

Regional Program Standards

Focus: WorkSource Centers Youth Program Services
 Other: Economic Opportunity Programs

Topic: Economic Opportunity Programs

Date: December 4, 2023

New Revised

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Overview

The Economic Opportunity Programs (EOP) are a suite of program services offered through community-based organizations and built on the career coaching model that systemically ties long-term, relationship-based career coaching for workforce preparation and training to employment resources delivered through WorkSource Portland Metro (WSPM) – the region’s publicly-funded workforce development system.

These regional program standards include information about the standard programs; where there are programs designed to serve specific target industries and/or populations there may be additional regional program standards to outline the specifics of that program. Programs may operate under multiple regional program standards concurrently, depending on the projects’ structure.

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Economic Opportunity Program Options

Portland EOP

Portland EOP services are designed to propel low-income people out of poverty. As projects of the EOP, Portland EOP follows all EOP Regional Program Standards except as noted below. There are two Portland EOP projects:

Career Coaching

The Portland EOP project systematically ties long-term, relationship-based Career Coaching to workforce preparation, training, and employment resources delivered through WSPM, focused on career planning and job search assistance.

Industry-Specific Vocational Training (ISVT)

There are two training projects within Portland EOP that include both Career Coaching and ISVT services.

- **Construction:** Pre-Apprenticeship Program services are offered through Oregon Tradeswomen, Inc. and Constructing Hope.
- **Healthcare:** Training in the Healthcare industry is available through Immigrant and Refugee Community Organization (IRCO).

A Home for Everyone EOP

The A Home for Everyone (AHFE) EOP project systematically ties long-term, relationship-based Career Coaching to workforce preparation, training, and employment resources delivered through WSPM, focusing on housing stability, career planning and job search assistance. AHFE EOP is part of the Joint Office of Homeless Services' larger A Home for Everyone initiative, which is a community-wide effort to house homeless Multnomah County citizens. The AHFE EOP project follows all EOP Program Regional Program Standards except as noted below.

Washington County EOP

The Washington County EOP is a suite of services exclusively for residents of Washington County and is built on the career coaching model. The program systemically ties long-term, relationship-based career coaching for workforce preparation and training to employment resources delivered through WSPM focused on career planning and job search assistance. As a project of the EOP, the Washington County EOP follows all EOP Program Regional Program Standards except as noted below.

Department of Community Justice EOP

The Department of Community Justice (DCJ) EOP program offers career coaching towards workforce preparation, skills training and employment resources delivered through WSPM. The DCJ EOP is a partnership with Multnomah County Department of Community Justice to provide EOP services and resources to eligible participants on probation or in justice diversion programs. The DCJ EOP project follows all EOP Program Regional Program Standards except as noted below.

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Eligibility

To participate in EOP a participant must:

- Meet standard EOP eligibility requirements and any additional eligibility requirements of the specific EOP project.
- Complete Workforce Innovation and Opportunity Act (WIOA) program enrollment, including WIOA Adult Documentation.

Standard EOP Eligibility Requirements

Low Income

The participant's total household income for the six-months prior to eligibility determination cannot exceed 50% of the [Median Family Income \(MFI\) for Portland Metropolitan Statistical Area](#) for the participant's household size. Household is defined as individuals who reside in the home and form one economic unit for purposes of tenancy or homeownership, regardless of whether they are legally related.

Income is calculated and documented using the I-Trac Six Month Income control and customer attestation of the information on the signed program Application.

Age

Participants must be age 18 or over.

WIOA Adult Eligibility

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

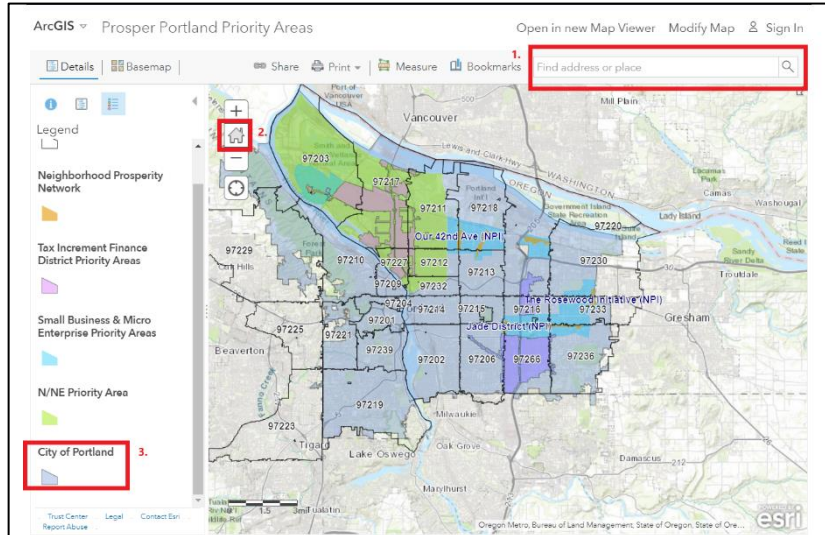
Portland EOP Eligibility

In addition to the standard EOP eligibility requirements, the Portland EOP projects have the following eligibility requirements.

Residency

All participants must reside within the city limits of Portland or within Multnomah County. Staff must look up the residence address provided by the participant in the City of Portland's ArcGIS map (link at <http://bit.ly/M6nyjQ>) to verify this requirement.

