

# NextGen Regional Program Standard Updates


April 2024


Have a question? Submit them via the form located on the [Knowledge Base](#). Questions are reviewed monthly by the Worksystems NextGen Team.

## Directions:

Click on the color-coded icon to see the full commentary.

## Key:

 A question & corresponding answer

 A note on changed policy

## Changes Summary:

- Removed previously required documents.
- Clarified approved standardized tests for Basic Skills Deficient.
- Updated Administrative rules for Work Experience.
- Clarified Occupational Skills Training, Pre-Apprenticeship, and Workforce Preparation Concurrent with Training definitions.
- Made edits to allowable support services, their required documentation, and clarified use of CDBG & WIOA funds.
- Credential table updated.
- Integrated stand-alone documents into RPS
  - Example: Employment Characteristics definitions
- Added “Follow-Up Survey” to allowable documentation for Credential
- Performance: Basic Skills Sufficient at Exit removed (was removed from Contracts in PY 23)

**Regional Program Standards**
**Focus:**       WorkSource Centers       Youth Program Services  
 Other:

**Topic: NextGen Youth Program**
**Date: April 1, 2024**       New       Revised      **Page 1 of 58**

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 local area are offered through an established network of Next Generation Youth (NextGen) service providers. These Regional Program Standards outline the policies, service definitions, and performance established for NextGen services. The focus of NextGen services is career pathway preparation and training that leads to career track employment.

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## Quality Jobs Initiative

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


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

Worksystems will continually engage with employers to increase quality job opportunities for populations that have been historically underrepresented in careers with elements of high job quality and build partnerships that raise job quality in meaningful ways for all residents in our region. Additional information and guidance can be found below in the Additional Performance and Data Guidance section.

## Eligibility

Service providers 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 eligibility detail.

### Out-of-School

- Age 16-24.
- Not attending any school (Secondary or Post-Secondary) as defined by State law.
- Legal to Work in the United States
- 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).
- Able to complete WIOA Youth documentation.

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Author: kishida Subject: Sticky Note Date: 4/18/2024 9:23:01 AM

Question: If a participant moves from OSY to ISY during the program, does their Education Status Change? Would the eligibility requirements for participation change if, for example, an OSY at registration enrolls in post-secondary?

Answer: Education Status (OSY vs ISY) and Eligibility Requirements is determined at the point of registration and does not change during the course of program participation.

**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.
- Legal to Work in the United States
- 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).
- 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 Deficient in Basic Literacy Skills 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, the Applicant must meet one of the low-income qualifiers outlined in *Addendum 1*. The categories for consideration include:

- The total family income for the six months prior to eligibility determination is not more than 70 percent of the Lower Living Standard Income Level (LLSIL). Family is defined as those living in the home and related by blood, marriage, or decree of court.
- 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.
- Employment Characteristics that automatically qualify an Applicant as low income: Foster Care and Homeless (which includes Runaway in its definition).

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

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**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).
- Deficient in Basic Literacy Skills (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)
- Deficient in Basic Literacy Skills
- English Language Learner
- Requires Additional Assistance to complete an education program or to secure or hold employment as evidenced by one of these criteria:
  - Applicant has never held a job.
  - Applicant is between the ages of 18 and 24 and has been fired from a job prior to program application.
  - Applicant is deemed at risk of dropping out of school.
  - 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 5% of In-School Applicants enrolled in a 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.

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 and enrollment into services can begin.

## Eligibility Documentation

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

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

### Birth Date

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

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

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Author: kishida Subject: Sticky Note Date: 4/18/2024 9:00:44 AM

Question: Regarding the "5% of In-School Applicants enrolled in a program year (July-June)", is this per the individual service provider, or all the service providers. If all the service providers, would Worksystems continue to monitor this percentage as in the current program year?

Answer: The policy applies to each individual service provider. Worksystems will continue to monitor system-wide %s to ensure compliance with this federal requirement.

Author: kishida Subject: Sticky Note Date: 4/18/2024 8:58:24 AM

Question: For age/Birth Date - Following the TEG (09-22) 4a, it appears DOB can also be 'customer attestation'. In the rare instance where a youth does not have the allowable documents, can self-attestation for DOB apply here?


Answer: No, the policy requires one of the allowable documents which reflects a birth date that supports an applicant's age. The State is reviewing TEG 09-22 and will update policy at a future date.




**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. Deficient in Basic Skills is defined as:

1. Have English reading, writing, or computing skills at or below the 8<sup>th</sup> grade level on a generally accepted and approved 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

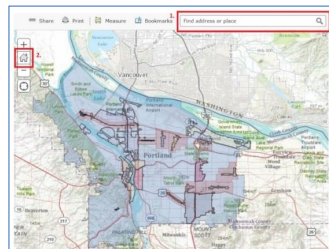
2. Unable to compute or solve problems, or read, write, or speak English at a level necessary to function on the job, in the individual’s family, or in society. This may be determined by staff during the enrollment process while working with the Applicant when at least one of the following elements are observed (and therefore assessed):
  - 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 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/M6nviQ>) to verify this requirement. Input the address in the search bar and click the search icon (1. on picture). The map will focus down to the actual street location. Once at the street location click the home icon (2. on the picture) to expand back out. If the address is within the blue area outline it is within the City Boundary. Staff attest to having verified the address via the documentation dropdown selection in the Residence control in I-Trac.



