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Portland Metro

Regional Program Standards

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

Topic: QUEST DWG

Date: July 1, 2024	☐ **New** ☒ **Revised**	**Page 1 of 37**

The goal of the Quality Jobs, Equity, Strategy, and Training Disaster Recovery National Dislocated Worker Grant (QUEST DWG) is to enable individuals who have been adversely affected by the COVID-19 pandemic and the social and economic inequities that the pandemic exacerbated, to enter, return to, or advance in high-quality jobs in growth industries. The QUEST DWG program focuses on serving individuals from historically marginalized and underserved populations who have been disproportionately impacted such as people of color, immigrants, people with disabilities, individuals who were formerly incarcerated, women, and lower-wage workers.

Contents

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 based on data-driven and evidence-based workforce strategies.

A Quality Job helps workers achieve economic stability and mobility while prioritizing diverse representation, equitable work environments and worker voice. The Columbia-Willamette Workforce Collaborative 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 and build partnerships that increase opportunities for populations that have been historically excluded and underrepresented in careers with elements of high job quality.

Using labor-market data and this definition of a Quality Job, Worksystems has identified targeted sectors with low barrier entry that offer high-growth and high job-quality characteristics with structured career pathways. These sectors include: (1) advanced manufacturing; (2) healthcare and social assistance; (3) construction; (4) clean energy; and (5) early childhood education. Career coaching services are designed to support Worksystems' targeted sectors and assist participants in attaining or accessing pathways to employment with self-sufficiency wages and comprehensive benefits by providing awareness and education of our targeted sectors. Guidance and training regarding Career Coaching with an emphasis on job quality will be provided by Worksystems.

Eligibility

An Applicant must be registered for Selective Service (as defined below), if applicable, and meet at least one of the following eligibility criteria:

- Individuals temporarily or permanently laid off as a consequence of the COVID-19 pandemic disaster. This includes:
    - Individuals who experienced a change in work hours or shifts due to a reduced schedule of business operations.
    - Individuals who were fired or voluntarily left their job due to at least one of the following:
        - COVID-19 safety risks to their health
        - Contracting or being exposed to COVID and stayed home to quarantine/isolate or to care for a COVID-impacted individual

        - Lacking access to daycare or needing to home school a child
        - Not feeling safe in their job, in their work environment, or during their work commute due to COVID-19
        - Vaccination, testing or masking requirements

- A self-employed individual who became unemployed due to the COVID-19 pandemic disaster, or a self-employed individual who became significantly underemployed due to the COVID-19 pandemic disaster as evidenced by at least one of the following:
    - A substantial change in the need or demand for, or the ability to deliver their product or service
    - Being unable to find or retain adequate staffing, suppliers, or vendors resulting in significant impact to operations
    - Experienced a substantial change in their costs or pricing because of the COVID-19 pandemic disaster.
- Long-term unemployed individuals defined as individuals who:
    - Have been unemployed for six (6) weeks or more
    - Have never been employed
    - Have lost their employment due to incarceration
    - Lack suitable employment. This includes individuals who are:
        - Employed less than full-time and seeking full-time employment.
        - Employed but lacking predictable working hours or a set schedule
        - Employed at a position that earns below $21 an hour
        - Employed but their current job's earnings are less than their job's earnings from previous employment.
        - Employed but not receiving any type of benefits including healthcare, retirement, vacation, sick leave
        - Employed in a position that is inadequate with respect to their skills and training.
- Individuals who qualify as a WIOA Dislocated Worker. The individual must meet one of the following dislocation types:

    Terminated or Laid-off Worker
    The Applicant must meet *each of the requirements* in A, B *and* C:

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

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

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

        - Because of negative economic conditions or sudden economic impact on industries or occupations (e.g., pandemic or natural disaster impacts).
        - Because there is a decline in the Applicant's previous occupations in the local market.

- Because of circumstances that cause significant barriers to employment, such as criminal background, lack of high school diploma or GED, disability, homelessness, cultural or language barriers, older worker (55+) or deficient in basic skills.
- Because their previous industry or occupation has been eliminated or the Applicant has been unable to secure a position at a compensation level comparable to their previous occupation.
- Because they exhausted their unemployment benefits and have been unable to find a job in their previous industry or occupation.
- Because they were seasonally employed and unlikely to return because of mechanization or significant variance to normal seasonal employment patterns, resulting in uncertain return-to-work duties.

