation is not possible and justifies using the screen shot option.

- 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 (see additional details in Support Services – Administrative Requirements). 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. Further stipend payments to the pay card do not require additional signature as it's treated as a direct deposit.

- Stipend payments must be paid from funds during the program year in which the program engagement occurred.

- Stipends are to be entered into the I-Trac Stipend Payments control in the fund being used to pay the stipend.

National Career Readiness Certificate

The Oregon National Career Readiness Certificate (NCRC) is a portable certificate which documents an individuals' career readiness skills. To earn the certificate, individuals are assessed on three foundational workplace skills which have been found to be highly important to most jobs. Those who earn the NCRC receive a portable certificate to verify their skills.

Assessments

The NCRC is comprised of assessments in three areas:

Applied Mathematics

Measures the skill people use when they apply mathematical reasoning, critical thinking and problem-solving techniques to work-related problems.

Reading Workplace Documents

Measures the skill people use when they read and use written text to perform job tasks. The written texts include memos, letters, directions, signs, notices, bulletins, policies and regulations.

Graphic Literacy

Measures the skill people use when they work with workplace graphics, including comparing, summarizing and analyzing information found in charts, graphs, tables, forms, flowcharts, diagrams, floor plans, maps and instrument gauges.

Certificate Awards

Certificates are awarded at four different levels based on the scores of each assessment area:

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- Bronze = Level 3 scores on all assessments
- Silver = Level 4 scores on all assessments
- Gold = Level 5 scores on all assessments
- Platinum = Level 6 scores on all assessments

WSPM NCRC Program Requirements

Practice Testing and Skilling-Up

Individuals interested in taking the NCRC are strongly encouraged to first complete the Initial Skills Review, as it serves as an indicator for potential success on the NCRC. Additionally, the Worldwide Interactive Network courseware provides an opportunity for participants to improve their skills and potentially test at a higher level.

Testing to Earn a Certificate

All three assessments must be successfully completed to earn an NCRC. All three assessments do not need to be completed in a single sitting, but any participant who takes an assessment should attempt the remaining assessments within one year.

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Performance

WIOA Performance Measures

Measure	Calculation Methodology	Performance Cohort (Measurement Period)	Reporting Cohort (Reporting Period)
Employment Rate Q2	**Denominator**: All Adult/Dislocated Worker participants enrolled. **Numerator**: Those employed during the second quarter following the exit quarter.	Q2 after Exit	Q4 after Exit
Employment Rate Q4	**Denominator**: All Adult/Dislocated Worker participants enrolled. **Numerator**: Those employed during the fourth quarter following the exit quarter.	Q4 after Exit	Q6 after Exit
Credential Attainment	**Denominator**: All Adult/Dislocated Worker participants enrolled in an Education or Training Service any time during participation (does not include OJT or Customized Training). **Numerator**: Those that attain a DOL recognized credential between participation date and 1 year after exit date. 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 within one year after exit.	1 Year after Exit	1 Year after Exit
Measurable Skill Gain	**Denominator**: All Adult/Dislocated Worker participants enrolled in a Secondary or Post-Secondary Education or Training Service that leads to a recognized post-secondary credential or employment. **Numerator**: Those that achieve a measurable skill gain. Measurable Skill Gain defined as documented academic, technical, occupational, or other forms of progress towards the credential or employment.	By June 30 for every program year participant engages in a Training or Education Service	Program Year Q4

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Portland Metro Performance Measures

Both Portland Metro and WIOA performance measures apply to all Adult and Dislocated Worker participants as defined below.

Measure	Calculation Methodology	Performance Cohort (Measurement Period)
Aligned Partner Network Participants Engaged in Training Services	**Denominator**: All participants that have a Training, Post-Secondary Education and Employment Skills Service with a Status of Started. **Numerator**: Those participants that are attached to an Aligned Partner Network Partner Agency.	Quarter of Service Start Date
Training Completion Rate	**Denominator**: All participants that have a Training, Post-Secondary Education and Employment Skills Service with an end date (does not include Status of Cancelled). **Numerator**: Those participants with a Service Status of Completed.	Quarter of Service End Date
Training Completers Employment Rate	**Denominator**: All participants that have a Training, Post-Secondary Education and Employment Skills Service with a Status of Completed. **Numerator**: Those that entered employment by Exit to Follow Up.	Quarter of employment Start Date

State of Oregon WorkEx and Competitive Strategies

When a participant is enrolled in WorkEx and/or Competitive Strategies the following performance measures apply.