Author: kishida Subject: Sticky Note Date: 4/18/2024 9:43:13 AM

Author: kishida Subject: Sticky Note Date: 4/18/2024 9:43:42 AM  
Note: Standardized test must be administered within the last 12 months from the date of eligibility determination.

Author: kishida Subject: Sticky Note Date: 4/18/2024 9:44:52 AM  
Note: NextGen Documentation Checklist is no longer required.

Author: kishida Subject: Sticky Note Date: 4/18/2024 9:53:37 AM  
 The initial Individual Career Plan (ICP), which is attached to the Objective Assessment is not a service recorded in I-Trac. It is a required document. ICP updates are entered as services in I-Trac.

Author: kishida Subject: Highlight Date: 4/18/2024 11:49:55 AM

Author: kishida Subject: Highlight Date: 4/18/2024 11:50:00 AM

**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 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/Registration-Info>.

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)
<ol style="list-style-type: none"> <li>Sex-assigned male at birth</li> <li>US Citizen OR immigrant residing in the US between the ages of 18 and 25</li> <li>Age 18 or older</li> <li>Born on or after January 1, 1960</li> </ol>	<ol style="list-style-type: none"> <li>Sex-assigned female at birth</li> <li>Born before 1960</li> <li>Under the age of 18</li> <li>A seasonal agricultural worker on a H-2A visa</li> <li>A lawful non-immigrant on a current non-immigrant visa</li> <li>Was incarcerated / hospitalized / institutionalized continuously between 18th and 26th birthdays</li> <li>Was not living in the United States between 18th and 26th birthdays</li> <li>Was on active US Military, Coast Guard duty or a student in an Officer Procurement Program continuously between 18th and 26th birthdays</li> </ol>

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

IF Requirement is	AND Registration Status is	Then Documentation Types must be one of the following
Required	Registered	<ul style="list-style-type: none"> <li>Download the Selective Service Registration Acknowledgement Letter from <a href="https://www.sss.gov/verify/">https://www.sss.gov/verify/</a></li> <li>Selective Service Registration Card</li> <li>Stamped Post Office Receipt of Registration</li> </ul>
	Not Registered: Applicant was unaware of the requirement to register and is now age 26 or older.	<ul style="list-style-type: none"> <li>Request for Status Information Letter &amp; Supporting Documentation</li> <li>Selective Service Status Information Letter</li> </ul>
	Not Registered: Applicant willingly and lawfully chose not to register.	No document and Applicant is not eligible.
Not Required/Exempt	Not Required to Register	<ul style="list-style-type: none"> <li>Signed Application (Age/Sex at Birth)</li> <li>DD-214 Military Separation Record</li> <li>Immigrant/Non-Immigrant Allowable Documents (refer to Appendix 1)</li> <li>Records of Incarceration/ Hospitalization/ Institutionalization</li> </ul>

**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 18<sup>th</sup> birthday to their 26<sup>th</sup> birthday are exempt from registration. **However, please note:** If at any time between their 18<sup>th</sup> and 26<sup>th</sup> 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."

Author: kishida Subject: Sticky Note Date: 4/18/2024 9:40:09 AM

Question: I noticed that under 18 participants listed as female in I-Trac (exempt from selective service registration) are showing up in my Dashboard-Selective Service After Registration Report. Why?


Answer: Because customers can attest to their gender and sex and it is not validated, the Selective Service question on the outcomes tab must be answered regardless of the sex listed in the system at the time of enrollment if they turn 18 while in the program.

**Military Service**

If the Applicant was in the US Military, Coast Guard or Officer Training between their 18<sup>th</sup> and 26<sup>th</sup> 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 18<sup>th</sup> and 26<sup>th</sup> 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."

**Eligibility Determination** 

Enter all data into the Registration Tab in the I-Trac NextGen enrollment record, determine NextGen eligibility in the Registration Results and obtain Applicant signature utilizing the eSignature process in I-Trac. If an eSignature is unable to be obtained print the NextGen Application from the I-Trac Customer Documents menu for signature and upload to I-Trac.

Applicants under age 18 require a parent or guardian signature on the Application. In the case of homeless or runaway Applicants whom a parent or guardian is not available for signature staff must apply due diligence in determining that a parent or guardian is not available and if determined as fact staff may sign the Application in place of the parent or guardian. 


**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 disclosure (Standard SSN 2018-03-01) 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.

EEO/Grievance Disclosure

The Equal Opportunity Statement and Grievance Procedure (January 2024) 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. 

**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.

-  Author: kishida Subject: Sticky Note Date: 4/18/2024 11:40:47 AM  
Note: Eligibility Documentation Checklist & Eligibility Guides no longer required.
-  Author: kishida Subject: Sticky Note Date: 4/18/2024 9:43:56 AM  
Question: Is documentation needed to prove staff have applied due diligence before signing the Application in place of the parent or guardian?  
Answer: Staff signature is documentation of applied due diligence. No additional document is required, aside from the Characteristic of Homeless or Runaway documented in the Employment Characteristics Control in I-Trac.
-  Author: kishida Subject: Sticky Note Date: 4/18/2024 9:42:38 AM  
Flag: This document should be dated January 2024.