<u>Business Closed or has had a Substantial Lay-off</u>

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

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

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

<u>Self-Employed and Business Closed</u>

The Applicant must meet the following requirement:

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

Additional Guidance – Self Employed and Business Closed

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

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

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

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

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

Displaced Homemaker

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

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

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

Additional Guidance – Underemployed

Underemployed is defined as any one of the following applying to the Applicant's situation:

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

Military Spouse

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

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

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

Separating Service Member

The Applicant is a member of the Armed Forces who is separating from service to enter or re-enter the civilian labor force (being discharged). *Documentation with a DD-214 is required*.

Eligibility Documentation

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

Where Customer Attestation is the allowable source, the signed Application will be the documentation of the attestation. This will be reflected in I-Trac as "Signed Application."

Dislocated Worker

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

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

Selective Service Registration

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

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

Mail the form to:

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

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

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

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

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

Additional Selective Service Registration Notes

Incarceration/Hospitalization/Institutionalization

Applicants who were required to register but did not and can provide documentation that they were incarcerated, hospitalized and/or institutionalized from their 18th birthday to their 26th birthday are exempt from registration. **However, please note**: If at any time between their 18th and 26th birthday the Applicant was not incarcerated, hospitalized or institutionalized then they were required to register, and the exemption does not apply. If the Applicant did not register, then follow the requirements for documenting under “Required to Register and Did Not.”

Military Service

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

Required to Register and Did Not

Applicants who are required to be registered, who are over age 26, and cannot document that they are registered through one of the means listed above must complete the Selective Service System’s *Request for Status Information Letter* and attach copies of the documentation required for their reason for non-registration.

Where the *request is completed and not yet submitted* – A copy of the letter and supporting documents is to be provided to the Service Provider, and a WIOA contractor program manager must review it to determine that the Applicant has established by a preponderance of the evidence that the failure to register was not knowing and willful. If this determination is made the Request for Status Information Letter and documents are to be filed with all other eligibility documentation with the WIOA program manager approval signature, and the choice "Request for Status Information Letter & Support Documentation" selection in I-Trac is to be used.

The Applicant should be instructed to submit the Letter and documents as directed on the form for a formal determination by the Selective Service System. **Note**: It is not required that staff follow-up to assure the submission occurs nor is it required that the Selective Service System response be returned and filed. The WIOA contractor program manager is authorized to make the determination at the time of WIOA documentation.

Where the *request has been submitted and the Selective Service response received* – If the Applicant already completed the Status Information Letter Request process with the Selective Service and has their Status Information Letter determination returned from Selective Service which says that they are found to be exempt from the requirement, a copy of the Response Letter is to be maintained as documentation and "Selective Service Status Information Letter (returned from Selective Service)" selection in I-Trac is to be used.

Applicants under the age of 18

All Applicants who are under age 18 when they begin participation in QUEST DWG 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 WIOA Documentation 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.

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 QUEST DWG Application. No copies of the forms need be maintained in the Applicant 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 QUEST DWG 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 QUEST DWG 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.

Enrolled Participant

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

For Applicants under the age of 18, Contractor staff must conduct due diligence to obtain parent/guardian signature for enrollment. Where a parent/guardian is absent, an Applicant under the age of 18 may be enrolled without parent/guardian signature. Once confirmed that a parent/guardian is absent, Contractor staff sign the Application in place of a parent/guardian with title of Career Coach printed after their signature.

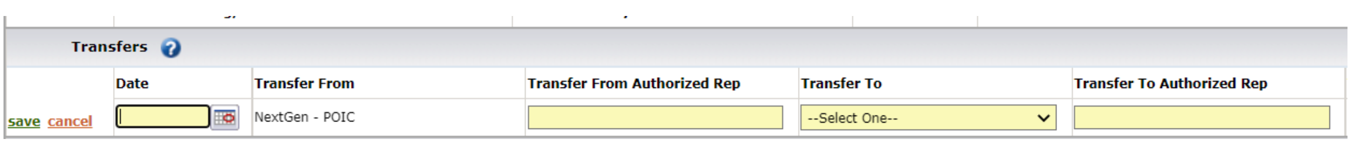
The Applicant must begin participation in program services within 45 days of the registration date. Participation begins with the first QUEST DWG funded service entered in I-Trac.