Measure	Calculation Methodology	Performance and Reporting Cohort (Measurement and Reporting Period)
Training Scholarships or OJT	Number of participants enrolled in a Training, Post-Secondary Education and Employment Skills or Work Based Training-OJT Service with a status of Started.	Quarter of service Start Date
Training Completion Rate	**Denominator**: All participants that have a Training, Post-Secondary Education and Employment Skills or Work Based Training OJT Service with an end date (does not include Status of Cancelled). **Numerator**: Those participants with a Service Status of Completed.	Quarter of service End Date
Training Completer Employment Rate	**Denominator**: All participants that have a Training, Post-Secondary Education and Employment Skills or Work Based Training OJT Service with a Status of Completed. **Numerator**: Those that entered employment by Exit to Follow Up.	Quarter of employment Start Date

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CAREER National Dislocated Worker Grants

When a participant is enrolled in the Career NDWG program the following performance measures apply. For additional details refer to the Career NDWG regional program standards.

Measure	Calculation Methodology	Performance (Measurement Period)	Reporting Cohort (Reporting Period)
Eligible and Enrolled Participants	Number of participants enrolled	Quarter of Participation Date	Quarter of Participation Date
Employment Rate (Q2 after exit)	See WIOA Performance Measures above		
Employment Rate (Q4 after exit)	See WIOA Performance Measures above		
Credential Attainment Rate	See WIOA Performance Measures above		
Measurable Skills Gain Rate	See WIOA Performance Measures above		

JP Morgan Childcare Training (OTCC)

When a participant is enrolled in the Occupational Training and Childcare (OTCC) program the following performance measures apply. For additional details refer to the OTCC regional program standards.

Measure	Calculation Methodology	Performance and Reporting Cohort (Measurement and Reporting Period)
Training Scholarships	Number of participants enrolled in a Training, Post-Secondary Education and Employment Skills Service with a status of Started.	Quarter of service Start Date

Future Ready Oregon & Prosperity 10,000 ARPA

When a participant is enrolled in the Prosperity 10,000 program the following performance measures apply. For additional details refer to the Prosperity 10,000 regional program standards.

Measure	Calculation Methodology	Performance and Reporting Cohort (Measurement and Reporting Period)
Training Scholarships or OJT	Number of participants enrolled in a Training, Post-Secondary Education and Employment Skills or Work Based Training OJT Service with a status of Started	Quarter of service Start Date
Training Scholarships or OJT Women Served	**Denominator**: All participants that have a Training, Post-Secondary Education and Employment Skills or Work Based Training OJT Service with a start date (does not include Status of Cancelled). **Numerator**: Those participants whose gender is identified as a Women in I-Trac.	Quarter of Participation Date
Training Completion Rate	**Denominator**: All participants that have a Training, Post-Secondary Education and Employment Skills or Work Based Training OJT Service with an end date (does not include Status of Cancelled). **Numerator**: Those participants with a Service Status of Completed.	Quarter of service End Date

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Measure	Calculation Methodology	Performance and Reporting Cohort (Measurement and Reporting Period)
Employment Placement	**Denominator**: All P10K enrolled participants not employed at Registration. **Numerator**: Participants that obtain employment by Full Program Exit date in the P10K record.	Quarter of employment Start Date
$17/hr. wage at placement	**Denominator**: All P10K participants placed in employment. **Numerator**: The number earning a wage rate of $17/hour or higher.	Quarter of employment Start Date

Building Careers in Healthcare

When a participant is enrolled in the Building Careers in Healthcare program the following performance measures apply.

Measure	Calculation Methodology	Performance and Reporting Cohort (Measurement and Reporting Period)
Training Scholarships	Number of participants enrolled in a Training, Post-Secondary Education and Employment Skills Service with a status of Started	Quarter of service Start Date
Training Completion Rate	**Denominator**: All participants that have a Training, Post-Secondary Education and Employment Skills or Work Based Training OJT Service with an end date (does not include Status of Cancelled). **Numerator**: Those participants with a Service Status of Completed.	Quarter of service End Date
Training Completers Employment Rate	**Denominator**: All participants that have a Training, Post-Secondary Education and Employment Skills or Work Based Training OJT Service with a Status of Completed. **Numerator**: Those that entered employment by Exit to Follow Up.	Quarter of employment Start Date

Portland Clean Energy Fund

When a participant is enrolled in the Portland Clean Energy Fund (PCEF) program the following performance measures apply. For additional details refer to the PCEF regional program standards.