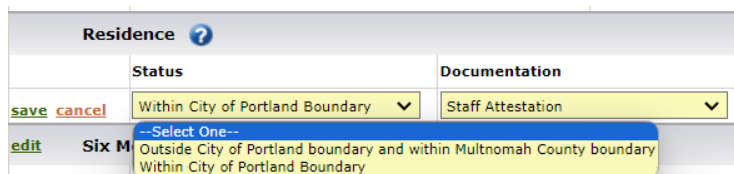
Input the address in the search bar (point 1. on graphic) and click the ‘search’ icon. The map will focus down to the actual street location. Once at the street location click the ‘home’ icon (point 2. on the graphic) to expand back out. If the address is within the blue/gray area outline it is within the City Boundary (point 3. on the graphic).



Staff attest to having verified the address via the documentation dropdown selection in the Residence control in I-Trac.

Within Portland EOP there is a 90% required enrollment of participants who reside inside the City of Portland boundary with up to 10% of enrolled participants residing outside the City of Portland boundary but within Multnomah County. Utilize the Tax District and Map Viewer map (link to map: [Tax District and Map Viewer \(arcgis.com\)](https://arcgis.com)) to verify a Multnomah County address. Approval from Worksystems is required to enroll a Participant who lives outside the City of Portland but within Multnomah County.

This is documented as staff attestation in the Residence Control in I-Trac on the Registration Tab.



A Home for Everyone EOP Eligibility

In addition to standard EOP eligibility requirements, the AHFE EOP has the following eligibility requirements.

Low Income

The participant’s total household income for the 6 months prior to eligibility determination cannot exceed 50% of the Median Family Income for Multnomah County for the participant’s household size. Further, priority is to be given to households at 30% Median Family Income or below (refer to contract statement of work for specific participant enrollment goals).

Residency

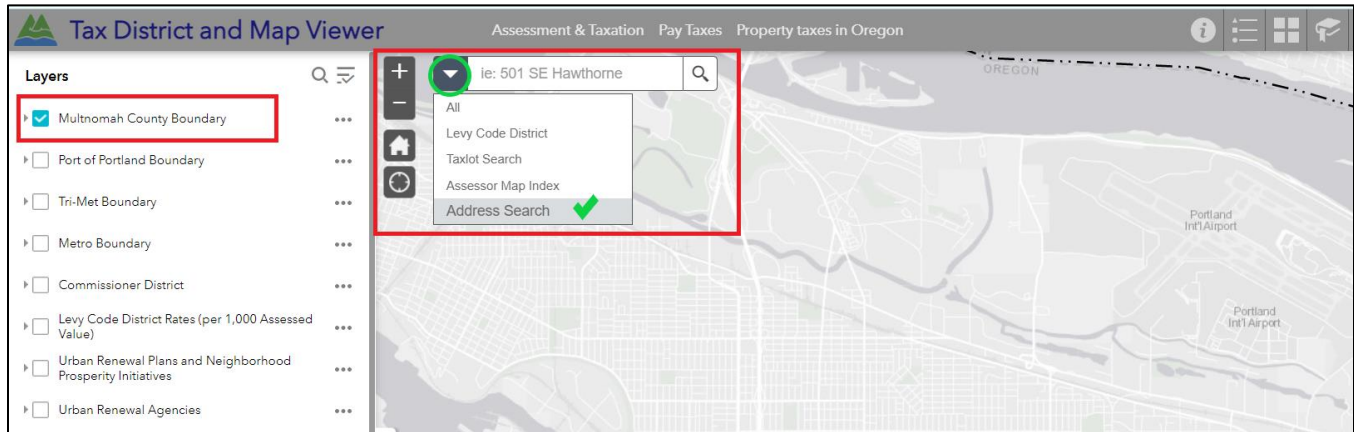
All AHFE EOP participants must reside within Multnomah County. Where the participant does not have a resident address, the address of the service agency may be used to meet this requirement (and it must be within Multnomah County). To verify a Multnomah County address staff must look up the residence address provided by the participant in the Tax District and Map Viewer map (link to map: [Tax District and Map Viewer \(arcgis.com\)](https://arcgis.com) – see next page for map detail).

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Residency is documented as staff attestation in the Residence Control in I-Trac on the Registration Tab.

Housing Status

Participants must be either:

- Homeless or imminently at risk of becoming homeless.
- Formerly homeless and are currently engaged in the continuum of services stabilizing housing.

Housing Status is documented as staff attestation by completing the Joint Office of Homeless Services Household Level Attestation: Experiencing or at Imminent Risk of Long-Term Homelessness (A/B) form, and in I-Trac using the AHFE Registration control.

AHFE Homeless Definition

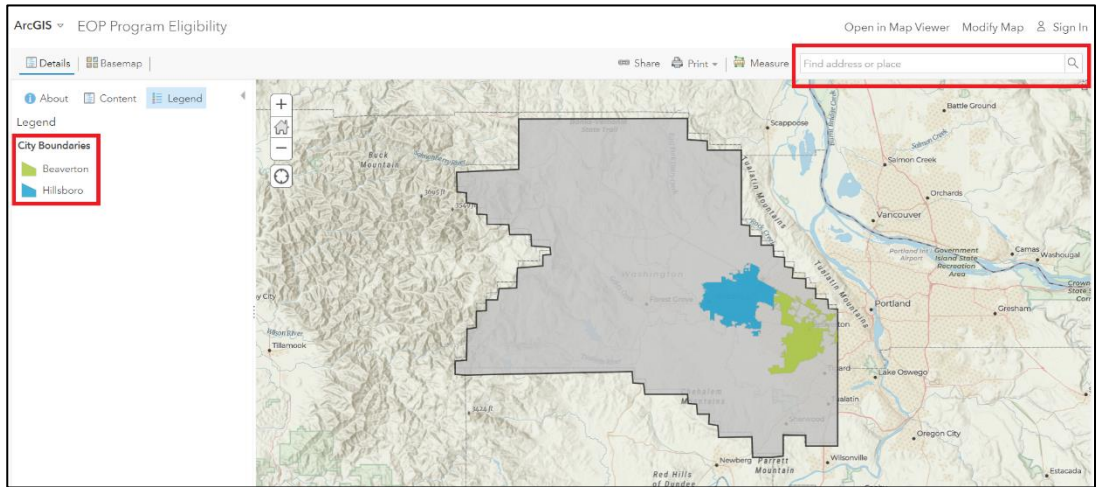
The participant is the Head of Household and is applying for homeless services and at substantial risk of homelessness and/or is experiencing any form of homelessness. Head of Household currently meets at least one of the following criteria:

