Regional Program Standards

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

Topic: NextGen Youth Program

Date: October 4, 2025	❑ **New** ☒ **Revised**	

Overview

The Portland Metro Workforce Development Board has adopted a Strategic Plan that calls for all youth, with a focus on those who have not had equitable access to opportunities, to gain the skills and experience to succeed in the workforce.

Services for the Federally funded Workforce Innovation and Opportunity Act (WIOA) Youth program and the City of Portland Economic Opportunity Initiative (EOI) program in the Portland Metro area are offered through an established network of Next Generation Youth (NextGen) Service Providers. The focus of NextGen services is career pathway preparation and training that leads to career track employment.

Contents

Eligibility

Contractors must establish processes that prepare potential participants (Applicants) to complete the eligibility and enrollment requirements for the WIOA Youth and EOI program (NextGen) outlined within these *Regional Program Standards*.

Education Status

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

Out-of-School

- Age 16-24.
- Not attending any school (Secondary or Post-Secondary) as defined by State law.
- Low income (see below for additional detail and definition).
- Have at least one Qualifying Employment Characteristic (see below for additional detail and definition).
- Sex assigned male at birth and aged 18 and older must be registered for Selective Service (see below for additional detail and definition).
- Authorized to work in the United States (work authorization)
- Able to complete WIOA Youth documentation.

In-School

- Age 16-21.
- Attending school as defined by State law, excluding enrollment in YouthBuild, Job Corps and Adult Basic Education Title II programs.
- Low Income (see below for additional detail and definition).
- Have at least one Qualifying Employment Characteristic (see below for additional detail and definition).
- Sex assigned male at birth and aged 18 and older must be registered for Selective Service (see below for additional detail and definition).
- Authorized to work in the United States (work authorization)
- Able to complete WIOA Youth documentation.

Low Income

A determination of low income is required for:

- All In-School youth.
- Out-of-School youth who have completed their high school diploma/GED equivalent and the only Qualifying Employment Characteristic is Basic Skills Deficient or English Language Learner.
- Out-of-School youth with only a Qualifying Employment Characteristic of Requires Additional Assistance to complete an education program or to secure or hold employment.

To be determined low income for NextGen eligibility, the Applicant must meet one of the WIOA low-income qualifiers outlined in Addendum 1.

Note: *Refer to Addendum 2 for additional income calculation guidance.*

Qualifying Employment Characteristics

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

Out-of-School Applicants

- Homeless or Runaway.
- In or Aged Out of Foster Care.
- High School Dropout.
- Aged 16-18 and have not attended school for at least one quarter.
- Justice System Involvement.
- Pregnant or Parenting.
- Person with a Disability (including learning disabilities).
- Basic Skills Deficient (if not attending school, have completed high school diploma/GED equivalent **and** are low income).
- English Language Learner (if not attending school, have completed high school diploma/GED equivalent **and** are low income).
- Is low income and meets one of these criteria indicating they Require Additional Assistance to complete an education program or to secure or hold employment:
    - Applicant has never held a job.
    - Applicant is between the ages of 18 and 24 and has never held a full-time job.
    - Applicant is between the ages of 18 and 24 and has been fired from a job prior to program application.
    - Applicant has quit Post-Secondary education without attaining a recognized credential.

In-School Applicants

- Homeless or Runaway
- In or Aged Out of Foster Care
- Justice System Involvement
- Pregnant or Parenting
- Person with a Disability (including learning disabilities)
- in Basic Skills Deficient
- English Language Learner

- Requires Additional Assistance to complete an education program or to secure or hold employment as evidenced by one of these criteria:
  - Applicant has never held a job.
  - Applicant is between the ages of 18 and 24 and has been fired from a job prior to program application.
  - Applicant is deemed at risk of dropping out of school.
  - Applicant has been placed on probation, suspended from secondary school, or expelled from Secondary school.
  - Applicant has repeated at least one Secondary grade level.
  - Applicant is behind the credit rate required to graduate from High School.

WIOA Youth requires that only five percent (5%) of In-School Youth newly enrolled Applicants in a given program year (July-June) may be determined eligible using the Employment Characteristic of Requires Additional Assistance therefore this characteristic can only be reported for In-School Applicants when it is the only characteristic the Applicant has to determine eligibility.

Eligibility Documentation

When staff have reviewed the program design and requirements and have determined the Applicant is interested and a good fit for the NextGen program, documenting eligibility determination can begin.

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 NextGen Application will be the documentation of the attestation. This will be reflected in I-Trac as “Signed Application.”

Birth Date

One of the allowable documents which reflects a birth date that supports the Applicant’s age is required:

Baptismal Record	Public Assistance Benefits Letter or Crossmatch
Birth Certificate or Hospital Record of Birth	Record of incarceration, hospitalization, or institutionalization
DD-214 Military Separation Record	School Records or School ID Card
Driver’s License	Selective Service Registration Acknowledgement Letter
Family Bible	Selective Service Registration Card
Government Issued Photo ID (includes Passport)	Tribal ID Card
Passport	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.

Qualifying Employment Characteristics

Basic Skills Deficient

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

1. Have English reading, writing, or computing skills at or below the 8th grade level on a generally accepted standardized test administered within the last 12 months from the date of eligibility determination. A copy of the test must be maintained in the participant file.

   Or

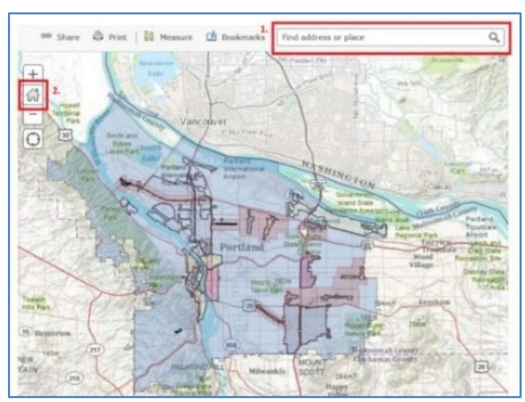
2. Unable to compute or solve problems, or read, write, or speak English at a level necessary to function on the job, in the individual's family, or in society. This may be determined by staff during the enrollment process while working with the Applicant when at least one of the following elements are observed (and therefore assessed). This is documented in I-Trac with the assessment selection made by staff in the Basic Skills control.

   - 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.
   - Qualifies for Special Education services or has an Individual Education Program (IEP) plan.
   - Is enrolled in a Title II Adult Education and Family Literacy Act program, this also includes enrollment in English as a Second Language (ESL) class.
   - Determined to be Limited English Skills proficient through staff-engagement and observation.
   - Staff make observations of deficient functioning in completing forms, assisting in the development of a service strategy, or behaviors in group discussion settings.

Requires Additional Assistance

The Employment Characteristic of Requires Additional Assistance requires a Registration Note to be entered on the Registration Tab to document what type of Requires Additional Assistance the Applicant is attesting to. Refer to Eligibility – Requires Additional Assistance above in these *Regional Program Standards* for additional information.

Residence



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

Individual Career Plan

Staff develop an initial Individual Career Plan to document an anticipated service strategy that aligns with the NextGen program design. The initial plan date must be prior to the Participation Date; the plan is to be maintained on file with any copies of eligibility documents. The Individual Career Plan is to be updated as the participant engages in NextGen services. See *Individual Career Plan* service definition below in these *Regional Program Standards*.

Objective Assessment

An Objective Assessment is to be completed to determine service needs; the assessment is to be maintained on file with any copies of eligibility documents. The date of the assessment must be prior to the Participation Date.

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 the NextGen program. Applicants who would like additional information regarding Selective Service registration may be referred to this website: https://www.sss.gov.

Applicants between the ages of 18 and 25 who have not yet registered must do so to move forward in the NextGen 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.

Note: *Refer to Addendum 3 for a list of acceptable Selective Service documents.*

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

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

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

Additional Selective Service Registration Notes

Applicants under the age of 18

All Applicants who are under age 18 when they begin participation in NextGen services who are sex assigned male at birth and who are not exempt must register for Selective Service within 30 days of their 18th birthday (i.e., 30 days before or 30 days after their birthday); if they do not register, they must be exited from all program services. All Applicants required to register who will turn 18 during either In-Program services or Follow-Up services should be made aware of this requirement prior to final enrollment decisions. Participants who turn 18 and are required to register, choose not to, and are exited from services will be included in all program performance measures. The documentation of Selective Service Registration after NextGen Registration must be uploaded to I-Trac. If a document is unable to be uploaded, a copy of the document must be retained in the participant file.

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."