Measure	Calculation Methodology	Performance and Reporting Cohort (Measurement and Reporting Period)
Training Scholarships or On the Job Training (OJT)	Number of participants enrolled in a Training, Post-Secondary Education and Employment Skills or Work Based Training OJT Service with a status of Started	Quarter of service Start Date

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Measure	Calculation Methodology	Performance and Reporting Cohort (Measurement and Reporting Period)
Training Completion Rate	**Denominator**: All participants that have a Training, Post-Secondary Education and Employment Skills or Work Based Training OJT Service with an end date (does not include Status of Cancelled). **Numerator**: Those participants with a Service Status of Completed.	Quarter of service End Date
Training Completers Employment Rate	**Denominator**: All participants that have a Training, Post-Secondary Education and Employment Skills or Work Based Training OJT Service with a Status of Completed. **Numerator**: Those that entered employment by Exit to Follow Up.	Quarter of employment Start Date

City of Portland American Rescue Plan Act

When a participant is enrolled in the City of Portland American Rescue Plan Act (PDX ARPA) program the following performance measures apply. For additional details refer to the PDX ARPA regional program standards.

Measure	Calculation Methodology	Performance and Reporting Cohort (Measurement and Reporting Period)
Training Scholarships	Number of participants enrolled in a Training, Post-Secondary Education and Employment Skills Service with a status of Started	Quarter of service Start Date
Training Completion Rate	**Denominator**: All participants that have a Training, Post-Secondary Education and Employment Skills Service with an end date (does not include Status of Cancelled). **Numerator**: Those participants with a Service Status of Completed.	Quarter of service End Date
Training Completers Enter Middle Income Employment (defined as training related employment)	**Denominator**: All participants that have a Training, Post-Secondary Education and Employment Skills Service with a Status of Completed. **Numerator**: Those that entered training related employment by Exit to Follow Up.	Quarter of employment Start Date

Additional Performance and Data Guidance

Case Notes

All data entered in the I-Trac system is defined as a case note. Narrative case notes entered should not repeat information already entered into the participant's I-Trac record, but expand upon, provide context to or augment service or employment data, such as noting successes and challenges and progress toward Career Plan goals. Narrative case notes should not include any medical or treatment information, or personal information that is not relevant to their career plan activities.

Credential Definition

In all circumstances a copy of the credential is required to be on file to document the performance.

Credential Type	Additional Definition
High School Diploma	To report in this category the participant must also be employed or in a Post-Secondary Education/Training Program that leads to a recognized post-secondary credential in the year following exit.
GED or High School Equivalency Diploma	To report in this category the participant must also be employed or in a Post-Secondary Education/Training Program that leads to a recognized post-secondary credential in the year following exit.
Associates Degree	
Bachelor's Degree	
Post-Graduate Degree	
Non-DOL Approved Credential	Certificates awarded for Workforce Preparation such as Forklift, Flagger, OSHA, CPR/First Aide.
Other Recognized Diploma, Degree or Certificate	To report in this category the credential must be awarded from an accredited post-secondary institution. (e.g., a 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. (e.g., Microsoft, Apprenticeship, Security Certifications, BOLI certified Pre-Apprenticeship program certificate, BankWork$, CareerWork$ Medical, Guest Services Gold).
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. (e.g., a license from the Oregon State Board of Nursing to be a practicing RN, LPN, CNA; commercial driver's license). Certificates such as OLCC server permit, food handlers or first aid certificates are not within the scope of this definition.

Credential Type	Additional Definition
Occupational Skills Certificate Awarded by an education institution	A Credential awarded by an educational institution based on completion of all requirements for a program of study, including coursework and test or other performance evaluations (e.g. Career Pathways Certificate). Certificates are typically awarded for life (like a degree). Certificates of attendance (e.g., 1 day) or participation in a workforce development activity (e.g. forklift) are not in the definitional scope for these certificates.

Data Entry Requirements

All program information is reported to funders through the I-Trac management information system. To ensure accurate and timely Federal, State and Local reporting, all data is to be entered in the appropriate I-Trac control within five business days of the activity, payment, credential attainment or receipt of employment information.

Employment Characteristics Definitions

Disability
As defined by the American with Disabilities Act: A person who has a physical or mental impairment that substantially limits one or more major life activities. This includes people who have a record of such an impairment, even if they do not currently have a disability, learning disabilities and individuals with a current or previous IEP or 504 plan.