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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.

### **Participant Enrollment**

The Applicant must begin participation in NextGen services within 45 days of registration to be enrolled. 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.
- 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.
- Enter a case note that explains the reason for the transfer.
- Upload to I-Trac all eligibility and performance documentation obtained prior to the transfer date.
- Enter a transfer 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.

**Regional Program Standards**

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**Addendum 1 – WIOA Youth Eligibility**
**Reflecting Portland Metro Local Area Policy Decisions**

Eligibility	Out of school - OSY	In school - ISY
<b>Education Status (determines ISY/OSY)</b>	<ul style="list-style-type: none"> <li>Out of School – Completed HS Diploma/GED/Equivalent</li> <li>Out of School – Dropped out or expelled from High School or Less</li> <li>Out of School – School Age (16-18) and Not Attending School for at Least 1 Quarter</li> </ul>	<ul style="list-style-type: none"> <li>In School – Alternative High School for GED<sup>1</sup></li> <li>In School – Alternative High School for Diploma<sup>1</sup></li> <li>In School – High School or Less</li> <li>In School – College or Post High School Technical Training</li> </ul>
<b>Age</b>	16-24 (local policy may limit ages)	16-21 (local policy may limit ages)
<b>Legal to Work</b>	Yes	Yes
<b>Selective Service Registration</b>	Yes - where required	Yes – where required
<b>Low Income (or Low Income Waiver)</b> Defined:	Yes, IF ONLY Qualifying Employment Characteristic Type is from Low Income Category C  At least one of the following applies: <ul style="list-style-type: none"> <li>6 Month Family Income: LLSIL</li> <li>Eligible to Receive Free or Reduced Lunch</li> <li>Census Tract (High Poverty Area)</li> <li>Family is receiving one of the following Public Assistance types in last 6 months:                             <ul style="list-style-type: none"> <li>TANF</li> <li>General Assistance</li> <li>Refugee Assistance</li> <li>Supplemental Security Income (SSI, Title XVI)</li> <li>Social Security Disability Income (SSDI)</li> <li>Food Stamps (SNAP)</li> </ul> </li> <li>Auto Low Income Characteristic Type is from Category A below</li> </ul>	Yes, IF ONLY Qualifying Employment Characteristic Type is from Low Income Category C  At least one of the following applies: <ul style="list-style-type: none"> <li>6 Month Family Income: LLSIL</li> <li>Eligible to Receive Free or Reduced Lunch</li> <li>Census Tract (High Poverty Area)</li> <li>Family is receiving one of the following Public Assistance types in last 6 months:                             <ul style="list-style-type: none"> <li>TANF</li> <li>General Assistance</li> <li>Refugee Assistance</li> <li>Supplemental Security Income (SSI, Title XVI)</li> <li>Social Security Disability Income (SSDI)</li> <li>Food Stamps (SNAP)</li> </ul> </li> <li>Auto Low Income Characteristic Type is from Category A below</li> </ul>
<b>Qualifying Employment Characteristic Types</b>	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.
<b>Low Income Category A:</b> Automates Low Income Status by Definition	<ul style="list-style-type: none"> <li>Foster Care</li> <li>Homeless/Runaway</li> </ul>	<ul style="list-style-type: none"> <li>Foster Care</li> <li>Homeless/Runaway</li> </ul>
<b>Low Income Category B:</b> Low Income Status Not Required	<ul style="list-style-type: none"> <li>Aged Out of Foster</li> <li>Disabled (including learning disabilities)<sup>2</sup></li> <li>Parenting<sup>2</sup></li> <li>Pregnant</li> <li>School Dropout (High School or Less)<sup>3</sup></li> <li>School Age (16-18) and Not Attended School For at Least 1 Quarter</li> <li>Justice System Involvement<sup>4</sup></li> </ul>	
<b>Low Income Category C:</b> Low Income Status is Required if there are only characteristics from this category	<ul style="list-style-type: none"> <li>Where Education Status = Not in School – Completed HS Diploma/GED/Equivalent AND one of the following applies:                             <ul style="list-style-type: none"> <li>Deficient in Basic Literacy Skills</li> <li>English Language Learner</li> </ul> </li> <li>Requires Additional Assistance</li> </ul>	<ul style="list-style-type: none"> <li>Aged Out of Foster</li> <li>Deficient in Basic Literacy Skills</li> <li>Disabled (including learning disabilities)<sup>2</sup></li> <li>English Language Learner</li> <li>Justice System Involvement<sup>4</sup></li> <li>Parenting<sup>2</sup></li> <li>Pregnant</li> <li>Requires Additional Assistance</li> </ul>

See next page for footnotes.

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

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

**3** Per the Oregon Department of Education **dropout is a student who withdrew** from school and did not graduate or transfer to another school that leads to graduation. Dropouts do not include students who:

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

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


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Author: kishida Subject: Sticky Note Date: 4/18/2024 9:49:14 AM  
Note: This was moved from the Income Calculation Worksheet which is no longer a required document.