- Fleeing or attempting to flee domestic violence. Includes dating violence, sexual assault, stalking, trafficking or other dangerous or life-threatening conditions that relate to violence and lacks the resources or support networks to obtain other safe, permanent housing.
- Housed through another Homeless Assistance Housing Program during the past three years and is not currently being served in that program.
- In an institution or publicly funded system of care. For example, hospital, jail, prison or foster care.
- Literally Homeless. Is staying in a tent, car, emergency shelter, transitional housing or hotel.
- In housing and will become Literally Homeless within 14 days of the AHFE application and/or has received an eviction notice (this includes households that are involuntarily doubled up).
- Has been literally homeless, institutionalized in a publicly funded system of care and/or involuntarily doubled up for a combined total of 12 or more months over the past three years.
- Is being served in an intensive case management program. For example, Assertive Community Treatment.

Washington County EOP Eligibility

Funding sources that support the Washington County EOP program include Washington County CDBG, Washington County General – Construction and Washington County General. Washington County EOP contractors will make enrollment decisions based on the funding type and follow the residence eligibility requirements of that funding type outlined below to determine participant eligibility.

Residence verification is conducted utilizing this link to the [Washington County Residence Map](#); insert the address where indicated to verify it is within the required boundaries for the selected funding type.



Residency is documented as staff attestation in the Residence Control in I-Trac on the Registration Tab.

Residence							
	<table border="1"> <thead> <tr> <th>Status</th> <th>Documentation</th> </tr> </thead> <tbody> <tr> <td> <input type="button" value="save"/> <input type="button" value="cancel"/> Within Washington County Boundar --Select One-- </td> <td> Staff Attestation </td> </tr> <tr> <td> <input type="button" value="edit"/> Ethnicity Outside Washington County Boundary Within Washington County Boundary </td> <td> Race </td> </tr> </tbody> </table>	Status	Documentation	<input type="button" value="save"/> <input type="button" value="cancel"/> Within Washington County Boundar --Select One--	Staff Attestation	<input type="button" value="edit"/> Ethnicity Outside Washington County Boundary Within Washington County Boundary	Race
Status	Documentation						
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<input type="button" value="edit"/> Ethnicity Outside Washington County Boundary Within Washington County Boundary	Race						

- **Washington County CDBG:** Residence is within Washington County and is outside of the cities of Beaverton and Hillsboro.
- **Washington County General – Construction:** Residence is within the City of Beaverton or the City of Hillsboro, and the participant is pursuing construction training.
- **Washington County General:** Residence is within the City of Beaverton or the City of Hillsboro, and the participant is not pursuing construction training.

Department of Community Justice EOP Eligibility

In addition to standard EOP eligibility requirements, the DCJ EOP has the following eligibility requirements: All DCJ EOP participants must be referred by the Multnomah County Department of Community Justice. Document with the referral form/email from DCJ in the participant file.

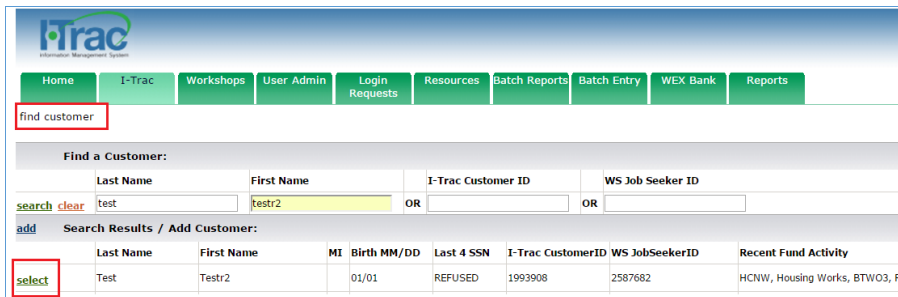
Eligibility Process

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.

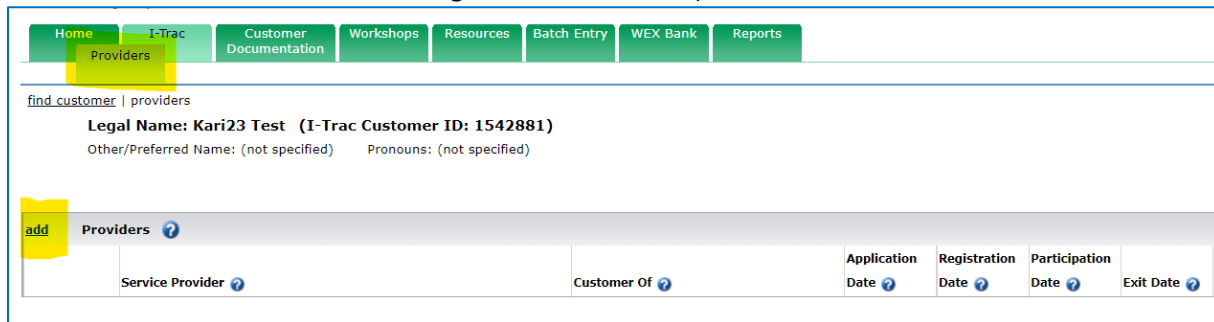
If the customer is not in I-Trac or does not have a Job Seeker ID, the customer must begin registration by completing WOMIS Registration. Once the WOMIS registration record comes into I-Trac, move to Step 2 below.