Participant Enrollment

Work Authorization

Work authorization verification must be completed to enroll an Applicant. As Service Providers conduct verification of work authorization, they must ensure they comply with the nondiscrimination provisions at Section 188 of WIOA and its implementing regulations at 29 C.F.R. part 38. To ensure equal treatment, all Applicants must provide documentation of authorization to work in the United States. To verify that the Applicant is authorized to work within the United States, applicants must present documentation to staff that is equivalent to the Federal Form I-9 requirements. Refer to *the US Citizenship and Immigration Services website, uscis.gov*, for guidance. ***A copy of the document(s) is required to be uploaded to the I-Trac record.***

> **Note:** The documents on **List A** show both identity and work authorization. Applicants presenting an acceptable **List A** document should not be asked to present any other document.
>
> The **List B** document only verifies identity through a picture that matches what the person looks like (if a picture is provided on the **List B** document) and/or that the name on the **List B** document is exactly the same as what is listed on the **List C** document. Applicants who choose to present a **List B** document must also present a document from **List C**.
>
> Additional guidance on work authorization documents can be found in this link: Form I-9 Acceptable Documents | USCIS

Documentation is completed in the *Work Authorization* Control on the Registration Tab in the NextGen record. There are two classifications of work authorization documents in I-Trac – Permanent and Temporary.

- **Permanent**: Individuals who are authorized to work in the U.S. indefinitely without the need for periodic renewal or reverification. This status is typically held by:
  - U.S. citizens
  - Noncitizen nationals
  - Lawful permanent residents (Green Card holders)

According to federal guidance, individuals with permanent work authorization **DO NOT** require reverification of their work authorization—even when their document(s) (e.g., U.S. passport, Green Card) expire.

- **Temporary**: Individuals authorized to work in the U.S. for a limited time. This status is typically held by individuals who are not U.S. citizens or lawful permanent residents and who qualify under specific visa categories or programs.

For participants with a temporary work authorization document, you must view that participant's document every 90 days during their participation in In-Program and Follow-Up services for as long as their documentation remains temporary with an expiration date. Every 90 days you must ask the participant to show their work authorization documentation and confirm in I-Trac that the expiration date and document(s) entered in I-Trac matches the document(s) shown. You must also review work authorization document(s) with a participant once the document(s) used is expiring.

If the date and document type matches, enter a new Work Authorization record in I-Trac with the new review date, the document **DOES NOT** have to be uploaded again to I-Trac. If the date or document does not match, then a new Work Authorization record must be entered in I-Trac, and the new document(s) **MUST BE** uploaded to I-Trac.

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 Applicant will acknowledge receipt of these disclosures when they sign the NextGen 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. The collection of an Applicant's social security number is not required for program eligibility purposes and providers may not deny services if an Applicant is eligible for NextGen services and chooses not to disclose their number. Applicants must be provided the SSN Disclosure (Standard SSN April 2025) that describes how their SSN will be used and the program's commitment to confidentiality.

Where the Applicant agrees to the use of their SSN for reporting purposes, the indication is noted through I-Trac on the NextGen Application for services and the consent is the Applicants' signature on the Application.

Equal Opportunity (EO)/Grievance Disclosure

The EO Disclosure (April 2025) is to be given to the Applicant during the eligibility determination interview meeting. Reasonable efforts should be made to assure that the information and complaint procedures are understood by potential Applicants.

Enrolled Participant

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

> ***Note:*** Applicants under the age of 18, Contractor staff must conduct due diligence to obtain parent/guardian signature for enrollment. Where a parent/guardian is absent, an Applicant under the age of 18 may be enrolled without parent/guardian signature. Once confirmed that a parent/guardian is absent, the participant may sign the Application in place of a parent/guardian with a case note entered in I-Trac by the Career Coach to document this.

Eligibility Review
Once the I-Trac Application is signed, the Registration Results Control reflects no missing information and shows the Applicant to be eligible for “WIOA” only or “WIOA” and “EOI,” the I-Trac record and Applicant file is to be reviewed by a Reviewer who has been designated and trained to conduct eligibility reviews. The Reviewer is responsible to validate that all documents have been collected, are correct, and support eligibility.

The eligibility determination review must be conducted within 45 days of the NextGen I-Trac Application Date. Once the review is complete, the Reviewer enters the review date in the I-Trac record (which becomes locked from any further edits of eligibility data) and the Applicant may begin participation in NextGen services. Participation begins with the first NextGen funded service entered in I-Trac.

Ineligible Customers

Applicants who do not meet the NextGen 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 should be reviewed and discussed, and the Applicant referred to MyWorkSource for additional service options. Formal referrals are not required. All costs associated with participants found to be ineligible after receiving program-funded services will be disallowed.

Transferring Participants

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

- Confirm with the participant that they agree to the transfer and document through a case note in I-Trac. The case note must also explain the reason for the transfer.
- Obtain approval from both the current NextGen provider Program Manager and the receiving NextGen provider Program Manager. Document this in the Transfer control 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 NextGen I-Trac record.

All eligibility documentation for the NextGen 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.

Addendum 1 – WIOA Youth Eligibility

Eligibility	Out of school - OSY	In school - ISY
Education Status (determines ISY/OSY)	• Out of School – Completed HS Diploma/GED/Equivalent • Out of School – Dropped out or expelled from High School or Less • Out of School – School Age (16-18) and Not Attending School for at Least 1 Quarter	• In School – Alternative High School for GED • In School – Alternative High School for Diploma • In School – High School or Less • In School – College or Post High School Technical Training
Age	16-24 (local policy may limit ages)	16-21 (local policy may limit ages)
Selective Service Registration	Yes - where required	Yes – where required
Work Authorization	Yes	Yes
Low Income (or Low Income Waiver)	Yes, If ONLY Qualifying Employment Characteristic Type is from Low Income Category C	Yes, If ONLY Qualifying Employment Characteristic Type is from Low Income Category C
Defined:	At least one of the following applies: • 6 Month Family Income: LLSIL • Eligible to Receive Free or Reduced Lunch • Census Tract (High Poverty Area) • Family is receiving one of the following Public Assistance types in last 6 months: o TANF o General Assistance o Refugee Assistance o Supplemental Security Income (SSI, Title XVI) o Social Security Disability Income (SSDI) o Food Stamps (SNAP) • Auto Low Income Characteristic Type is from Category A below	At least one of the following applies: • 6 Month Family Income: LLSIL • Eligible to Receive Free or Reduced Lunch • Census Tract (High Poverty Area) • Family is receiving one of the following Public Assistance types in last 6 months: o TANF o General Assistance o Refugee Assistance o Supplemental Security Income (SSI, Title XVI) o Social Security Disability Income (SSDI) o Food Stamps (SNAP) • Auto Low Income Characteristic Type is from Category A below
Qualifying Employment Characteristic Types	**Have at least one Characteristic below and follow the Low-Income Category for that Characteristic.**	**Have at least one Characteristic below and follow the Low-Income Category for that Characteristic.**
Low Income Category A: Automates Low Income Status by Definition	• Foster Care • Homeless/Runaway	• Foster Care • Homeless/Runaway
Low Income Category B: Low Income Status Not Required	• Aged Out of Foster • Disabled (including learning disabilities) • Parenting • Pregnant • School Dropout (High School or Less) • School Age (16-18) and Not Attended School For at Least 1 Quarter • Justice System Involvement	
Low Income Category C: Low Income Status is Required if there are only characteristics from this category	• Where Education Status = Not in School – Completed HS Diploma/GED/Equivalent AND one of the following applies: o Basic Skills Deficient o English Language Learner • Requires Additional Assistance	• Aged Out of Foster • Basic Skills Deficient • Disabled (including learning disabilities) • English Language Learner • Justice System Involvement • Parenting • Pregnant • Requires Additional Assistance

Addendum 2 – Low Income Calculation

Income Calculation

As part of the NextGen Registration process, a calculation of the applicant's Six-Month Family Income is required.

Include all income received by all members included in the family size (determined at time of application) during the six-month period prior to Application. The six-month family income is annualized by multiplying the six-month income by two (six-month income x 2). Unless specifically identified as being excluded from the income calculation, all income must be included. Income of prior family members who may have comprised part of the family during the past six months but are no longer members of the household at time of application (i.e., divorced, separated, or deceased spouse, or other family member) would not be counted for income determination purposes. Only the income of members of the current family should be counted and applied against the current family size.

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

The WIOA definition of Low Income is used to determine eligibility for enrollment in the NextGen program. The EOI definition of Low Income, is **not** an eligibility requirement for enrollment in the NextGen program. Instead, it is a data point used to assess eligibility for specific funding sources and to support tracking toward enrollment goals.