Author: kishida Subject: Sticky Note Date: 4/18/2024 11:40:04 AM  
Note: Income Calculation Worksheet no longer required.

## Addendum 2 – Low Income Calculation

### Household Size Definition

Two or more people who reside in the home and form one economic unit for purposes of tenancy or homeownership, regardless of whether they are legally related. 

### Family Size Definition

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

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

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

### Disability Family of One

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

### Dependent Child

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

### Independent Child

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

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

### Income Calculation

All income received by all members included in the family or household size (determined at time of application) during the six-month period prior to Application, annualized by multiplying the six-month income by two (six-month income x 2). Unless specifically identified as being excluded from the income



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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 or household should be counted and applied against the current family and household size.

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

For calculation of household income, Applicants in foster care are considered a separate household unit of one for purposes of income calculation; do not consider the Applicant's other household members in the household size calculation.

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

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WIOA Excludable Income	
Income Type	Income Type Description
Assets	Any assets drawn down as withdraws from a bank, the sale of property, a house, or a car
Capital gains	A profit from the sale of property or of an investment.
Educational Assistance	Educational financial assistance under Title IV of the Higher Education Act, Pell, Grants, Federal Supplemental Educational Opportunity Grants, Federal Work Study, Stafford, and Perkins loans
Fringe Benefits	Non-cash benefits such as: employer paid fringe benefits, food or housing received in lieu of wages, Medicare, Medicaid, food Stamps, school meals and housing assistance
Foster Care	Foster childcare payments
Military	Any amounts received as military pay or allowance by any person who served on active duty
Other Payments	Tax refunds, gifts, loans, lump-sum inheritances, one-time insurance payments or compensation for injury
Scholarship	Needs-based scholarship assistance, State, and private grant aid
Social Security (SSI)	Supplemental Security Income (SSI)
Tribal	Income derived by a member of an Indian tribe from fishing rights-related activity of the tribe, payments made to Indians under PL 98-64 ("An Act to provide those per capita payments to Indians may be by tribal governments, and for other purposes.")
Veterans	Pay or allowances previously received by any veteran (whether an applicant or a member of the applicant's family) while serving on active duty in the United States Armed Forces, payments received by a veteran for participation in National Guard service/activities, educational assistance and compensation to veterans and other eligible persons under Title 38
Vocational Rehab	Payments made to a client (except for OJT payments)
Welfare Payments	TANF, Emergency Assistance (EA), non-federally funded General Assistance (GA) and Refuge Cash Assistance (RCA)
WIOA	One Stop partners programs where income is subsidized. (e.g., work experiences, support services)

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**Addendum 3 – Selective Service**

**LIST OF ACCEPTABLE DOCUMENTS**

DO NOT send original documents.  
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**IMMIGRANTS/NONIMMIGRANTS** may present a combination of

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

Documents that Establish IDENTITY		Documents that Establish FIRST DATE OF ENTRY into the United States. Documents must cover entire duration in the United States			
LIST A	AND	First Date of Entry to U.S. after reaching 26 years of age	OR	First Date of Entry to U.S. was before turning 26 YEARS OLD Provide proof from first entry and any others.	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/N/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/N/C/D) Notice of Action displaying individual's name (Depending on the purpose and nature of the form, the I-797 may not be accepted. The I-797 for an I-765 petition is not accepted.)			
7. Department of State issued Border Crossing Card (BCC).		7. Documentation indicating residence was in another country, outside the United States. Accepted evidence with name and foreign address includes, but not limited to: a) Dated pay slip or vouchers from an employer; b) Certified copy of school records/transcript issued by a school outside the U.S.; c) Photocopies of entry or exit stamps in passport to indicate entry into another country after departing U.S.; d) Dated bank records showing transactions in your home country to indicate you were not in the U.S.			
8. Department of State issued Border Crossing Visa (BCV).					

**LIST OF ACCEPTABLE DOCUMENTS**

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

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## 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 where a Participant is matched with an employer or employee of a company.

**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 local 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 Coaching 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.

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

**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:

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

**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.

Author: kishida Subject: Sticky Note Date: 4/18/2024 9:52:38 AM  
Note: Time requirements removed.

Author: kishida Subject: Sticky Note Date: 4/18/2024 9:54:14 AM  
The initial Individual Career Plan (ICP), which is attached to the Objective Assessment is not a service recorded in I-Trac. It is a required document. ICP updates (defined here) are entered as services in I-Trac.

**Job Search Assistance**

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

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

**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.

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**Outreach and Recruitment**

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

**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 9<sup>th</sup> 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)*

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

**High School Diploma Instruction**

*(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.

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Date: April 1, 2024  
Page 25 of 58**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, Education and Employment Skills**

There are five 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.

**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 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 Programs are Oregon BOLI registered and should have at least one, if not more, documented partnership(s) with a Registered Apprenticeship Program that will assist in placing Participants who complete the Pre-Apprenticeship Program into their Registered Apprenticeship Program. If a Pre-Apprenticeship Program service also includes elements of Occupational Skills Training the service must be entered in I-Trac as both a Pre-Apprenticeship Program service and an Occupational Skills Training service. If

a Pre-Apprenticeship Program 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 Completer**

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

**Tuition Payments**

Tuition payments can be made in two ways for an enrolled NextGen Participant to support Occupational Skills Training:

**Individual Training Account (ITA)**

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

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

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

**Procurement**

To pay for an Occupational Skills Training program outside of an ITA, service providers must make the purchase following their agency procurement policy. These trainings do not have to be on the ETPL.