Step 2: Add WIOA Enrollment

The Economic Opportunity Program may only enroll customers in WorkSource WIOA Adult.

- On the Providers Tab choose “add” Adult-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 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.

Step 3: Complete WIOA Documentation Control

To enroll into the WIOA Adult, 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.

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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.

WIOA 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

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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)
<ol style="list-style-type: none"> 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 	<ol style="list-style-type: none"> 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	<ul style="list-style-type: none"> • Download the Selective Service Registration Acknowledgement Letter from https://www.sss.gov/verify/ • Selective Service Registration Card • Stamped Post Office Receipt of Registration

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IF Requirement is	AND Registration Status is	Then Documentation Types must be one of the following
	Not Registered: Applicant was unaware of the requirement to register and is now age 26 or older.	<ul style="list-style-type: none"> 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	<ul style="list-style-type: none"> 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.

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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:

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.

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- 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
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):

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- **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.

Step 4: EOP Eligibility Determination and Documentation**Low Income**

When determining low income for eligibility, these types are excluded from the calculation:

- Unemployment insurance payments.
- Child support.
- Public assistance benefits (SNAP, TANF).
- Social Security old-age and survivors' insurance benefits.

Participant attestation of the accuracy of the income information reported is their signature on the Application for services.

Select EOP Option

Select the EOP Option in which the participant will be enrolled and document the additional eligibility requirement(s) of that program.

Required Disclosures

Provide and discuss the social security number (SSN) disclosure and the grievance and equal opportunity rights disclosure to ensure the applicant understands their rights. The participant will acknowledge receipt of these disclosures when they sign the Application. No copies of the forms need be maintained in the customer file.

Social Security Number (SSN) Disclosure

A participant's SSN is required for their inclusion in some performance cohorts. Participants must be provided the disclosure (Standard SSN 2018-03-01) that describes how their SSN will be used and the program's commitment to confidentiality. Where the participant agrees to the use of their SSN for reporting purposes, the indication is noted through I-Trac on the Application for Services and the consent is the participant's signature on the application.

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EEO/Grievance Disclosure

The Equal Opportunity Statement and Grievance Procedure (October 2017) is to be given to the participant during the eligibility determination interview meeting. Reasonable efforts should be made to assure that the information and complaint procedures are understood by potential participants.

Enrolled Participant

Obtain applicant signature utilizing the eSignature process in I-Trac. If an eSignature is unable to be obtained print the application from the I-Trac Customer Documents menu for signature and upload to I-Trac. Once all elements of eligibility determination and registration have been completed, the applicant must begin participation in program services within 45 days of the registration date. Participation begins with the first PCEF in-program phase service entered into I-Trac.

Ineligible Customers

Applicants who do not meet the EOP eligibility requirements for enrollment are to be referred to other programs in the local area that may be available to provide similar services. WorkSource Center services must be reviewed and discussed, with a direct referral to the WorkSource Center most convenient for the applicant and the link to MyWorkSource for additional service options provided. Formal referrals to community organizations are not required.

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

Transferring Participants

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

- Confirm in writing from the participant that they agree to the transfer and document the agreement and reason for transfer through a case note in I-Trac.
- Obtain approval from the current EOP Program Manager and the EOP Program Manager at the service provider the participant is transferring to. This is documented in the transfer record in I-Trac on the Outcomes Tab.
- Upload to I-Trac all eligibility and performance documentation obtained prior to the transfer date.
- Enter a transfer record on the Outcomes Tab in the EOP I-Trac record.

All eligibility documentation for the EOP 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.

Program Design and Service Delivery

Service delivery and the subsequent performance will happen during two distinct program phases: In-Program Services and Follow-Up Services. Refer to the section Service Definitions in these regional program standards for additional detail.

In-Program Services

During In-Program services participants receive career coaching designed to support them in overcoming barriers to employment and achieve their employment and career goals. Services occur from the point of EOP eligibility and enrollment until a participant obtains employment that meets their career plan goals and they are assessed as ready to transition to Follow-Up services. In-Program services will also cease when 90 days have elapsed without a service being provided and documented in I-Trac, and the participant will be automatically moved to Follow-Up. The transition date (Exit Date) is always the date of the last In-Program service.

Follow-Up Services

Follow-Up services are designed to assist participants in stabilizing their employment, identify employment advancement opportunities and/or secure new employment that is in line with their career plan. Follow-Up begins at the point of transition from In-Program Services (exit) and the services will continue for a period of one year. Employment information and confirmations are tracked during Follow-Up.

Service Definitions

Career Coaching – Standard

Typically delivered as an individualized service, Career Coaching is relationship-based guidance and coaching dedicated to increasing the self-sufficiency of participants through unsubsidized employment. It includes assessment of employment-related skills, identification of achievable career and training goals, and development of an achievable career plan (see Career and Resource Plan Development). Career Coaches support participants in execution of the plan and attainment of their goals by building a relationship of support and accountability. Best practices show that participants who maintain periodic communication with a Career Coach are most likely to benefit from services.

Elements of Career Coaching include:

- 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.

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- Coach participants in job search activities, 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.
- Assist participants to access rent assistance resources to support their employment and career plan.

Another element of Career Coaching is conducting Career Planning Sessions – refer to Career and Resource Plan Development for more detail.

Career Coaching –Industry Specific Vocational Training (ISVT)

In addition to standard career coaching that uses the elements outlined above, certain EOP projects provide career coaching with an occupational focus that includes orientation to industry specific occupations, referrals to tutoring and basic skills remediation needed to enter certain occupational training, and intensive support towards success in that training. Occupational Career Coaching may be provided when a participant is enrolled in an occupational-specific program. See Portland EOP – Additional Services section below for additional details.