Definitions

Family Size

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

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

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

Disability Family of One

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

Dependent Child

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

Independent Child

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

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

Low Income – EOI Eligible

To be determined low income for EOI funding eligibility, the Applicant must meet one of the EOI low-income qualifiers outlined below:

- The total family income for the six months prior to eligibility determination is not more than 80 percent of the Portland Area Median Family Income (MFI).
- The Applicant received certain types of public assistance during the previous six months: Temporary Assistance for Needy Families (TANF), General Assistance, Refugee Assistance, Supplemental Security Income, Social Security Disability Income, Supplemental Nutrition Assistance Program (SNAP, i.e., food stamps).
- The Applicant is eligible to receive Free or Reduced Lunch. This includes an OSY Applicant who is a parent living in the same household as the child and where the child receives or is eligible to receive free or reduced-price lunch based on their income level.
- Employment Characteristics that automatically qualify an Applicant as low income: Foster Care and Homeless (which includes Runaway in its definition).

Low Income – WIOA Eligible

To be determined low income for WIOA eligibility for enrollment in the NextGen program, the Applicant must meet one of the WIOA low-income qualifiers outlined below:

- The total family income for the six months prior to eligibility determination is not more than 70 percent of the Lower Living Standard Income Level (LLSIL) or the poverty rate, whichever is higher for that family. Follow this link to view the Oregon LLSIL Standards for 2025: Oregon Workforce Innovation and Opportunity Act Income Guidelines.
- The Applicant received certain types of public assistance during the previous six months: Temporary Assistance for Needy Families (TANF), General Assistance, Refugee Assistance, Supplemental Security Income, Social Security Disability Income, Supplemental Nutrition Assistance Program (SNAP, i.e., food stamps).
- The Applicant is eligible to receive Free or Reduced Lunch. This includes an OSY Applicant who is a parent living in the same household as the child and where the child receives or is eligible to receive free or reduced-price lunch based on their income level.

- Residence is in a census tract within a high poverty area (map located on the Registration Tab in I-Trac).
- Employment Characteristics that automatically qualify an Applicant as low income: Foster Care and Homeless (which includes Runaway in its definition).

Please refer to the Six-Month Income Calculator Worksheet on the Knowledge Base.
Six Month Income Calculator Worksheet

Income to Include or Exclude from Six Month Income Calculations

		Include in Income Calculation	
Income Type	**Income Type Description**	**WIOA**	**EOI**
Alimony	Payments made by an ex-spouse	Yes	Yes
Allotments	Military family allotments or other regular support from an absent family member or someone not living in the household	Yes	Yes
Annuity Payments	Regular insurance or annuity payments	Yes	Yes
Assets	Any assets drawn down as withdraws from a bank, the sale of property, a house, or a car	No	Yes
Capital gains	A profit from the sale of property or of an investment.	No	Yes
Child support*	Child support payment	Yes	No
Educational Assistance	Educational financial assistance under Title IV of the Higher Education Act, Pell, Grants, Federal Supplemental Educational Opportunity Grants, Federal Work Study, Stafford, and Perkins loans	No	Yes
Foster Care	Foster childcare payments	No	Yes
Fringe Benefits	Non-cash benefits such as: employer paid fringe benefits, food or housing received in lieu of wages, Medicare, Medicaid, food Stamps, school meals and housing assistance	No	No
Grants	College or university grants, fellowships, and assistantships	Yes	Yes
Lottery	Net gambling or lottery winnings	Yes	Yes
Military	Pension payments such as those received by military retirees and pension benefits	Yes	Yes
Military	Any amounts received as military pay or allowance by any person who served on active duty	No	Yes
Other Payments	Tax refunds, gifts, loans, lump-sum inheritances, one-time insurance payments or compensation for injury	No	Yes
Pensions	Private, government employee	Yes	Yes
Retirement	Railroad retirement benefits	Yes	Yes

Scholarship	Needs-based scholarship assistance, State, and private grant aid	No	Yes
Self-Employment	Net receipts from farm self-employment (receipts from a farm which one operates as an owner, renter, or sharecropper, after deductions for farm operating expenses). Net receipts from non-farm self-employment (receipts from a person's own unincorporated business, professional enterprise, or partnership after deductions for business expense).	Yes	Yes
Social Security (SSB, SSDI)*	Old Age Survivors Income (SSB); Social Security Disability Insurance (SSDI)	Yes	No
Social Security (SSI)*	Supplemental Security Income (SSI)	No	No
Stipends	Training Stipends	Yes	Yes
Tribal	Income derived by a member of an Indian tribe from fishing rights-related activity of the tribe, payments made to Indians under PL 98-64 ("An Act to provide those per capita payments to Indians may be by tribal governments, and for other purposes.")	No	Yes
Unemployment*	Unemployment compensation	Yes	No
Union Strike Benefits	Benefits from union funds	Yes	Yes
Veterans	Pay or allowances previously received by any veteran (whether an applicant or a member of the applicant's family) while serving on active duty in the United States Armed Forces, payments received by a veteran for participation in National Guard service/activities, educational assistance and compensation to veterans and other eligible persons under Title 38	No	Yes
Vocational Rehab	Payments made to a client (except for OJT payments)	No	Yes
Wages	Money wages and salaries before deductions (gross)	Yes	Yes
Welfare Payments*	TANF, Emergency Assistance (EA), non-federally funded General Assistance (GA) and Refuge Cash Assistance (RCA)	No	No
WIOA	WIOA One Stop partner programs where income is not subsidized (e.g., On-the-Job Training wages)	Yes	Yes
WIOA	One Stop partners programs where income is subsidized. (e.g., work experiences, Support Services)	No	Yes
Worker's Compensation	Benefits and medical are paid or awarded to employees for on-the-job injuries and benefits paid to dependents of employees killed in the course of employment	Yes	Yes

Addendum 3 – Selective Service

LIST OF ACCEPTABLE DOCUMENTS

DO NOT send original documents.
COPIES ONLY

IMMIGRANTS/NONIMMIGRANTS may present a combination of

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

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

LIST OF ACCEPTABLE DOCUMENTS

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

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

Service Design and Definitions

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

WIOA Program Elements

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

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

In-Program Services

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

- Participants regularly meet one-on-one and in groups with their Career Coach and/or Skills Trainers for job readiness training and career awareness, career counseling and career exploration. These meeting and participation activities are to be documented in I-Trac. There must be service engagement at minimum once every 90 days.
- In-Program services are complete when a participant attains a Secondary credential, is basic skills sufficient, enters Post-Secondary education or training and/or begins employment in a career pathway job.

Adult Mentoring

(WIOA Youth Element 8: Adult mentoring)

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

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

Career Coaching

(WIOA Youth Element 13: Services that provide labor market and employment information)

Career Coaching services provide labor market and employment information about in-demand industry sectors or occupations available in the Portland Metro area such as career exploration and career counseling services.

- Career exploration is the process by which the Career Coach helps the participant develop knowledge of the variety of careers and occupations available across a wide range of industry sectors; the skill requirements, working conditions and training prerequisites; and the job opportunities. Useful tools are Careers NW, a Worksystems-sponsored website, and Oregon Employment Department's qualityinfo.org.
- Career counseling provides advice and support in helping the participant make decisions about what education and career path to take. Career Coaching services may include providing information about potential opportunities for Work Experience, Secondary education, and the long-term benefits of Occupational Skills Training and Post-Secondary Education.

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

- Assist in identifying career and education goals.
- Develop with the participant a plan that incorporates a customized set of NextGen services (required), WorkSource services (if applicable), and outside resources that will assist the participant in meeting their goals.
- Coach participants in the personal and interpersonal ("soft" or "life") skills required to obtain and retain employment and/or Post-Secondary placement.
- Assist participants in identifying and securing the resources and supports necessary to succeed in their training and career plans.
- Facilitate collaboration between the different Service Providers working with the participant to synchronize career and education goals and align resources.
- Coach participants in job search including resume review, interview coaching, and career advising.

Career Labs

(WIOA Element 6: Leadership development)

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

- Adaptability
- Analysis/Solution Mindset
- Collaboration
- Communication
- Digital Fluency
- Empathy
- Entrepreneurial Mindset
- Resilience
- Self-Awareness
- Understanding Workplace Diversity

Completion of the following Career Lab topics are required before or during a participant's participation in a Work Experience in the PDX Youth@Work program: Adaptability, Analysis/Solution Mindset, Collaboration, Communication and Self-Awareness.

Career Mapping Workshop

(WIOA Element 13: Services that provide labor market and employment information)

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

Career Related Learning Experience

(WIOA Youth Element 13: Services that provide labor market and employment information)

Activities designed to inform participants of career options available to them in their fields of interest. Activities may include company tours, guest speakers, informational and mock interviews.

Entrepreneurial Skills

(WIOA Youth Element 12: Entrepreneurial skills training)

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

- Creatively seek out and identify business opportunities.
- Develop business budgets.

- Understand various options for acquiring capital and the trade-offs associated with each option.
- Communicate effectively and market oneself and one's ideas.

Financial Literacy Education

(WIOA Youth Element 11: Financial literacy education)

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

Lesson topics must include Banking Basics, Income and Employment, Budgeting, Consumer Skills, Credit and Debt, Financing Higher Education, and Insurance.