**Required Documentation**

An ITA must include all required documentation outlined in WSPM Regional Program Standards.

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

**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 planned, structured short-term learning and training experience that takes place at a worksite and involves work that is defined by a written, signed 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 and Verification.

**Work Experience Administrative Rules**

- Participants may be at the worksite no more than 40 hours per week (no overtime); weekly work schedule may vary but a 25-to-30-hour work week is recommended.
- Participants must receive continuous supervision and comprehensive training in their assigned job duties, safety protocols, and relevant regulations.
- A maximum of 160 hours for the total Work Experience training is allowed unless an extension of hours is approved in writing by Worksystems' contract liaison.
- A maximum of 12 weeks for the total Work Experience training is allowed unless an extension is approved in writing by Worksystems' contract liaison.
- A maximum of two Work Experience services per Participant is allowed unless an exception is approved in writing by Worksystems' Contract Liaison.
- Participants are paid at or above the current minimum wage for the Portland Metropolitan area. The rate is established by Worksystems. No Work Experience will pay a wage less than the current minimum wage.
- Wages are paid by an Employer of Record contracted by Worksystems and are paid through direct deposit, check, or pay card. Check endorsement or direct deposit may be used as the signed receipt.

- Holiday, vacation, and sick leave policies are outlined in the *Employer of Record Policies and Procedures* manual.
- The Work Experience may not displace, replace or cause a reduction of hours for any regular employee of the worksite.
- A worksite may not accept any Participant who is an immediate family member of any worksite supervisor or back up supervisor.
- All required equipment, tools and materials necessary for a Work Experience must be provided by the worksite.
- The following job duties are disallowed or prohibited:
  - Involvement in political lobbying or required religious activities.
  - Unprotected contact with hazardous materials.
  - Job duties that require proximity to dangerous chemicals.
  - Transport of the Participant or others to perform job duties using a personal vehicle.
  - Transport of others to perform job duties using a company vehicle.
  - Work on ladders over 6 feet tall.
  - Lift more than 50 lbs. without assistance.
  - Work on roofs.
  - Work underground.
  - Operate power tools/saws.
  - Work with children or provide homecare in unsupervised situations.

The Work Experience service is entered in the PDX Youth@Work fund and must be copied to the NextGen fund.

**Job Shadowing**

*(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.

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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 \$1,200. Exceptions can be made over \$1,200 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.

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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.

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.

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**WIOA Service Reporting Definitions Addendum**

Activity	Education Service <sup>1</sup>	Begin/Extend Participation <sup>2</sup>	Follow-Up <sup>3</sup>	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
Job Search Assistance	No	Yes	Yes	Services/Services
				Follow-up/Follow-up Services
Leadership Development	No	Yes	No	Services/Services
Mental Health/Drug and Alcohol Counseling	No	Yes	No	Services/Services
Post-Secondary Preparation and Transition Activities	No	Yes	Yes	Services/Services
				Follow-up/Follow-up Services
<b>Secondary Education and Skills Services</b>				
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
<b>Training, Post-Secondary Education and Employment Skills Services</b>				
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
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
<b>Work Based Training Services</b>				
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



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## Support Services

### Overview

Support services are financial assistance to offset expenses necessary for a Participant to engage in NextGen 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 grants that may provide the same support and use those available resources first.

Processes must be in place at each NextGen provider for appropriate referrals to such services as SNAP resources, community-based social services and housing agencies. Staff are responsible for assisting Participant exploration of resources from community sources and/or within the Participant's personal support system. When other resources are not available, and based on individual assessment and availability of funds, support services may be provided through NextGen program services.

Support services are considered payments and do not extend program participation; therefore, every support service must be delivered with an appropriate staff service on the same day (e.g., Career Coaching). Support services may be provided during In-Program and Follow-Up services.

### Prerequisites

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

- NextGen Registration and Enrollment
- A completed Prosperity Planner budget saved to I-Trac record that supports need.

## 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.

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

Each 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 Definitions**

**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 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

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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.whyclivewithed.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.

**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 (minimums and maximums) 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.

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Author: kishida Subject: Sticky Note Date: 4/18/2024 10:01:10 AM  
Note: New exceptions for Drug testing prohibitions added.**Housing Stability Education**

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

**Required Documentation:** An invoice from the community service provider is required. Payment must be made directly to the education provider.

**Moving Costs**

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

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

**Laptop Computer**

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

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

**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).

**Regional Program Standards**

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Page 37 of 58**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.

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**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 than other types of transportation assistance, support service funds may be used to purchase a bicycle, including an appropriate bike helmet if the Participant does not own one. If appropriate staff may require the Participant engage in a bicycle safety class or may purchase a child's helmet or seat if the bicycle transportation is being used to drop children at school or 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.