Career Coaching – Dual Coaches

Dual enrollment between EOP programs (Portland EOP, DCJ EOP, AHFE EOP and Washington County EOP) is not allowed. However, dual enrollment with the industry-specific programs that include ISVT, Portland Clean Energy Fund (PCEF) and Community Construction Training Programs (CCTP) is allowed.

EOP participants may simultaneously receive Standard Career Coaching and Industry Specific Coaching services when they express interest and are assessed as ready to participate through multiple programs designed to support their industry-specific training completion. Prior to dual coaching, participants must meet the eligibility requirements and be fully enrolled in all the grant-funded programs from which they are receiving services.

To ensure participants meet their employment and training goals both Career Coaches must:

- Define, review, and inform participant of their individual roles.
- Coordinate, review, and regularly update participant's Career Plan. The Career Plan must be shared with all the participant's coaches after each revision using the secure communication method (I-Trac file exchange functionality).
- Coordinate participant's access to all services and resources available through all programs.
- Establish and maintain regular communication regarding participant progress. Communication must be case noted in I-Trac within five business days.

Career coaching is provided during both In Program and Follow-Up services.

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Career Mapping

This workshop is the first step of the career mapping process. Participants identify their strengths, gifts, capacities, and qualities that will enable them to be successful in the work environment and potential jobs. After the workshop, the Career Coach meets individually with participants to create a Career and Resource Plan that articulates these goals, identifies resources and outlines next steps. Refer to the Career Mapping Manual for additional information and detail.

Career and Resource Planning

The Career and Resource Plan is to be completed within the first 90 days of program participation and is developed with each participant using the Career Mapping process. The Plan documents career interests, strengths and challenges, short- and long-term education and employment goals and the steps and supports needed to meet these goals.

Prior to Plan development, appropriate assessments should be conducted to provide critical information about the participant's career goals, interests, aptitudes, basic academic skill level, occupational skills, work history, work and college readiness, attributes, personal strengths, developmental needs, and support service needs. The analysis and application of this assessment information is critical to guiding and coaching the participant and assisting them to develop a realistic Plan to reach their career goals. During In-Program Services, the Plan should be reviewed and updated at least every 180 days as the participant completes (or is unable to complete) activities as planned and should drive program participation.

Additionally, assisting the participant in creating a Prosperity Planner budget is an element of the Career Plan. This will help inform them on the type of salary they need to become self-sufficient, as well as provide the budget back-up for any support services necessary to assist them through their service and training activities.

The Plan is a dynamic document that will change as the participant is provided opportunities to explore optional careers of interest, through meetings in which the participant receives advice and guidance and through a variety of work and community-based experiences exploring a range of occupational areas. The plan should be developed as a professional collaboration between the participant and Career Coach.

Job Search Assistance

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

Portland EOP Additional Services

In addition to the services outlined above, the following services are available to Industry-Specific Vocational Training participants.

Occupational Skills Training (ISVT Only)

The training must be 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. The training service is entered directly into the EOP I-Trac record.

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Occupational Skills Training must:

- Be instructor-led in either an in-person or virtual format.
- Be outcome-oriented and focused on an occupational goal specified in the Training Plan.
- Be of sufficient duration to impart the skills needed to meet the occupational goal.
- Lead to the attainment of a recognized, DOL-defined credential.

Pre-Apprenticeship Program (ISVT Only)

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. The service is entered directly into the EOP I-Trac record.

Tutoring (ISVT Only)

Services that focus on providing academic or occupational skills training support, helping a participant identify areas of academic concern, assisting in overcoming learning obstacles, and providing tools and resources to develop learning strategies. Tutoring should be structured to lead to training completion or credential attainment.

A Home for Everyone EOP Additional Services

In addition to the services outlined above, the following service is available to AHFE EOP participants.

Housing Stability Case Management

Guidance and coaching dedicated to increasing the housing stability of the participant. This may include assessment of housing situation, referrals to rent assistance, housing supports or rent-well classes (whether through AHFE funding or other resources), help searching for housing or other activities that are intended to increase the participant's likelihood of finding and maintaining stable housing. Housing stability and career coaching should be complementary. A career coach may help the participant consider housing characteristics such as proximity to training or employment and housing affordability in relation to current and future employment.

Training Services

Training services may be needed when a participant requires new or upgraded skills to secure, retain or advance in employment in a demand occupation or growth industry that provides a career path leading to economic self-sufficiency. Worksystems invests training resources to prepare people for in-demand occupations in the following target industries: Manufacturing, Construction, Healthcare, and Technology.

The EOP program may refer participants to training programs while they are receiving In-Program services (not available as a Follow-Up service or payment). The Portland EOP ISVT projects that include a training element may pay for training directly with their grant funds. All other EOP providers must refer a participant to WSPM to fund any type of training service. Unless specifically allowed for in the program design, EOP service providers may not pay for trainings with EOP contracted Worksystems funds. Training services that are funded by WorkSource Portland Metro are entered into the participant's WSPM Adult/DW record by WorkSource staff and

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copied into EOP records. Training that is funded directly by Portland EOP ISVT providers or by sources other than WSPM are entered directly into the EOP record by EOP Career Coaches.

There are three categories of training services offered through the WSPM system – Classroom, Cohort and Work Based Training. Services provided through the WSPM Centers are to be coordinated with Center staff. Please refer to the WorkSource Portland Metro regional program standards for detailed information, policy and procedures related to Training services.