English Language Learner
An individual who has limited ability in reading, writing, speaking or understanding the English language and also meets at least one of the following two conditions: (a) native language is a language other than English or (b) who lives in a family or community environment where a language other than English is the dominant language.

Farmworker
Seasonal Farmworker
An individual who is a low-income individual who: (a) for the 12 consecutive months out of the 24 months prior to application for the program has been primarily employed in an agricultural or fish farming labor that is characterized by chronic unemployment or underemployment, and (b) faces multiple barriers to economic self-sufficiency.

Migrant Farmworker
A Seasonal Farmworker whose agricultural labor requires travel to a job site such that the farmworker is unable to return to a permanent place of residence within the same day.

Foster Care: In Foster Care or Aged out of Foster Care
An individual who is currently in foster care or aged out of foster care. Is not captured or reported for individuals older than 24 years of age.

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Homeless

An individual who:

- Lacks a fixed, regular, and adequate nighttime residence, this includes a person who:
  - (i) is sharing the housing of another person due to loss of housing, economic hardship or a similar reason;
  - (ii) is living in a motel, hotel, trailer park, or campground due to a lack of alternative adequate accommodation;
  - (iii) is living in emergency or transitional shelter;
  - (iv) is abandoned in a hospital; or
  - (v) is awaiting foster care placement.

- Has a primary nighttime residence that is a public or private place not designated for or ordinarily used as a regular sleeping accommodation for human beings, such as a care, park, abandoned building, bus or train station, airport or camping ground.

- Is a migratory child who is preceding 36 months was required to move from one school district to another due to changes in the parent's or parent's spouse's seasonal employment in agriculture, dairy, or fishing work.

- Is under 18 years of age and absents themselves from home or place of legal residence without the permission of their family (i.e., runaway youth).

This definition does not include an individual imprisoned or detained under an Act of Congress or State law. An individual who may be sleeping in a temporary accommodation while away from home should not, as a result of that alone, be recorded as homeless.

Justice System Involvement

An individual who is or has been (a) subject to any stage of the criminal justice process for committing a status offense or delinquent act, or (b) requires assistance in overcoming barriers to employment resulting from a record of arrest or conviction.

Single Parent

An individual who is single, separated, divorced or widowed who has primary responsibility for one or more dependent children under the age of 18 (including pregnant women).

Employment Data Entry

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)

Employment data entry in I-Trac is a two-step process. Enter the first line of Employment Information and then click the add button to enter the second line of information. Hourly Pay, Hours/Week and Benefit information is required to be entered.

Contractor staff are responsible for accurate accounting of earnings, hours and benefits information that informs performance measures. When participants auto-exit and contractor staff learn they became employed, staff should attempt to contact the participant and obtain the employment details.

For the verification to be reported and used in performance tracking, the employment must be confirmed and documented in the Employment Confirmation control in I-Trac. Documentation of employment must be obtained from the participant. Stat UI wage match. 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

An applicant who has completed the WIOA Eligibility and Registration process and has received one WIOA-funded service. For the service to count and trigger participation it must be entered into I-Trac.

Exits

Auto-Exit
When a participant has gone more than 90 days without a WSPM funded service they will be automatically exited. The Exit date is the date of the last WSPM funded service entered in I-Trac. After an Auto-Exit, only follow-up services can be provided.

Exit to Follow-Up
A participant is transitioned to follow-up when program participation goals are achieved. Exit is manually entered in I-Trac, and employment information and confirmation are completed. After Exit only follow-up services can be provided.

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

Global Exclusions Exit Reasons

Participants who find themselves in certain types of circumstances beyond their control and that preclude them from continuing participation may be manually exited from the program. If this type of exit is recorded the participant will not be included in any of the performance measures.

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Reserve Forces-Called to Active Duty: The call to active duty must be for more than 90 days, and a case note is to be entered which documents the information provided by the participant.

Deceased: A case note that documents how staff received notification is required.

Health/Medical: Used when the participant is going for any form of medical treatment that is expected to last more than 90 days. A case note that states how information was received is required. Absolutely no medical details should be included in the participant file or I-Trac case note – just the notification information.

Institutionalized: When a participant 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 services. A case note that states how the information was received by staff is required. Absolutely no medical details or institution name should be included in the participant file or I-Trac case note – just the notification information.