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

**Utilities**

Utility assistance may be provided to assist a Participant in stabilizing their living situation and to conduct an efficient job search, maintain employment or participate in training. This includes past due utility payments, utility deposits, internet cell phones and cell phone bills (but does not include any sort of television/cable expenses). Prepaid cell phone service may be paid for with Support Services funding.

The original bill must be provided before payment can be approved, with verification that the utilities/phone are for the Participant's personal residence or in the Participant's name (in the case of cell phones).

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

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## Stipend


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, 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. Every stipend awarded must have a clear connection to a NextGen service tracked in I-Trac.

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. The business process for Learning Opportunities is posted on the *Knowledge Base* and outlines the requirements to receive the stipend and comply with these Regional Program Standards.

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.

### Administrative Rules

Service providers must establish a written process for paying stipends to ensure proper and consistent application of policy and that fiscal procedures are followed. At minimum, these procedures must include:

- Service providers must follow business processes and procedures established by Worksystems for stipend-allowable activities and related stipend amounts.
- Each stipend payment must include a record of the Participant's engagement such as confirmation from the training provider of attendance, a certificate of training completion or credential. If none of these confirmation types are possible for a Participant in a virtual training, the Participant may provide a screen shot that shows their attendance in the relevant remote classroom. Staff must include a case 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 payments must be paid from funds during the program year in which the program engagement occurred.
- Stipends paid with NextGen contract funds are to be entered into the I-Trac Stipend Payments control.
- CDBG funds may not be used for the payment of stipends. 

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## Incentives

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.

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/procedures must include the forms of acceptable documentation to be used to validate milestone achievements for which Incentives will be paid.

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

### Incentive Rules

- Activities and corresponding milestones and planned incentives must be outlined in writing in the Participant's Individual Career Plan before the commencement of the activities.
- Planned Incentives must be tied to milestones specific to the training, Work Experience activities or employment retention goals.
- Documentation of the achieved milestone must be obtained as outlined in the NextGen service provider policy.
- Forms of Incentive payment must meet the cost rules contained in 2 CFR Part 200 (see Administrative Requirements below).

### Incentive Guidance


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

<b>Employment Milestones During In-Program</b>	<b>Times milestones can be earned</b>
Obtained un-subsidized employment	Once per program year (July-June)
Remained employed (examples 3, 6, 9, 12 months)	Defined in service provider policy
<b>Employment Milestones During Follow-Up</b>	<b>Times milestones can be earned</b>
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
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**Administrative Rules**

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

- Service providers must establish and follow an Incentive award process to initiate the expenditure with required organizational signatures for review and payment authorization.
- Incentive awards are to be paid by check payable to the Participant. Gift cards, gift certificates or retail vouchers cannot be awarded as Incentive payment.
- Participants are required to sign an acknowledgment of receipt of the Incentive. Check endorsement or direct deposit (see additional details in Support Services) may be used as the signed receipt.
- Incentive awards must be paid from funds during the program year in which the Incentive(s) milestone was achieved.
- 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. 

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**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
<b>Q2 After Exit Employment, Secondary or Post-Secondary Education or Training</b>	<p><b>Denominator</b> All enrolled Participants</p> <p><b>Numerator</b> The number employed or in Secondary or Post-Secondary Education/Training during Q2 after Exit.</p> <p><b>Note:</b> Trainings that are funded with WIOA Youth funds are in-program services and cannot be counted as a placement.</p>	Q2 after Exit	Q4 after Exit
<b>Q4 After Exit Employment, Secondary or Post-Secondary Education or Training</b>	<p><b>Denominator</b> All enrolled Participants</p> <p><b>Numerator</b> The number employed or in Secondary or Post-Secondary Education/Training during Q4 after Exit.</p> <p><b>Note:</b> Trainings that are funded with WIOA Youth funds are in-program services and cannot be counted as a placement.</p>	Q4 after Exit	Q6 after Exit
<b>Credential Attainment</b>	<p><b>Denominator</b> 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.</p> <p><b>Numerator</b> The number than earn a Credential between Participation Date and 1 year after Exit date.</p> <p><b>Note:</b> 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.</p>	1 Year after Exit	1 year after Exit

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Performance Element	Description	Performance Cohort	Reporting Cohort
Measurable Skill Gains	<p><b>Denominator</b> 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) during in-program services.</p> <p><b>Numerator</b> 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.</p> <p>Measurable Skill Gains include High School Diploma/GED; Educational Function Level Achievement; Secondary or Post-Secondary Achievement; Training Milestone; Skills Progression. See <i>Definitions for Measurable Skill Gains</i> below.</p>	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	<p><b>Denominator</b> All Participants that Exit.</p> <p><b>Numerator</b> The number who are assessed at an Essential Workplace Skills score of Level 3 by the date of Exit to Follow-Up in the following domains: Adaptability, Collaboration, Communication, Problem Solving and Self-Awareness.</p>	By Exit date	The quarter of Exit
Utilization of Allocated Slots for Work Experience	<p>Utilization of assigned slots for WEX and SummerWorks.</p> <p><b>Denominator</b> Number of allocated slots</p> <p><b>Numerator</b> Number of Participants placed in a Work Based Training Service</p>	By June 30 of each program year	By June 30 of each program year



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

**Additional Performance and Data Guidance**
**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	
Non-DOL Approved Credential	Certificates awarded for Workforce Preparation such as Forklift, Flagger, OSHA, CPR/First Aide. 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.