Classroom and Cohort Training

The training program must either be on the Portland Metro Eligible Training Provider List (refer to WorkSource Portland Metro regional program standards for additional information), or the training must have been procured for following Worksystems' procurement policy. The training may be offered through a school or training organization on a per-student basis or offered through a cohort agreement with Worksystems.

Occupational Skills Training

The training must be 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 instructor-led in either an in-person or virtual format.
- Be outcome-oriented and focused on an occupational goal specified in the Training Plan.
- Be of sufficient duration to impart the skills needed to meet the occupational goal.
- Lead to the attainment of a recognized, DOL-defined credential.

Pre-Apprenticeship 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.

Prerequisite Training

Any class or training that is required by the training provider prior to enrolling into a training program represented on the Eligible Training Provider List (ETPL). This excludes activities defined under Workforce Preparation. The training program must be on the WSPM ETPL and must indicate the prerequisite course is required for entry into the training program.

Workforce Preparation

Activities, programs or services designed to help an individual acquire any combination of the skills necessary for the 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-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 and Credential performance.

Work Based Training

On the Job Training (OJT)

An agreement between the WorkSource program and an individual 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, 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.

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 Work Experience (WEX) services are funded through the PDX Metro Works program. Please refer to the PDX Metro Works regional program standards for policy and procedures related to work experience services.

Administrative Rules

WEX services are to be:

- No more than 40 hours per week (no overtime).
- A maximum of 300 hours for the total WEX training.
- Paid at 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 the WorkSource Liaison.
- The participant meets with the WorkSource Liaison who will assess readiness for a WEX service and, if accepted, will submit the resume to the WEX Specialist.
- The participant completes a screening with the WEX Specialist.
- 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.

A Work Experience service does not count towards EOP Contract performance for Training Starts.

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Eligible Training Provider List

The statewide roster of training programs and providers that are specifically certified to meet the requirements of WIOA. The Local Workforce Development Board establishes a WSPM ETPL that is a subset of the State's ETPL, and lists training programs directly linked to in-demand occupations in the local area that provide a career path leading toward self-sufficiency. All training funded through WSPM must be on the WSPM ETPL. Refer to WSPM Regional Program Standards for more information.

Tuition Payments

Applies only to Portland EOP ISVT projects that include Training funding. Service providers may directly pay for training and must make the purchase following their agency procurement policy. The detailed invoice from the training provider which is equal to or greater than the tuition payment amount is required to be in the fiscal file.

Training Completer

A participant who completes a planned program of training with a "complete" or "pass" designation from the school (for pass/no pass programs) or a passing grade (defined as D or better). Training completion must be reflected in the I-Trac record.

Support Services

Overview

Support services are financial assistance to offset expenses necessary for a participant to engage in program activities or to seek or retain employment. Prior to considering support service payments, efforts must be made to identify resources in the community or from other grant resources that may provide the same support and use those available resources first. Processes must be in place at each site for appropriate referrals to such services as food stamps, 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 EOP services.

Support services are considered payments and do not extend program participation during In-Program services; therefore, every In-Program support service should be delivered with an appropriate staff service on the same day (e.g., Career Coaching). EOP grant-funded support services (Mult.Co. AHFE; Mult.Co. DCJ; P10K; Prosper Portland GF and CDBG; Reinvestment; Wash.Co. GF and CDBG) are available during both In-Program and Follow-Up services unless otherwise noted in grant-specific Regional Program Standards. WIOA grant-funded support services are only allowed in In-Program services and are not allowed in Follow-Up.

Prerequisites

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

- Enrolled in the EOP program.
- A completed Prosperity Planner budget saved to I-Trac record that supports need.

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

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Administrative Requirements

Documentation

All support services are to be tracked in the participant's I-Trac record on the Payments Tab in the support services control. When a support service is paid directly to the participant a signature that acknowledges receipt of the support payment must be on file with the back-up payment documentation noted below in Support Service Definitions.

Note: Direct deposit into an account in the participant's name and the endorsement on a cancelled check are both allowable documentation of this requirement. Direct deposit information must be received directly from the participant with approval to deposit support service payments to the account.

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

Fiscal Procedures

Each contractor 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 customer's Prosperity Planner enrollment budget documenting the participant's financial need must be saved in I-Trac.

Each contractor must establish and follow a process for reconciling pre-purchased support services (e.g., bus passes, pre-paid gas cards, retail store vouchers). 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.

Note: Support service purchases administered with pre-purchased (gift) cards must be allowable under the Federal Cost Principles (unless specifically allowed for by a specific grant, which allowability will be outlined in the Regional Program Standards for the grant).

Support service payments/reimbursement must be made from funds during the program year in which they were incurred.

Support Service Definitions

EOP contractors may provide the following types of support service (unless noted otherwise in grant-specific regional program standards). 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).

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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.

Note: WIOA funds may not be used to pay late fees

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

Child and Dependent Care

Childcare costs are for a child(ren) 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 Car

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.

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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.

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 for past-due rent or mortgage payment.

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.

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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.

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: Participant drug testing is not allowed except where required to participate in a Training, Apprenticeship program or to facilitate the hiring process for the participant.

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.

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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.

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.

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Bicycle Purchase

When a participant chooses and it is determined that the purchase of a bicycle is as, or more, cost effective than 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 vehicle services but can reimburse for the month(s) that the participant uses the service for allowable

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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.

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Performance

EOP performance measures apply to all participants unless they exit under a Global Exclusion reason (see below for more detail). All performance is tracked, managed and reported to EOP funders through I-Trac.