Service Providers may consider using the Prosperity Planner (https://www2.prosperityplanner.org/) as an additional tool in support of financial literacy activities.

Individual Career Plan Development and Review

(WIOA Element 13: Services that provide labor market and employment information)

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

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

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

During In-Program services, the plan must be reviewed and updated every 180 days as the participant completes (or is unable to complete) activities as planned and should drive program participation. Each plan update is entered in I-Trac as an *Individual Career Plan Development & Review* service. If changes are made to the plan, an *Individual Career Plan Update Form* is required.

Leadership Development

(WIOA Youth Element 6: Leadership Development)

Opportunities that encourage responsibility, confidence, employability, self-determination, and other positive social behaviors which may include (but are not limited to): Community and service-learning projects; peer mentoring and tutoring; leadership training; life skills training; and positive work behavior and employability training.

Mental Health/Drug and Alcohol Counseling

(WIOA Youth Element 10: Comprehensive Guidance and Counseling)

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

Objective Assessment

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

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

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

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

Outreach and Recruitment

Activities designed to inform potentially eligible participants about the availability of education and training services, including NextGen services. Appropriate activities may include information sessions – both at the program site and at partner sites – and targeted recruitment through partner organizations, schools, or agencies.

Post-Secondary Preparation and Transition Activities

(WIOA Youth Element 14: Post-Secondary preparation and transition activities)

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

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

Secondary Education and Skills

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

Alternative Secondary Instruction

(WIOA Youth Element 2: Alternative secondary school services or dropout recovery services)
(Education Service)

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

GED Instruction

(WIOA Element 1: Tutoring, study skills, drop-out prevention services)
(Education Service)

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

High School Diploma Instruction

(WIOA Element 1: Tutoring, study skills, drop-out prevention services)
(Education Service)

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

Tutoring

(WIOA Element 1: Tutoring, study skills, drop-out prevention services)
(Education Service)

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

Training, Post-Secondary Education and Employment Skills

There are six categories of Training, Education and Employment Skills services offered through NextGen. All payments for these training services are entered in I-Trac on the Payments Tab in the Training & Education Service Payments control.

ABE and ESL Instruction Concurrent with Training

(WIOA Youth Element 4: Occupational Skills Training)
(Training Service)
A program designed as an integrated education and training model by concurrently delivering Adult Basic Education (ABE) or English as a second Language (ESL) with Occupational Skills Training to improve a participant's basic academic skills or English proficiency in conjunction with Occupational Skills Training.

Occupational Skills Training

(WIOA Youth Element 4: Occupational Skills Training)
(Training Service)

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

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

Post-Secondary Education

(Education Service)

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

Prerequisite Training

(WIOA Youth Element 4: Occupational Skills Training)
(Training Service)

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

Pre-Apprenticeship Training Program

(WIOA Youth Element 3: Paid and unpaid Work Experience)

A program designed to prepare participants to enter and succeed in a Registered Apprenticeship Program. Pre-Apprenticeship Training Programs (PATP) 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 PATP into their Registered Apprenticeship Program. If a PATP service also includes elements of Occupational Skills Training the service must be entered in I-Trac as both a Pre-Apprenticeship Program service and an Occupational Skills Training service. If a PATP service also includes elements of Workforce Preparation the service must be entered in I-Trac as both a Pre-Apprenticeship Program service and Workforce Preparation concurrent with Training. When entered as an Occupational Skills Training service or Workforce Preparation concurrent with Training, the participant will fall in the denominator of the WIOA Credential and Measurable Skills Gain performance.

Workforce Preparation Concurrent with Training

(WIOA Youth Element 5: Education offered concurrent with workforce preparation activities)

(Training Service)

Workforce preparation Concurrent with Training is an integrated education and Occupational Skills Training program that includes workforce preparation activities, basic academic skills, and hands on Occupational Skills Training that are taught within the same time frame and connected to Training in a specific occupation, occupational cluster, or career pathway.

Training Start Definition

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

Training Completer

A participant who completes a planned program of Training with a “complete” or “pass” designation from the school. Training completion must be reflected in the I-Trac record with a service end date and status of Completed. The Training end date is the last date the participant attended any service provided as part of that Training program. Credentials obtained by completing Training must be entered in I-Trac and a copy of the documentation of Credential attainment must uploaded to the I-Trac participant record.

Work Based Training

The following three types of services are entered in the Work Based Training Control.

Summer and Year-Round Work Experience

(WIOA Element 3: Paid and unpaid Work Experience)

A Work Experience (WEX) is intended to prepare a participant for future, unsubsidized employment, by matching participants with worksites committed to providing supportive supervision and mentorship in positions aligning with a participant’s short- or long-term career goals.

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

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

Work Experiences are an employer-employee relationship with the participant and a wage is paid. The Internal Revenue Service Fair Labor Standards Act apply. All participants must complete all Employer of Record-required documents and processes, including but not limited to: W4 (both Federal and State) and Form I-9. Refer to the PDX Youth@Work *Regional Program Standards* for the administrative rules for a Work Experience.

Job Shadow

(WIOA Element 3: Paid and unpaid Work Experience)

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

Learning Opportunity

(WIOA Element 6: Leadership Development)

Learning opportunities are a structured and short-term educational engagement with documented learning objectives. Participants can earn stipends for participation in and completion of Learning Opportunities. At scheduled intervals the Career Coach assesses participant progress.

A Learning Opportunity cannot include activities typically done by an employee to the benefit of a business. An employer-employee relationship does not exist with Learning Opportunities. Participants are not working at a worksite and the Learning Opportunity is not considered a Work Experience service. Participants are not paid wages but are paid a stipend for participation in and completion of education or learning activities. Recommended Learning Opportunities include LinkedIn Learning courses, Metrix Learning courses and early career and job skill exposure activities. Other Learning Opportunities may be permissible at the discretion of the Community Referral Partner following the *Learning Opportunity Guidance* located on the Worksystems *Knowledge Base*.

A *Learning Opportunity Training Agreement* is used to establish the expectations and responsibilities of all parties when a participant is placed in a Learning Opportunity. The participant and the Career Coach collaboratively determine the goals and expected professional development of the participant and complete the learning agreement. The agreement must include the type of Learning Opportunity, weekly check in schedule, learning objectives and the maximum amount of stipend that can be earned. The agreement must be signed by the participant, Career Coach, and the Program Supervisor **prior to** the start date of the Learning Opportunity service.

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

Learning Opportunity Administrative Requirements

- *Learning Opportunity Agreements* are not to exceed $1,000. Exceptions can be made over $1,000 with approval of Worksystems.
- Participants must complete a W-9 unless they request and qualify for an exception by Worksystems.

> - ***Note**:* Participants who have not been granted an exception and receive more than $599 in stipend payments in one calendar year will be issued a 1099 for tax reporting purposes.

Refer to the Stipend payments section of these Regional Program Standards and the *Knowledge Base* at https://help.worksystems.org/ for additional guidance.

Work Readiness Training

(WIOA Element 6: Leadership Development)

Instruction designed to increase a participant's workplace skills that includes positive work behavior and employability soft skills training.

Follow-Up Services

(WIOA Element 9: Follow-Up services)

Follow-Up services are provided upon a participant's completion of In-Program services and are intended to help ensure the participant is successful in employment and/ or Post-Secondary education. All participants must be offered an opportunity to receive follow-up services that align with their individual service strategy.
Follow-up services must be provided to all participants for a minimum of 12 months following exit from In-Program services unless the participant declines to receive them (which they may do at any point in time), or the participant cannot be located or contacted. A case note is entered in I-Trac to document if a participant opts out of Follow-Up services or cannot be located or contacted. Contact attempted or made for the sole purpose of securing documentation for performance reporting is not Follow-Up and is not to be counted and entered in I-Trac as a Follow-Up service.

Follow-up services are limited to:

- Support Services.
- Adult mentoring.
- Financial literacy education.
- Career Coaching.
- Job Search Assistance.
- Activities that help participants prepare for and transition to Post-Secondary education.

The types of follow-up services provided, and the duration, must be determined based on the needs of the participant; therefore, the type and intensity of services may differ for each participant. Training or Work Experience cannot be provided to participants in Follow-Up using WIOA Youth funds.