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Credential	Additional Definition
Occupational Certification awarded by a certification body	A Credential awarded <u>by a certification body</u> based on an individual demonstrating through an examination process that they have acquired the designated knowledge, skills, and abilities to perform a specific job. The examination can be either written, oral, or performance based. Examples: Microsoft, Apprenticeship, Security Certifications, BankWork\$, CareerWork\$ Medical, Guest Services Gold, Pre-Apprenticeship Program Certification.
Occupational Skills License awarded by a government agency	A Credential awarded <u>by a government agency</u> 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 <u>educational institution</u> based on completion of all requirements for a program of study, including coursework and test or other performance evaluations. Certificates are typically awarded for life (like a degree). Certificates of attendance or participation in a short-term training (e.g., 1 day) are not in the definitional scope for these certificates. Example: Career Pathways certificate.

**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 or family who lacks a fixed, regular, andadequate nighttime residence; this includes an individual who:

- is sharing the housing of other person due to loss of housing, economic hardship, or a similar reason;
- is living in a motel, hotel, trailer park, or campground due to a lack of alternative adequate accommodations;
- is living in an emergency or transitional shelter;
- is abandoned in a hospital ; or 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 car, park, abandoned building, bus or train station, airport, or camping ground;

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- Is a migratory youth who in the 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; or
- 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 Applicant 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**

An individual who has been unemployed for 27 or mor consecutive weeks.

**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.

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**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 homeschooled.
- 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).

**Measurable Skills Gain**

Gain Element	Description	File Documentation
<b>Secondary Education</b>		
<b>High School Diploma/Equivalent/GED</b>	As evidenced by documentation of attainment of a High School Diploma, Equivalent or GED.	Copy of the Credential
<b>Educational Function Level (EFL) Achievement</b>	As evidenced by one or more EFL gain on an accepted pre/post assessment.	Copy of the DOL approved assessment delivered during the program year which depicts the EFL gain from the previous assessment.

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Gain Element	Description	File Documentation
<b>Training</b>		
<b>Training Milestone</b>	Evidenced by satisfactory or better progress report toward established milestones from an employer or training provider who is providing training. <b>Examples:</b> 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.
<b>Skills Progression</b>	Evidenced by the completion of an occupational exam or by meeting occupational benchmarks in a trade for which the Participant is receiving training. <b>Example:</b> 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 Confirmations**
**Education and Training Placement Confirmation**

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.

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**Employment Placement Confirmation**

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

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

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

**Post-Secondary Education**

Post-Secondary Education is participation in an educational pathway beyond secondary education, including two- and four-year college programs. Post-Secondary Education is not an In Program service but is considered a placement and entered on the Outcomes Tab in I-Trac.

**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.

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- *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.

**Quality Job Standards**

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

- **Self-Sufficiency Wages**: A quality job provides sufficient income to afford a decent standard of living. For example, jobs that offer pay consistent with published self-sufficiency standards that consider family composition and cost of living.
- **Safe Working Conditions/Worker Engagement**: A quality job offers employees dignity and respect and welcomes engagement in workplace operations. For example, quality jobs uphold and enforce anti-harassment and anti-discrimination policies and provide reasonable accommodation to employees with disabilities.
- **Predictable Hours**: A quality job offers employees predictability on the number of hours they are offered per week to minimize hardship on employees and their families.
- **Comprehensive Benefits**: A quality job provides basic benefits that increase economic security, improve health and overall well-being. Quality jobs include healthcare, childcare, transportation, wellness programs and access to retirement savings programs, among other supports.
- **Accessible Hiring and Onboarding Practices**: A quality job offers transparent and accessible hiring and onboarding practices to ensure that employer and employee are set for success.

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

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

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

**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.

<b>Service Engagement</b>	Establish a process to review I-Trac management reports <i>Services by Start Date</i> and <i>Services by End Date</i> 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.
<b>Participant Employment and Education Information</b>	Ensure all Employment and Education or Training placement information is documented in the Participant's file and entered into I-Trac within 5 business days of receiving the information, including <i>At Exit</i> and <i>Q2</i> and <i>Q4</i> 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.
<b>File Documentation</b>	Ensure that Participant files always contain the approved documentation as outlined within these Regional Program Standards to avoid monitoring findings and the removal of performance gains. Establish a process to regularly review file documentation.
<b>Performance Management</b>	Establish a process to review I-Trac management reports <i>Performance</i> quarterly to ensure that denominator and numerator cohorts are accurate. Data is to be entered within 5 business days of receiving the information.