EOP Measures

Measure	Calculation Methodology	Performance Cohort	Reporting Cohort	I-Trac Data Entry
Attained Unsubsidized Employment by Full Program Exit	Denominator: All exited participants that were not employed at registration Numerator: Number of participants employed by the end of Q4 following the Exit date	Between Exit date and end of Q4 after Exit date	Q4 after Exit	Enter "By the end of Q4 After Exit Employment Confirmation"
Attained Career Track Employment by Full Program Exit	Denominator: All exited participants Numerator: Number of participants that are employed by the end of Q4 following the Exit date in a position that aligns with the Career Track Employment goal identified in their Career and Resource Plan.	Between Exit date and end of Q4 after Exit date	Q4 after Exit	Enter "By the end of Q4 After Exit Career Track Employment Confirmation"
Advancement in Employment	Denominator: All participants that were employed at enrollment or who are in the Unsubsidized or Career Track Employment numerator Numerator: Number of participants that have at least one advancement in employment between Participation date and end of Q4 following the Exit date Advancement Definition: An increase in wage, hours worked, or availability of benefits. The base from which advancement is calculated is the employment elements at enrollment or with the job secured during program engagement. Benefits are considered an advancement if the benefits are offered and accepted or offered and not accepted, it is the availability of benefits in the position that counts.	Between Participation date and end of Q4 after Exit date	Q4 after Exit	Enter "By the end of Q4 After Exit Advanced in Employment Confirmation"

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Measure	Calculation Methodology	Performance Cohort	Reporting Cohort	I-Trac Data Entry
Average hourly wage <i>DCJ EOP Only</i>	Denominator: All employed participants Numerator: Total wages of all participants employed	Between Participation Date and the end of Q4 after Exit date	Quarter of Q4 after Exit date	Enter wage information in Employment Information control on Outcomes Tab
Participants served who are people of color	Denominator: All enrolled participants Numerator: Number of participants who identify as a person of color	At Enrollment	Quarter of Enrollment	Ethnicity and Race Demographics data on the Registration Tab
Household Income <i>AHFE EOP Only</i>	Denominator: All enrolled participants Numerator: Number of participants with household income at 50% and 30% median family income	At Enrollment	Quarter of Enrollment	Income data on the Registration Tab
Occupational Skills Training Starts <i>Portland EOP and Washington County EOP Only</i>	Calculation: Number of enrolled participants with a Training service with a status of Started. Definition: Training includes Occupational Skills Training; Prerequisite Training; Workforce Preparation and Pre-Apprenticeship Program services. This does not include Work Experience services	Between Participation and Exit date	Quarter of service start date	Copy Trainings funded by WSPM from WSPM Adult/DW record into EOP record; enter Trainings funded by other sources directly into EOP record
Occupational Skills Training completions <i>Portland EOP and Washington County EOP Only</i>	Denominator: All participants with an Occupational Skills Training, Prerequisite Training, Workforce Preparation or Pre-Apprenticeship service with a status of Started Numerator: Number of participants with a Training service with a status of Completed	Between Participation and Exit date	Quarter of the service end date	Copy Trainings funded by WSPM from WSPM Adult/DW record into EOP record; enter Trainings funded by other sources directly into EOP record
Average wage for those placed in employment at Exit to Follow-Up <i>Portland EOP Only</i>	Denominator: All participants placed in employment at Exit to Follow-Up. Numerator: Sum of wages for participants with a At Exit Employment Confirmation	Quarter of Exit Date	Quarter of Exit Date	Enter "At Exit Employment Confirmation"

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Measure	Calculation Methodology	Performance Cohort	Reporting Cohort	I-Trac Data Entry
Average wage for those placed in employment at Full Program Exit <i>Portland EOP Only</i>	Denominator: All participants placed in employment at Full Program Exit Numerator: Sum of wages for participants with an Employment Detail record in I-Trac	Quarter of Full Program Exit Date	Quarter of Full Program Exit Date	Employment detail I-Trac record

WIOA Performance Measures

Measure	Calculation Methodology	Performance Cohort	Reporting Cohort	I-Trac Data Entry
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	Enter "Q2 After Exit Employment Confirmation" in the WorkSource I-Trac record
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	Enter "Q4 After Exit Employment Confirmation" in the WorkSource I-Trac record

Career Boost Measures

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

SNAP E&T Service	Calculation Methodology	I-Trac Data Entry
Job Search Training	Number of participants that receive a Job Search Training service.	Service copied from the Qualifying Grant fund to the Career Boost fund
Career/Technical Education or Other Vocational Training	Number of participants that receive a Career/Technical Education or Other Vocational Training.	Service copied from the Qualifying Grant fund to the Career Boost fund

Additional Performance and Data Guidance

Performance data is tracked and reported through I-Trac. Where required of a performance measure element, participant files are to contain the supporting documentation.

Contractors should establish a process to regularly review I-Trac reports for data quality. Ensure that participants' engagement in services and credential and/or employment attainment is being entered within the required timeframes and with appropriate confirmations (where required).

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Additional guidance to consider when managing data for performance follows.

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.

Case Notes

All data entered in the I-Trac system is defined as a case note. Narrative case notes entered into the system 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. A case note is also to be completed to document when a participant cannot be located or contacted.

Enrollment Capacity

The number of participants in In-Program services plus the number of participants in Follow-Up services who have received at least one Follow-Up service within a quarter.

Enrolled Participant

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

Exits

- **Auto-Exit**

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

- **Exit to Follow-Up**

A participant is transitioned from the In-Program Phase into the Follow-Up Phase when program participation goals listed in the Career and Resource Plan 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 EOP without completing eligibility and re-enrolling in a new enrollment episode.

Employment Advancement

Participants that report a gain in wage, hours worked per week or employer-offered benefits between Participation Date and Full Program Exit Date are counted in the advancement in employment performance measure. It is the contractor's responsibility to accurately account for the details that inform this measure. I-Trac documentation is acquired by entering a By End of Q4 After Exit Advancement in Employment.