WIOA Service Reporting Definitions Addendum

Activity	Education Service[1]	Begin/Extend Participation[2]	Follow-Up[3]	I-Trac Tab/Control
Adult Mentoring	No	Yes	Yes	Services/Services Follow-up/Follow-up Services
Career Coaching	No	Yes	Yes	Services/Services Follow-up/Follow-up Services
Career Labs	No	Yes	No	Services/Services
Career Mapping Workshop	No	Yes	No	Services/Services
Career Related Learning Experience	No	Yes	No	Services/Services
Entrepreneurial Skills	No	Yes	No	Services/Services
Financial Literacy Education	No	Yes	Yes	Services/Services Follow-up/Follow-up Services
Individual Career Plan	No	Yes	No	Services/Services
Leadership Development	No	Yes	No	Services/Services
Mental Health/Drug and Alcohol Counseling	No	Yes	No	Services/Services
Post-Secondary Preparation and Transition Activities	No	Yes	Yes	Services/Services Follow-up/Follow-up Services
Secondary Education and Skills Services				
Alternative Secondary Education	Yes	Yes	No	Services/Secondary Education & Skills
GED Instruction	Yes	Yes	No	Services/ Secondary Education & Skills
H.S. Diploma Instruction	Yes	Yes	No	Services/ Secondary Education & Skills
Tutoring	Yes	Yes	No	Services/ Secondary Education & Skills
Training, Post-Secondary Education and Employment Skills Services				
ABE and ESL Concurrent with Training	Yes	Yes	No	Services/Training, Post-Secondary & Employment Skills
Occupational Skills Training	Yes	Yes	No	Services/Training, Post-Secondary & Employment Skills
Post-Secondary Education	Yes	Yes	No	Services/Services
Pre-Apprenticeship Program	No	Yes	No	Services/ Training, Post-Secondary & Employment Skills
Prerequisite Training	Yes	Yes	No	Services/Training, Post-Secondary & Employment Skills
Workforce Preparation Concurrent with Training	Yes	Yes	No	Services/Training, Post-Secondary & Employment Skills
Work Based Training Services				
Work Experience	No	Yes	No	Services/Work Based Training
Job Shadow	No	Yes	No	Services/Work Based Training
Learning Opportunity	No	Yes	No	Services/Work Based Training
Work Readiness Training	No	Yes	No	Services/Services

Payments

Stipend Payments

A Stipend is a sum of money paid to a participant to help cover basic costs while they engage in Secondary Education, Occupational Skills Training, Post-Secondary Education, employability skills and/or work readiness training. Examples of allowed services include Secondary Education, Tutoring, Learning Opportunities, unsubsidized Work Experience, Occupational Skills Training, Pre-Apprenticeship Program, Entrepreneurial Skills Training, Financial Literacy, Leadership Development, Career Labs and Work Readiness Training.

Stipends may be paid as an hourly amount attached to program engagement or as a total sum based on the length of the service engagement. There must be clear goals and expectations set forth as to what the participant must do to earn a Stipend, as documented in the participant's Individual Career Plan or Learning Opportunity Training Agreement. Every Stipend awarded must have a clear connection to a NextGen service tracked in I-Trac. The business process for Stipends is posted on the *Knowledge Base* and outlines the requirements to receive Stipends and comply with these Regional Program Standards.

Administrative Rules

- To award Stipends, NextGen Service Providers must have a policy and corresponding procedures that define how Stipends will be considered and awarded. The policy and procedures must meet the requirements of this policy; individual award payments will be reviewed and monitored against the provider policy and procedures. Provider policy and procedures must include the forms of acceptable documentation to be used to validate the service engagement for which Stipends will be paid.

  The policy must be provided to and approved by Worksystems' Youth Services Manager prior to any Stipend awards being planned or paid. If the policy is revised after approval, the revised version must also be approved before being implemented.
- Any participant receiving a Stipend must complete a W-9 form. Participants receiving more than $599 in Stipend payments in one calendar year will be issued a 1099 for tax reporting purposes.
- Each Stipend payment must include a record of the participant's engagement such as confirmation from the Training provider of attendance, a certificate of Training completion or Credential. If none of these confirmation types are possible for a participant in a virtual Training, the participant may provide a screen shot that shows their attendance in the relevant remote classroom. Staff must include a case note in the I-Trac record which outlines why the required documentation is not possible and justifies using the screen shot option. If none of these are possible for a participant in a Learning Opportunity, the participant can complete a reflection exercise (video or written report) after completion of the Learning Opportunity.
- Stipend payments are to be paid by check payable to the participant, direct deposit into an account in the participant's name, or via pay card through a payment system where a specific pay card is assigned to a participant. Gift cards, gift certificates or retail vouchers cannot be used as Stipend payment.
- Participants are required to sign an acknowledgment of receipt of the Stipend. Check endorsement or direct deposit (see additional details in Support Services) may be used as the signed receipt. Where pay cards are used, the signature is to be captured at the point the pay card is given to the participant, with the number/card ID noted. Electronic signatures are allowed utilizing tools such as DocuSign and Adobe Sign. Further Stipend payments to the pay card do not require additional signature.

- Stipend payment must be entered in I-Trac in the Stipend Control on the Payments tab.
- CDBG funds may not be used for the payment of Stipends.

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

Training & Education Service Payments

Tuition Payments

> NextGen funds ***may not be used*** to pay for tuition for NextGen participants who are designated as ISY in their NextGen enrollment. However, ISY may co-enroll in WSPM if the participant meets WSPM WIOA Adult and/or Dislocated Worker (DW) eligibility and apply for an ITA to fund the tuition payment. The Training must be on the State ETPL.

Tuition payments for Training can be provided in two ways:

Individual Training Account (ITA)
NextGen participants may be referred to WorkSource Portland Metro (WSPM) to apply for an ITA to fund a Training on the State Eligible Training Provider List (ETPL) if the NextGen participant meets WSPM WIOA Adult and/or Dislocated Worker (DW) eligibility. An ITA is a financial obligation by a WSPM Center to support classroom-based Training or instruction in a program that is on the State ETPL. ITAs may include the costs of tuition, related course fees (school, lab, etc.), and books required for the Training program. The State ETPL is the statewide roster of Training programs and providers specifically certified by the State to meet the requirements of the WIOA. Refer to *WSPM Regional Program Standards* for more information.

Procurement
To pay for a Training program outside of a WSPM funded ITA for OSY, the NextGen provider must make the purchase following their agency procurement policy.

Required Documentation
The detailed invoice from the Training provider which is equal to or greater than the tuition payment amount must be maintained in the financial files.

Incentive Payments

An incentive is a financially based reward to a participant for successful achievement of planned milestones in allowable education, Training, Work Experience activities or employment placement and retention. These activities may include all types of Work Experience (including those not funded by Worksystems), financial literacy and work readiness education, entrepreneurial training, Post-Secondary education, Occupational Skills Training, a Pre-Apprenticeship Program, Secondary Education or employment placement and retention goals.

Attendance-based milestones are not allowed.

Administrative Rules

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

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

- Activities and corresponding milestones and planned incentives must be outlined in writing in the participant's Individual Career Plan before the commencement of the activities.
- Planned Incentives must be tied to milestones specific to the Training, Work Experience activities or employment retention goals.
- Incentive payments are to be paid by check payable to the participant, direct deposit into an account in the participant's name, or via pay card through a payment system where a specific pay card is assigned to a participant. Gift cards, gift certificates or retail vouchers cannot be used as Incentive payment.
- Participants are required to sign an acknowledgment of receipt of the Incentive. Check endorsement or direct deposit (see additional details in Support Services) may be used as the signed receipt. Where pay cards are used, the signature is to be captured at the point the pay card is given to the participant, with the number/card ID noted. Electronic signatures are allowed utilizing tools such as DocuSign and Adobe Sign. Further Incentive payments to the pay card do not require additional signature.
- Planned Incentives are to be entered into I-Trac in the Payments Plan control prior to the commencement of the Incentive activity.
- Once the Incentive activity is completed and the payment awarded, the Incentive Payment is also entered in the Incentive Payment control on the Payments tab.
- CDBG funds may not be used for the payment of incentives.
- Stipend payments must be paid from funds during the program year in which the program engagement occurred.

Incentive Guidance

Examples of incentives for employment placement and retention may include the following milestones. Service provider policy must include the documentation requirements.

Employment Milestones During In-Program	Times milestones can be earned
Obtained un-subsidized employment	Once per program year (July-June)
Remained employed (examples 3, 6, 9, 12 months)	Defined in service provider policy
Employment Milestones During Follow-Up	**Times milestones can be earned**
Remained employed during 1st quarter after Exit to Follow-Up	Once per enrollment episode
Remained employed during 2nd quarter after Exit to Follow-Up	Once per enrollment episode

Remained employed during 3rd quarter after Exit to Follow-Up	Once per enrollment episode
Remained employed during 4th quarter after Exit to Follow-Up	Once per enrollment episode

Support Service Payments

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 Contractor 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 NextGen program 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). NextGen grant-funded Support Services are available during both In-Program and Follow-Up services.

Prerequisites

Participants who seek Support Services must be Registered and enrolled in NextGen and have documentation of Support Service need.