Long-Term Unemployed

Has been unemployed for 27 weeks or longer (I-Trac will calculate and automate this where the customer identifies Last Date Worked is more than 26 weeks ago).

Measurable Skill Gain Definitions

Gain Element	Description	File Documentation
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 (Secondary Education)	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.

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Gain Element	Description	File Documentation
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.
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 Detail
Ensure all Employment and Education or Training placement information is documented in the participant's file and entered in I-Trac within 5 business days of receiving the information, including Employment Confirmations. 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 quarterly to ensure that denominator and numerator cohorts are accurate. Data is to be entered within 5 business days of receiving the information.

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Quality Job Standards

A quality job helps workers achieve economic stability and mobility, while prioritizing diversity and worker voice. The Quality Job Standards below should be incorporated into to career planning discussions with participants:

- **Self-Sufficiency Wages**: A quality job provides sufficient income to afford a decent standard of living. For example, jobs that offer pay consistent with published self-sufficiency standards that consider family composition and cost of living.

- **Safe Working Conditions/Worker Engagement**: A quality job offers employees dignity and respect and welcomes engagement in workplace operations. For example, quality jobs uphold and enforce anti-harassment and anti-discrimination policies and provide reasonable accommodation to employees with disabilities.

- **Predictable Hours:** A quality job offers employees predictability on the number of hours they are offered per week to minimize hardship on employees and their families.

- **Comprehensive Benefits**: A quality job provides basic benefits that increase economic security, improve health and overall well-being. Quality jobs include healthcare, childcare, transportation, wellness programs and access to retirement savings programs, among other supports.

- **Accessible Hiring and Onboarding Practices**: A quality job offers transparent and accessible hiring and onboarding practices to ensure that employer and employee are set for success.

- **Training and Advancement Opportunities**: A quality job provides opportunities to build skills and access new roles and responsibilities in a workplace. For example, quality jobs offer internal pathways to support career progression and professional development opportunities.

The Quality Jobs Framework and Quality Job Standards should be utilized keeping in mind each program participant's unique career goals, education goals, and circumstances while developing an individualized career plan. The Framework should be used by career coaches to inform and facilitate discussions when exploring career path options and evaluating employment opportunities.

Situations may arise in which an employment opportunity does not meet all or only meets some of the quality job standards. Worksystems recognizes that getting on a pathway to a quality job is, at times, a necessary first step toward the attainment of a quality job. Supporting program participants while they remain on their career journey toward a quality job is the primary goal of a Career Coach when it comes to advancing quality jobs, and coaching job seekers in how to recognize a quality job is the key to accomplishing that goal. In the Follow-up phase, career coaches may support participants in refining the middle and longer-term goals in their career plans.

Underemployed

An applicant who meets any one of the following:

- Is employed less than full-time and is seeking full-time employment.
- Is employed in a position that is inadequate with respect to their skills and training.
- Is employed but their annual Family income does not exceed the higher of the poverty line or 70 percent of the LLSIL.

- Is employed but their current job's earnings are not sufficient compared to their job's earnings from previous employment.

I-Trac Data Entry and File Documentation

Performance Element	I-Trac Data Entry Fields	File Documentation
Program Application	A completed and signed WSPM program Application is required. The application is developed from the participant registration data entered in I-Trac. Obtain an eSignature through I-Trac or print the Application from the Customer Documents link once all Registration data is entered and upload to I-Trac.	I-Trac: Customer documents
Aligned Partner Network Participants Engaged in Training Services	If the participant does not have an active partner fund enrollment, complete the Other Tag Control on the Services Tab	N/A
Training Completers	Services Tab • Secondary Education & Skills Control or Training, Post-Secondary Education & Employment Skills Control. • Training end date must be the completion of Training program not a term of the Training.	Participant File ITA Application
Training Completers Employment Rate	Services Tab • Secondary Education & Skills Control or Training, Post-Secondary Education & Employment Skills Control • Training end date must be the completion of Training program not a term of the Training. Outcomes Tab • Employment Information Control. • Employment Confirmation Control.	N/A

Performance Element	I-Trac Data Entry Fields	File Documentation
Employment Rate Q2 and Q4	Outcome Tab • Employment Information Control • Employment Confirmation Control	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. • Employment Leave and Earnings Statements • Employment Verification Letter on Letterhead • Follow-up Survey (Signed) • Income Tax Records • Pay Stub • Payroll Slip • Quarterly Tax Payment Forms • Sales Commission Worksheet • State Department of Revenue or Taxation Record • W-2 Form • UI Crossmatch
Credential Attainment	Services Tab • Secondary Education & Skills Control or Training, Post-Secondary Education & Employment Skills Control Outcome Tab • Credentials Control	I-Trac: Copy of Credential uploaded to Customer Documents
Measurable Skill Gains	Assessment Tab • Measurable Skills Gains Control	See above Measurable Skill Gain Definitions I-Trac: Copy of allowable document uploaded to Customer Documents