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Note: Benefits are considered an advancement if the benefits are offered and accepted or offered and not accepted, it is the availability of benefits in the position that count towards advancement.

Employment Placement

Contractor staff is responsible for collecting confirmation of employment details and entering the information into I-Trac on the Outcomes tab. Communication from the participant of the confirmation details is acceptable; no additional documentation is required. Contractor staff are responsible for accurate accounting of earnings, hours and benefits information that inform this measure. When participants auto-exit and contractor staff learn they became employed, staff should attempt to contact the participant and obtain the employment details.

- **Placed in Unsubsidized Employment**

Placed in Unsubsidized Employment is defined as a participant obtaining employment that is not identified as part of their articulated career track goal on their Career and Resource Plan. Performance is captured between the Exit to Follow-Up Date and end of Q4 following the Exit Date. I-Trac documentation is acquired by entering an At Exit Employment Confirmation.

- **Placed in Career Track Employment**

Career Track Employment is defined as a job or position within an occupation that is part of an articulated career track goal identified on their Career and Resource Plan that provides ongoing opportunities to advance skills and increase earnings over time, such that a participant can earn a living wage that meets their self-sufficiency standard goal. I-Trac documentation is acquired by entering an At Exit Career Plan Employment Confirmation.

Employment Retention

Employment Retention is defined as participants that are employed in any two quarters of the four quarters following the Exit to Follow-Up Date. Quarters do not have to be consecutive and employment in the two quarters counted for performance do not have to be the same employment placement (employer). I-Trac documentation is acquired by entering any two of the following Employment Confirmations: Q1, Q2, Q3 or Q4 After Exit Employment or After Exit Career Plan Employment.

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)

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. 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.

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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.

add Employment Information						
	Start Date	End Date	Employment Type	Employer	Industry (NAICS)	
edit	10/11/2022		Unsubsidized Employment	Worksystems Inc.	Administrative and Support and Waste Management and Remediation Services	
	add	Date	Position (ONET)	Hourly Pay	Hours/Week	Benefits
		10/11/2022	Administrative Services Managers	\$15.00	20.00	No Benefits

Training and Work-Based Training Data Entry

Occupational Skills Training, Prerequisite Training, Pre-Apprenticeship Program, Workforce Preparation and Work Experience services funded by WorkSource or PDX Metro Works will be entered by WorkSource or PDX Metro Works staff in the WSPM Adult/DW or PDX Metro Works I-Trac record and copied to the EOP I-Trac record. Any other Trainings that are not funded by WorkSource should be entered into the appropriate EOP record directly. Staff should check participant's WSPM Adult/DW record before entering Training into EOP record to avoid duplicate entries.

Global Exclusions for Performance

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.

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.

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Documentation Requirements

The following are documentation requirements for all EOP projects.

Requirement	Detail	Location
Program Application	A completed and signed EOP 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
Eligibility Elements	Required documentation of program eligibility elements as noted in appropriate Regional Program Standards. The signed Application serves as documentation of all participant eligibility attestation where a separate document is not required. Documentation of Name/D.O.B. and Selective Service (if applicable) and WSPM documentation checklist are required.	Participant File Signed application in I-Trac Customer Documentation Upload
Career and Resource Plan	Original plan and updates.	I-Trac Services Tab-Career and Resource Planning service Participant File Plan/updates in I-Trac Customer Documentation Upload – Individual Plan
Financial Need	If support services are provided, financial need is documented in a Prosperity Planner budget.	I-Trac Prosperity Budget
Housing Status <i>AHFE EOP only</i>	Experiencing or at Imminent Risk of Long-Term Homelessness form must be completed for each enrolled participant in the AHFE program.	I-Trac Documentation Upload
Program services reflected in appropriate other grants	EOP program services are copied into other grants and records such as: Rent Assistance, Career Boost, P10K, if applicable.	I-Trac
Required Disclosures	At the time of registration, the participant should be provided with the social security number use disclosure and the EEO Grievance disclosure.	Participant File Signed Application in I-Trac Customer Documentation Upload.

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Criminal Background Requirements

CONTRACTOR must verify that each of the Contractors' employees and volunteers and subcontractor employees and volunteers (referred to in this Exhibit C: Statement of Work as Affected Employees and Volunteers), as a condition of working directly with OYEP 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 OYEP services or manage a OYEP 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 OYEP programs/employees.
- Contractor volunteers that provide OYEP services to OYEP 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 OYEP services to OYEP 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 OYEP 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

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

Criminal Background Check Policy

CONTRACTOR 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 OYEP participants:
 - The severity and nature of the crime.
 - The number of criminal offenses.
 - The time elapsed since commission of the crime
 - The circumstances surrounding the crime
 - The subject individual's participation in counseling, therapy, education or employment evidencing rehabilitation or a change in behavior; and
 - 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 OYEP services. The reasons must address how the applicant/volunteer is presently suitable or able to work with OYEP 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 OYEP 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 – CONTRACTOR determines if they want to hire the applicant/volunteer into the Affected Employees/Volunteer position.
 - Where the decision to hire is No – nothing more is required.
 - Where the decision to hire is Yes – 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 OYEP services. The State New Background Justification Form can be found on the Knowledge Base.
 - The State New Background Justification Form and a copy of the background report must be placed in the employee/volunteer personnel file.
 - CONTRACTOR will support all Worksystems annual program monitoring activities on compliance with these criminal background check procedures.

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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		Documents that Establish FIRST DATE OF ENTRY into the United States. Documents must cover entire duration in the United States				
LIST A	AND	First Date of Entry to U.S. after reaching 26 years of age LIST B	OR	First Date of Entry to U.S. was before turning 26 YEARS OLD Provide proof from first entry and any others. 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 CATEGORIES	
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>.