Documentation of Support Service Need

The support must be necessary to enable the participant to engage in Training, job search activities or employment. Documentation of need may be competed through the following methods:

- Completion of a Prosperity Planner budget

  OR

- Customer Attestation through one of the following characteristics documented through a case note in I-Trac attached to the first Support Service payment:
  - Homelessness
  - Just released from incarceration within the past 90 days
  - Receiving public assistance including TANF, SNAP, Medicaid/SCHIP/OHP, HUD Housing Choice Voucher (Section 8), Home Energy Assistance (LIHEAP, OEAP, or WAP), Free & Reduced-Price Lunch (School Nutrition Program), WIC Program
  - Qualifies for a Tri-Met Low-Income Fare Hop Fast pass

- The total family income for the six months prior to the Support Service payment is not more than 70 percent of the Lower Living Standard Income Level (LLSIL). Refer to *Addendum B* above in these Regional Program Standards for additional information on income calculation.
- Unemployed

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 are required to be filed with the fiscal documentation.

Fiscal Procedures

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

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

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

> **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 Payments

Definitions

Contractors may provide the following types of Support Services. If the support is not defined below it is not allowable for payment under this policy.

Note: Funds may not be used to pay for interest charges, late fees or payment or modification of a debt.

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 GED, ABE, ESL, Workforce Preparation and Occupational Skill Training.

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

Child and Dependent Care

Childcare costs are for a child(ren) age 12 and under during the time the participant is engaged in program services — including travel to and from the service delivery site. Due to the high cost and limited resources this support should only be considered on a case-by-case basis.

A spouse, sibling, or other family member residing within the same household may not be paid with Support Service funds to provide childcare for the participant's children. Costs for care of an individual age 13 or over may only be paid if there is a documented disability stating the individual may not be left alone.

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

Clothing/Personal Care

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

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

Credit Repair

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

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

Drivers Education Training

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

> ***Required Documentation***: Verification that the provider is ODOT-approved, and original invoice for the published fee/rate. Payment must be made to the Training provider.

Employment Documentation

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

> ***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.

Food

On a limited basis and in certain situations, food may be provided to NextGen participants as a Support Service. Food may be provided only to NextGen participants to enable their engagement in NextGen In-Program services as defined in these *Regional Program Standards* when the service crosses over a mealtime or the service is more than three hours in duration.

Use of NextGen funds for food must be limited to reasonable and necessary purchases. Food is only considered reasonable and necessary when there is adequate documentation for the necessity of engaging in a NextGen program service over a mealtime, or the service is more than three hours in duration.

Food is not permitted for celebrations, such as a graduation ceremony. The payment of food for an individual NextGen participant to purchase groceries is only permitted for participants who are not receiving Supplemental Nutrition Assistance Program (SNAP) assistance.

NextGen providers must coordinate with other programs to ensure that participants who are eligible for the Supplemental Nutrition Assistance Program (SNAP) or other food services are enrolled in such programs.

> ***Required Documentation***: NextGen Service Providers must have a policy and corresponding procedures that define the use of food as a Support Service. The policy and procedures must meet the requirements of this policy; food purchases will be reviewed and monitored against the provider policy and procedures. Provider policy/procedures must include at minimum:

- A dollar threshold (min. and max.) on how much, in total or per participant, is allowed.
- The requirement that a log be kept that tracks program services supported with food assistance. The log must include:
  - What NextGen In-Program service was provided.
  - Documentation of why the service was required to be delivered over a mealtime or document that the service was more than three hours in duration.
  - A list of participants receiving the service and a participant signature on the log.
- The original store or merchant receipt that reflects an itemization of the purchased items is required.

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

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 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.

Housing Moving Costs

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

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

Laptop Computer

Purchase of a basic laptop computer when needed to participate in program services, engage in Training or secure and/or maintain employment (when not provided by the employer or Training provider).

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

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.

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.

Bicycle Purchase
When a participant chooses and it is determined that the purchase of a bicycle is as, or more, cost effective then other types of transportation assistance, Support Service funds may be used to purchase a bicycle, including an appropriate bike helmet if the participant does not own one. If appropriate staff may require the participant engage in a bicycle safety class or may purchase a child's helmet or seat if the bicycle transportation is being used to drop children at school or child care 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 for reasonable costs. (https://communitycyclingcenter.org/)

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). An electric bike or scooter is allowed if the price is comparable to the price of a bike.

Note: 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 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 signed receipt for each instance of a transportation payment can replace a log as long as the tie to services is noted.
- A participant's signature acknowledging receipt of bus passes, bus ticket packages (not individual tickets), and gas card distribution is required. Signature acknowledging receipt can be obtained on the transportation log or through email confirmation from the participant.
- 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.
- Receipts for the total amount of a gas card are required and must show allowable and approved purchases (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 or phone number (in the case of cell phones).

Required Documentation: Clear verification (copy of detailed utility invoice that matches participants address. Cell phone invoice that matches the participant's name or phone number in I-Trac) of charges due. Payment must be made to the vendor.

Performance

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

WIOA Performance Measures

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

Performance Element	Description	Performance Cohort	Reporting Cohort
Measurable Skill Gains	**Denominator** All participants enrolled in a Secondary or Training service that leads to a DOL recognized Credential at any time during a program year (July 1-June 30). **Numerator** The number that has at least one type of measurable skill gain during the program year of enrollment in a Secondary or Training service regardless of Participation date. This includes participants who continue to receive services as well as those who have participated during the reporting period (July 1-June 30) and have Exited the program. Participants who exit to Follow-Up between July-June 30 may record a skill gain while in Follow-Up status. Measurable Skill Gains include High School Diploma/GED; Educational Function Level Achievement; Secondary or Post-Secondary Achievement; Training Milestone; Skills Progression. See *Definitions for Measurable Skill Gains* below.	By June 30 of each program year a participant engages in a Training or Education Service	Program Year Q4

Additional NextGen Performance Measures

Performance Element	Description	Performance Cohort	Reporting Cohort
Assessed Work Ready	**Denominator** All participants that Exit. **Numerator** The number who are assessed at an Essential Workplace Skills score of Level 3 by the date of Exit to Follow-Up on an Exit Assessment in the following domains: Adaptability, Collaboration, Communication, Problem Solving and Self-Awareness.	By Exit date	The quarter of Exit
Utilization of Allocated Placements for Work Experience	Utilization of assigned placements for WEX in SummerWorks & year-round programming. **Denominator** Number of allocated Placements **Numerator** Number of participants placed in a Work Experience Service	By June 30 of each program year	By June 30 of each program year

Performance Element	Description	Performance Cohort	Reporting Cohort
Data Points			
At Exit Employment or Post-Secondary/Training Placement	**Denominator** All participants that Exit **Numerator** The number that are employed or in Post-Secondary Education/Training at Exit .	At Exit	At Exit

Additional Performance and Data Guidance

Case Notes

All data entered in the I-Trac system is defined as a case note. Narrative case notes entered 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.

Credentials

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

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

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

Credential	Additional Definition
High School Diploma	
GED or High School Equivalency Diploma	
Associates Degree	
Bachelor's Degree	
Post Graduate Degree	

Credential	Additional Definition
Non-DOL Approved Credential	Certificates awarded for Workforce Preparation such as Forklift, Flagger, OSHA, CPR/First Aid. These credentials do not count toward WIOA performance.
Other Recognized Diploma, Degree or Certificate	To report in this category the Credential must be awarded from an accredited Post-Secondary institution. Example: Human Resource Management certificate from Portland State University.
Occupational Certification awarded by a certification body	A Credential awarded by a certification body based on an individual demonstrating through an examination process that they have acquired the designated knowledge, skills, and abilities to perform a specific job. The examination can be either written, oral, or performance based. Examples: Microsoft, Apprenticeship, Security Certifications, Guest Services Gold, Pre-Apprenticeship Program Certification.
Occupational Skills License awarded by a government agency	A Credential awarded by a government agency that grants legal authority to do a specific job. Licenses are based on some combination of degree or certificate attainment, certifications, assessments, or Work Experience; are time-limited; and must be renewed periodically. Examples: A license from the Oregon State Board of Nursing to be a practicing RN, LPN, or CNA.
Occupational Skills Certificate Awarded by an education institution	A Credential awarded by an educational institution based on completion of all requirements for a program of study, including coursework and test or other performance evaluations. Certificates are typically awarded for life (like a degree). Certificates of attendance or participation in a short-term training (e.g., 1 day) are not in the definitional scope for these certificates. Example: Career Pathways certificate.

Essential Workplace Skills

(WIOA Youth Element 14)

Essential skills refer to the content knowledge, skills, and habits that participants need to be successful in Post-Secondary education or Training and employment that leads to a sustainable career.

An Essential skills competency matrix regional model has been adopted to identify and evaluate progress toward key proficiencies that contribute to a participant's essential skills. Proficiencies are organized into five competency domains and four associated levels.