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Criminal Background Requirements

P10K providers must verify that each of the provider's employees and volunteers and subcontractor employees and volunteers (referred to in these regional program standards as Affected Employees and Volunteers), as a condition of working directly with P10K participants, has not been convicted of any of the following crimes:

- Child or elder abuse
- Offenses against persons
- Sexual offenses
- Child neglect
- Any other offense bearing a substantial relation to the employee/volunteer's qualifications, functions or duties

Offenses against persons means crimes that have as an element the use, attempted use or threatened use of physical force or other abuse of a person and includes, but is not limited to, homicide; assault; kidnapping; false imprisonment; reckless endangerment; robbery; rape; sexual assault, molestation, exploitation, contact, or prostitution; and other sexual offenses.

"Substantial relation" means the crime for which the person has been convicted of involves conduct by the person that relates to the functions the person may perform for the Contractor or places the person in a position to gain access to a participant or a participant's personal information to place the employee/volunteer in a position to cause harm to the participant. An example – a person who has been convicted of fraud may not be permitted to work in a position that might allow them access to confidential personally identifiable information (PII) such as social security number and date of birth.

Affected Employees and Volunteers

Employees/Volunteers that directly provide P10K services or manage a P10K program including but not limited to:

- Direct service staff (may include but is not limited to Career Coaches, Pre-apprenticeship Training Program Instructors).

- Managers of P10K programs/employees.

- Contractor volunteers that provide P10K services to P10K program enrolled participants.

Allowable Background Reports

One of these required and allowable background report types are to be completed prior to the new employee or volunteer providing P10K services to P10K enrolled participants:

- Fingerprint-based national criminal records check from a local Oregon State Police office.

- Fingerprint-based background check provided within the last two years, by a Federal or State of Oregon agency, to demonstrate the employee or volunteer's fitness to provide services under the P10K contract.

- Third-party vendor accredited by the Professional Background Screeners Association. The third-party vendor must provide a national criminal records report that includes review of criminal

history from each state the individual has lived, studied or worked in and the National Sex Offender Public Website.

Criminal Background Check Policy

Contractors must develop a criminal background check policy that includes:

- Securing an allowable criminal background check utilizing one of the Allowable Background Reports listed above.

- Review of the criminal background check to determine if the background includes any of the above-listed crimes.

- If the background includes one of the above listed crimes a review of the following to determine if the applicant/volunteer's background possess a risk to working safely with P10K participants:

  o The severity and nature of the crime.
  o The number of criminal offenses.
  o The time elapsed since commission of the crime.
  o The circumstances surrounding the crime.
  o The subject individual's participation in counseling, therapy, education or employment evidencing rehabilitation or a change in behavior; and
  o The police or arrest report confirming the subject individual's explanation of the crime.

If a decision to hire is made when the applicant/volunteer has a criminal background, a written justification to hire must be completed and maintained in the personnel file. The written justification must outline the reasons for allowing the applicant/volunteer to be hired into the role and perform P10K services. The reasons must address how the applicant/volunteer is presently suitable or able to work with P10K participants in a safe and trustworthy manner.

Criminal Background Check Procedures

1. Prior to hire, secure one of the Allowable Background Reports on the applicant/potential volunteer. An applicant/potential volunteer may not be placed in a position working with P10K enrolled participants until the full background check process has been completed.

2. Determine if any of the convictions listed in the Background Requirements are on the report.

3. If yes – the Contractor determines if they want to hire the applicant/volunteer into the Affected Employees/Volunteer position.

   o Where the decision to hire is No – nothing more is required.

   o Where the decision to hire is Yes – the Contractor must complete a written justification on the Worksystems *State New Background Justification Form* outlining the reasons for allowing the applicant/volunteer to be hired into the role and perform P10K services. The State New Background Justification Form can be found on the Knowledge Base.

   o The State New Background Justification Form and a copy of the background report must be placed in the employee/volunteer personnel file.

   o Contractor will support all Worksystems annual program monitoring activities on compliance with these criminal background check procedures.