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**I-Trac Data Entry and File Documentation**

Element	I-Trac Data Entry Fields	File Documentation
<b>Q2 and Q4 After Exit Employment, or Post-Secondary Education / Training</b>	Outcome Tab <ul style="list-style-type: none"> <li>• Employment or Education Placement and Confirmation Controls</li> <li>• Confirmation type of Q2 and Q4 After Exit</li> </ul>	Enter a case note if a Participant is unable to be contacted. <ul style="list-style-type: none"> <li>○ Employment Leave and Earnings Statements</li> <li>○ Employment Verification Letter on Letterhead</li> <li>○ Follow-up Survey from Participant</li> <li>○ Income Tax Records</li> <li>○ Pay Stub</li> <li>○ Payroll Slip</li> <li>○ Quarterly Tax Payment Forms</li> <li>○ Sales Commission Worksheet</li> <li>○ State Department of Revenue or Taxation Record</li> <li>○ W-2 Form</li> <li>○ UI Crossmatch                             <ul style="list-style-type: none"> <li>▪ <b>RULE:</b> Not Selectable and automated where confirmation is confirmed by UI.</li> </ul> </li> </ul>
<b>Credential Attainment</b>	Services Tab <ul style="list-style-type: none"> <li>• Secondary Education &amp; Skills Control or Training, Post-Secondary Education &amp; Employment Skills Control</li> </ul> Outcome Tab <ul style="list-style-type: none"> <li>• Credentials Control</li> </ul>	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.
<b>Measurable Skill Gains</b>	Assessment Tab <ul style="list-style-type: none"> <li>• Measurable Skills Gains Control</li> </ul>	See above <i>Definitions for Measurable Skill Gains</i> .
<b>Assessed Work Ready</b>	Assessment Tab <ul style="list-style-type: none"> <li>• Essential Workplace Skills Control, Exit Assessment</li> </ul> Scores of a WEX Supervisor assessment within 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 6 months of Exit Date.

Author: kishida Subject: Sticky Note Date: 4/18/2024 10:26:51 AM

Author: kishida Subject: Sticky Note Date: 4/18/2024 10:30:37 AM

Question: Do we need to use the google form template provided by Worksystems. If no, what information is required on a follow up survey?

Answer: No, the example survey provided by Worksystems last year is not required. The only information needed on the follow up survey is what is asked of you in I-Trac on the outcomes tab.

Author: kishida Subject: Sticky Note Date: 4/18/2024 10:32:06 AM

Question: I noticed a Follow-Up survey is now allowed credential! Does this also work for documentation for Measurable skill gain?

Answer: No. Measurable Skill Gains require other documentation.



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Element	I-Trac Data Entry Fields	File Documentation
<b>At Exit employment or Post-Secondary/Training placement</b>	Outcome Tab <ul style="list-style-type: none"> <li>• Employment and/or Education &amp; Training Placement and Confirmation Control</li> <li>• Confirmation type At Exit</li> </ul>	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.
<b>NextGen Program Application</b>	Registration Tab	Document Upload Tool
<b>Work Experience Training Agreement</b>	Services Tab <ul style="list-style-type: none"> <li>• Work Based Training Control</li> </ul>	Work Experience Training Agreement

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## Criminal Background Requirements

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

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

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

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

### Affected Employees and Volunteers

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

- Direct service staff (may include but is not limited to Career Coaches, Pre-apprenticeship Training Program Instructors).
- Managers of NextGen programs/employees.
- Contractor volunteers that provide NextGen services to NextGen program enrolled Participants.

### Allowable Background Reports

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

- Fingerprint-based national criminal records check from a local Oregon State Police office.
- Fingerprint-based background check provided within the last two years, by a Federal or State of Oregon agency, to demonstrate the employee or volunteer's fitness to provide services under the NextGen Contract.
- Third-party vendor accredited by the Professional Background Screeners Association. The third-party vendor must provide a national criminal records report that includes review of criminal

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

### **Criminal Background Check Policy**

Contractors must develop a criminal background check policy that includes:

- Securing an allowable criminal background check utilizing one of the Allowable Background Reports listed above.
- Review of the criminal background check to determine if the background includes any of the above-listed crimes.
- If the background includes one of the above listed crimes a review of the following to determine if the Applicant/volunteer's background possess a risk to working safely with NextGen Participants:
  - The severity and nature of the crime.
  - The number of criminal offenses.
  - The time elapsed since commission of the crime.
  - The circumstances surrounding the crime.
  - The subject individual's participation in counseling, therapy, education or employment evidencing rehabilitation or a change in behavior; and
  - The police or arrest report confirming the subject individual's explanation of the crime.

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

### **Criminal Background Check Procedures**

1. Prior to hire, secure one of the Allowable Background Reports on the Applicant/potential volunteer. An Applicant/potential volunteer may not be placed in a position working with NextGen enrolled Participants until the full background check process has been completed.
2. Determine if any of the convictions listed in the Background Requirements are on the report.
3. If yes – the Contractor determines if they want to hire the Applicant/volunteer into the Affected Employees/Volunteer position.
  - Where the decision to hire is No – nothing more is required.
  - Where the decision to hire is Yes – the Contractor must complete a written justification on the Worksystems *State New Background Justification Form* outlining the reasons for allowing the Applicant/volunteer to be hired into the role and perform NextGen services. The State New Background Justification Form can be found on the Knowledge Base.
  - The State New Background Justification Form and a copy of the background report must be placed in the employee/volunteer personnel file.
  - Contractor will support all Worksystems annual program monitoring activities on compliance with these criminal background check procedures.

This page contains no comments