Competency Domains

- *Academic Skills* – Proficiencies include test- and note-taking strategies; problem formulation and testing; analyzing and synthesizing information; literacy and numeracy; Post-Secondary awareness; and academic assessments including basic skills assessments, National Career Readiness Certificate assessment, College Placement exams, or college transcripts.
- *Adaptability* – Proficiencies include responds positively to change and sees change as an opportunity; open to new experiences that improve knowledge and skills; tries out new roles within a team; identifies situations and barriers that impact performance; manages stress and setbacks professionally; and learns from experiences.

- *Collaboration* – Proficiencies include offers help and ideas; considers, values and respects multiple points of view; deals appropriately with team diversity; handles conflict constructively; builds and maintains positive relationships; and encourages others to share their ideas.
- *Communication* – Proficiencies include knows when and how to use phone, email, the internet and other computer applications to communicate; uses social media properly; is an active listener; presents information that is appropriate in content; understands basic etiquette and rules in nonverbal, verbal and written communication; and writes with correct spelling and grammar.
- *Problem Solving* – Proficiencies include assesses a situation or issue; brainstorms and tests to identify possible solutions; gathers feedback from others; considers diverse viewpoints on an issue or problem; seeks guidance or support when assignments exceed ability, time demand, role or position; and seeks guidance and support to test out solutions.
- *Self-Awareness* – Proficiencies include accepts and uses feedback to enhance skills; maintains self-control; demonstrates ethical behavior; shows awareness of how behavior impacts others; learns and follows rules and guidelines; dresses appropriately for the work environment; acknowledges mistakes and takes personal responsibility; understands and performs to required expectations; and good attendance and punctuality.

Competency Matrix levels

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

Competency Assessment Tools

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

Employment Characteristic Definitions

All employment characteristics are documented through customer attestation.

Cultural Differences
An individual, at program entry, who perceives themselves as possessing attitudes, beliefs, customs or practices that influence a way of thinking, acting or working that may serve as a hinderance to employment.

Disability
As defined by Section 3 of the American with Disabilities Act WIOA of 1990: A person who has a physical or mental impairment that substantially limits one or more major life activity. This includes people who have a record of such an impairment, even if they do not currently have a disability, learning disabilities and individuals with a current or previous IEP or 504 plan.

Displaced Homemaker
Either of the following is true:

- Provided unpaid services to their family and no longer supported by that income, AND is unemployed or underemployed, AND having trouble obtaining or upgrading employment

  OR

- Provided unpaid services to their family, AND is a military spouse where income reduced for deployment, activation, relocation, spouse death or disability AND is unemployed or underemployed, AND struggling to find/upgrade employment.

Underemployed Worker
An individual who is employed and working part-time but desires full-time employment, or who is working in employment not commensurate with the individual's demonstrated level of educational and/or skill achievement.

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

Farmworker

- Migrant Farmworker
  An individual, at program entry, who is a seasonal farmworker and whose agricultural labor requires travel to a job site such that the farmworker is unable to return to a permanent place of residence within the same day.

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

Foster Care- In Foster Care or Aged Out of Foster Care

An individual who: is currently in foster care; turned 21 and aged out of foster care; or attained 16 years of age and left foster care for kinship guardianship or adoption.

Homeless

An individual who:

- Lacks a fixed, regular, and adequate nighttime residence, this includes a person who:
  - (i) is sharing the housing of another person due to loss of housing, economic hardship or a similar reason;
  - (ii) is living in a motel, hotel, trailer park, or campground due to a lack of alternative adequate accommodation;
  - (iii) is living in emergency or transitionalshelter;
  - (iv) is abandoned in a hospital; or
  - (v) is awaiting foster care placement.
- Has a primary nighttime residence that is a public or private place not designated for or ordinarily used as a regular sleeping accommodation for human beings, such as a care, park, abandoned building, bus or train station, airport or camping ground.
- Is a migratory child who is preceding 36 months was required to move from one school district to another due to changes in the parent's or parent's spouse's seasonal employment in agriculture, dairy, or fishing work.
- Is under 18 years of age and absents themselves from home or place of legal residence without the permission of their family (i.e., runaway youth).

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

Justice System Involvement

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

Long Term Unemployed

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

Pregnant or Parenting Youth

An individual who is parenting can be custodial or non-custodial. As long as the youth is within the WIOA youth age eligibility, the age when the youth became a parent does not factor into the definition of parenting. A pregnant youth is an eligible participant who is pregnant at the time of Program Registration.

Requires Additional Assistance

OSY

- Low income
- Applicant has never held a job.
- Applicant is between the ages of 18 and 24 and has never held a full-time job.
- Applicant is between the ages of 18 and 24 and has been fired from a job prior to program application.
- Applicant has quit Post-Secondary education without attaining a recognized credential.

ISY

- Applicant has never held a job.
- Applicant is between the ages of 18 and 24 and has been fired from a job prior to program application.
- Applicant is deemed at risk of dropping out of school
- Applicant has been placed on probation, suspended from secondary school, or expelled from secondary school.
- Applicant has repeated at least one secondary grade level.
- Applicant is behind the credit rate required to graduate from High School

Runaway

A minor who has left home without parental/guardian permission and stays away for two or more nights.

School Age and Not Attending School for at Least 1 Quarter

A Applicant who is within the age of compulsory school attendance (16-18) but has not attended for at least the most recent complete school year calendar quarter. In cases where schools do not use quarters local programs must use calendar year quarters.

School Drop Out

Reference: Oregon Department of Education

A student who withdrew from a Secondary Education school and did not graduate or transfer to another school that leads to graduation. Dropouts ***do not include*** students who:

- Are deceased.
- Are being home schooled.
- Are enrolled in a school district funded alternative school or hospital education program.
- Are enrolled in a juvenile detention facility.
- Are enrolled in a foreign exchange program.
- Are temporarily absent because of suspension, a family emergency, or severe health problems that prevent attendance at school.
- Received a GED certificate.
- Received an adult high school diploma from a community college.
- Dropped out of Post-Secondary.

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

Follow-Up Survey

A documented participant response during the Follow-Up period to confirm the participant's employment, education, or Training status. The survey must include information aligned with WIOA performance indicators and capture all required I-Trac data entry elements. It must also be dated by the respondent. Acceptable formats include:

- Completed digital or paper form
- Email response or text screenshot
- Case note documenting survey questions and participant responses

Measurable Skills Gain

Gain Element	Description	File Documentation
Secondary Education		
Educational Function Level (EFL) Achievement	As evidenced by one or more EFL gain on an accepted pre/post assessment. As Evidenced by passing a subtest on a State-recognized high school equivalency examination (GED).	Copy of the DOL approved assessment delivered during the program year which depicts the EFL gain from the previous assessment. Copy of the GED subtest.
High School Diploma/Equivalent/GED	As evidenced by documentation of attainment of a High School Diploma, Equivalent or GED.	Copy of the Credential
Secondary Achievement	Secondary Achievement (specific to participants attending high school) is measured by a transcript that shows the participant is meeting the State's academic standard for the school's academic period: • Quarter – 1.5+ credits • Trimester – 2.0+ credits • Semester – 3.0+ credits	Copy of the transcript which shows credits awarded during the measurement period.

Gain Element	Description	File Documentation
Post-Secondary Education and Training		
Post-Secondary Achievement	Post-Secondary Achievement is measured by a transcript that shows credit hours awarded for the period based on FT or PT student status: • If FT, 12 credit hours awarded in one semester or term. • If PT, 12 credit hours awarded in two semesters or terms during a 12-month period. If a postsecondary student completed 6 hours in the spring semester and 6 more hours in the fall semester and those semesters crossed two program years, they would not count as a skill gain in the first program year, but they would count as a skill gain in the second program year.	Copy of the transcript which shows credits awarded during the measurement period.
Training Milestone	Evidenced by satisfactory or better progress report toward established milestones from an employer or Training provider who is providing Training. **Examples:** Completion of On-the-Job Training plan; completion of one year of a Registered Apprenticeship program; completion of a term in a Career Pathways, Occupational Skills Training program or Post-Secondary education.	Copy of employer or training progress report.
Skills Progression	Evidenced by the completion of an occupational exam or by meeting occupational benchmarks in a trade for which the participant is receiving Training. **Example:** DOL recognized Credential.	Copy of Credential

Narrative Case Notes

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

Placement Data Entry and Confirmations

Employment Data Entry

Employment verification requires the collection of the following data in the Employment Information control on the Outcomes tab of I-Trac:

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

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

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

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

For the verification to be reported and used in performance tracking, the employment must be confirmed and documented in the Employment Confirmation control in I-Trac. Documentation of employment must be obtained from the participant, with the exception of State UI wage match. State UI wage match confirmations will automatically show in the Confirmation control when received from the State and may be used to verify employment without the detailed data described above.

Education and Training Placement Data Entry

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

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

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

Program Statuses

Enrolled Participant

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

Auto Exit

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

Full Program Exit

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

Global Exclusion Exit Reasons

Participants who find themselves in certain types of circumstances beyond their control and that preclude them from continuing participation in NextGen services may be manually exited from the program. When a Global Exclusion type of exit is recorded the participant will not be included in any of the performance measure denominators. Staff data entry of the exit reason in the Program Status control on the Outcomes tab in I-Trac.

- *Deceased:* A case note that documents how staff received notification is required.
- *Foster Care*–The participant is in the foster care program [as defined by 45 CFR 1355.20(a)] and has moved from the area as part of the foster care program. 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.
- *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.

Planned Exit

A point in time before a participant is Auto Exited when staff would like to begin to deliver Follow-Up services. This is a plan to Exit. Staff manually add a Planned Exit Program Status (Outcomes Tab, Program Status Control) as a trigger to lock In-Program service controls and unlock Follow-Up program service controls. A Planned Exit status can be reversed before Auto Exit, if the participant needs In-Program services again. To delete a Planned Exit staff must end, not delete, all Follow-Up services, and request Worksystems to delete the Planned Exit status. An Auto Exit status will auto populate 90 days after the Planned Exit date and the date will be the date of the last In-Program qualifying service.

Procedures for Quarterly Reporting

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

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

I-Trac Data Entry and File Documentation

Element	I-Trac Data Entry Fields	File Documentation
Q2 and Q4 After Exit Employment Placement	Outcome Tab • Employment Confirmation Control • Confirmation type of Q2 and Q4 After Exit	I-Trac Document Upload Tool. Enter a case note if a participant is unable to be contacted. ○ Employment Leave and Earnings Statements ○ Employment Verification Letter on Letterhead ○ Follow-up Survey from participant ○ Income Tax Records ○ Pay Stub ○ Payroll Slip ○ Quarterly Tax Payment Forms ○ Sales Commission Worksheet ○ State Department of Revenue or Taxation Record ○ W-2 Form ○ UI Crossmatch ▪ **RULE:** Not Selectable and automated where confirmation is confirmed by UI.
NextGen Program Application	Registration Tab	E Signature or I-Trac Document Upload Tool
Name and DOB	Registration Tab	I-Trac Document Upload Tool
Work Authorization	Other Documents Tab	I-Trac Document Upload Tool
Q2 and Q4 After Exit Post-Secondary Education / Training	Outcome Tab • Education & Training Placement and Confirmation Controls • Confirmation type of Q2 and Q4 After Exit	Data entry in the Education & Training Placement and Confirmation Controls.
Credential Attainment	Services Tab • Secondary Education & Skills Control or Training, Post-Secondary Education & Employment Skills Control Outcome Tab • Credentials Control	I-Trac Document Upload Tool. Copy of Credential or Customer Attestation through a Follow-Up survey. Customer attestation documented with a Follow-Up survey from the participant may only be used when the participant does not have the Credential document available to submit.

Element	I-Trac Data Entry Fields	File Documentation
Measurable Skill Gains	Assessment Tab • Measurable Skills Gains Control	I-Trac Document Upload Tool. See above *Definitions for Measurable Skill Gains.*
Assessed Work Ready	Assessment Tab • Essential Workplace Skills Control, Exit Assessment Scores of a WEX Supervisor assessment within prior 6 months of Exit Date can be used. An Exit Assessment type must be entered in I-Trac with those scores	Copy of Essential Workplace Skills Exit Assessment or WEX Supervisor assessment dated within prior 6 months of Exit Date.
At Exit employment or Post-Secondary/Training placement	Outcome Tab • Employment and/or Education & Training Placement and Confirmation Control • Confirmation type At Exit	I-Trac Employment Information and Confirmation or Education & Training Placement and Confirmation records. Enter a case note if a participant is unable to be contacted.
Work Experience Training Agreement	Services Tab • Work Based Training Control	Work Experience Training Agreement

Quality Job Standards

Worksystems is committed to advancing access to quality jobs for all participants served by the public workforce system to access careers with living wages, benefits and other job quality characteristics. In partnership with regional workforce boards in SW Washington and Clackamas County, Worksystems launched an initiative to develop and implement a community-based definition of a Quality Job that includes: 1) living wages; 2) worker engagement; 3) predictable hours; 4) comprehensive benefits; 5) accessible hiring and onboarding practices; and 6) training and advancement opportunities.

Using labor market data, Worksystems identified high-growth sectors and targeted occupations that align with our Quality Job definition in (1) advanced manufacturing; (2) clean energy; (3) construction; (4) early childhood education; and (5) healthcare and social assistance. These targeted occupations offer competitive starting wages, employer-sponsored benefits, and opportunities for advancement. Many targeted occupations do not require a degree, and value skills gained through training programs, On-the-Job Training, Registered Apprenticeships, military service and other lived experiences.

Career Coaching services are designed to assist participants in accessing quality job pathways to employment by educating them about Worksystems targeted sectors and targeted occupations. Ongoing guidance and training regarding Career Coaching with an emphasis on job quality and targeted occupations will be provided by Worksystems.

Contracted services focused on quality jobs include, (but aren't limited to):

- Help job seekers understand what makes a quality job—beyond just wages— and how to job search using the quality jobs framework.
- Help participants evaluate employment opportunities in Worksystems' targeted sectors and develop individualized plans that align with their unique career and education goals and circumstances.
- Help participants recognize when a job only meets some - or none - of the quality job characteristics, while explaining when a role is a useful first step toward a quality job.
- Identify and/or develop training and work experience opportunities that help participants develop essential skills as indicated by industry partners, including adaptability, communication, collaboration, analysis/solution mindset and self-awareness.

The Quality Jobs Framework is a tool to support personalized career planning. Career Coaches should use it to guide conversations about job quality and career goals. Not all job opportunities will meet every standard, but they may represent critical steps toward a quality career. Coaches play a key role in helping participants recognize quality jobs, set long-term goals, and continue progressing on their employment journey.

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

Quality Jobs Framework
Worksystems, in partnership with workforce boards in SW Washington and Clackamas County, launched an initiative to define what makes a *Quality Job* based on community input. The resulting framework highlights the following key standards:

- **Living Wages**
  Jobs that pay enough to meet basic needs, considering location and family size. Wages alone do not indicate Quality Jobs; other standards must be considered alongside.
- **Worker Engagement**
  Jobs that include worker voice through internal channels or union representation.
- **Predictable Hours**
  Jobs offering clear, reliable scheduling—whether part-time, full-time, flexible, seasonal, or with overtime options.
- **Comprehensive Benefits**
  Jobs with employer-supported benefits like healthcare, paid leave, and retirement plans, ideally with employer cost-sharing.
- **Accessible Hiring and Onboarding**
  Jobs that value diverse experiences, including military service, caregiving, apprenticeships, and on-the-job training.
- **Training and Advancement**
  Jobs with clear career pathways and/or access to structured learning such as apprenticeships.

Other Quality Job Indicators

- Labor Representation - Unionized jobs typically offer higher wages, better benefits, and stronger worker voice.
- B Corp Certification - Third-party verified companies meet high standards for worker well-being, transparency, and accountability.
- Benefit Corporation - Legally commit to purpose, accountability, and transparency—often a step toward B Corp certification.
- Employee Stock Option Program (ESOPS) - Employee-owned participants have larger retirement account balances than comparable workers nationwide and have better job security.
- Partners in Diversity - Employers aligned with this network show a commitment to equitable hiring.
- Apprenticeships – Employers who participate in Registered Apprenticeships Provide structured, paid training and career progression for job seekers.

References

- Workforce Innovation and Opportunity Act, Pub. L. 113-128
- WIOA Regulations at 20 CFR part 681
- The Workforce Investment Act (WIA) of 1998 (Pub. L. 105-220), Title I
- Training and Employment Guidance Letter (TEGL) No. 8-15: Title 1 WIOA Youth Program Guidance
- Training and Employment Guidance Letter (TEGL) No. 09-22: Workforce Innovation and Opportunity Act Title I Youth Formula Program Guidance
- Training and Employment Guidance Letter (TEGL) No. 10-16: Performance Accountability Guidance for Workforce Innovation and Opportunity Act (WIOA)
- Training and Employment Guidance Letter (TEGL) No. 14-18: Operating Guidance for WIOA
- Training and Employment Guidance Letter (TEGL) No. 21-16: WIOA Title I Youth Formula Program
- Training and Employment Notice 22-19: Technical Assistance Resources for the WIOA Youth Program
- Training and Employment Guidance Letter (TEGL) No. 23-19 Change 1: Guidance for Validating Required Performance Data Submitted by Grant Recipients of U.S. Department of Labor (DOL) Workforce Programs