Transferring Participants

Participants may be transferred from one Service Provider to another when it is in the best interest of the Participant or when a Participant is enrolled with one Service Provider and then another Service Provider funds a Training service. In this circumstance the Participant is transferred to the Service Provider funding the Training service. When a transfer occurs, the current service provider must:

- Confirm with the Participant that they agree to the transfer and document through a case note in I-Trac. The case note must also explain the reason for the transfer.
- Obtain approval from both the current QUEST DWG Contractor program manager and the receiving QUEST DWG Contractor program manager. Document this in the Transfer control in I-Trac on the Outcomes Tab.
- Upload to I-Trac all eligibility and performance documentation obtained prior to the transfer date.
- Enter a Transfer control record on the Outcomes Tab in the I-Trac record.

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



Addendum A – Selective Service

LIST OF ACCEPTABLE DOCUMENTS

DO NOT send original documents.

COPIES ONLY

IMMIGRANTS/NONIMMIGRANTS may present a combination of

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

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

LIST OF ACCEPTABLE DOCUMENTS

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

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

Program Design and Service Delivery

There are two categories of QUEST DWG services – In Program services and Follow-Up services. Only QUEST DWG grant-funded services may be entered in the QUEST DWG record. If services are co-funded between multiple grants the Participant must be enrolled in each of the grants and the service must be copied to all I-Trac funds being utilized.

Service Definitions

In-Program Services

1:1 Individual Training Plan Development

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

- Employment goals and objectives and the combination of services that can assist the Participant in reaching them.
- Planned Training opportunities, education and/or skill development, including identification of the responsible parties.
- Support service payments and other planned activities or resources needed to accomplish the employment goals, including identification of the responsible parties.

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

Career Coaching

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

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

- Assist in identifying career and education goals.
- With the Participant, develop a plan that incorporates a customized set of QUEST DWG services and outside resources that will assist them in meeting their goals.
- Coach Participants in the personal and interpersonal (“soft” or “life”) skills required to obtain and retain employment.
- Assist Participants in identifying and securing the resources and support necessary to succeed in their training and career plans.

- Facilitate collaboration between the different service providers working with the Participant to synchronize career and education goals and align resources.
- Coach Participants in job search including resume review, interview coaching, and career advising.
- Provide regular check-ins to track Participant progress and ensure Participants retain employment, including assistance in career advancement planning, resource planning, and re-placement in employment.
- Provide and/or offer connections to employment, childcare and/or housing services which are culturally specific and/or culturally responsive, based on Participants' needs.
- Management of the tracking, documentation and reporting requirements of program participation and performance.

Job Search Assistance

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

Training, Education and Employment Skills

There are four categories of Training, Education and Employment Skills services offered through QUEST DWG – Occupational Skills Training, Pre-Apprenticeship Training Programs, Pre-Requisite Training and Workforce Preparation services. All payments for these Training services are entered in I-Trac on the Payments Tab in the Training & Education Service Payments control.

Occupational Skills Training

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

- Be on the Oregon, Washington, Idaho, or Utah State ETPL if utilizing any portion of WIOA funds (defined below).
- Be instructor-led in either an in-person or virtual format.
- Be outcome-oriented and focused on an occupational goal specified in the Participant's Training Plan. The occupational goals must be on the Portland Metro area Target Occupation List (see below for definition of this list).
- Be of sufficient duration to impart the skills needed to meet the occupational goal.
- Lead to the attainment of a recognized, US Department of Labor-defined Credential.

Training may be offered through a school or Training organization on a per-student basis or offered through a cohort agreement with Worksystems. A Training cohort is defined as one group of Participants enrolled in and attending the same Training sessions together; additionally, the cohort Training must have been procured for following Worksystems' procurement policy.

Occupational Skills Training places the Participant in the denominator for QUEST DWG Measurable Skill Gains and Credential performance.

Prerequisite Training

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

Pre-Apprenticeship Training Program

A program designed to prepare Participants to enter and succeed in a Registered Apprenticeship Program. Pre-Apprenticeship Training 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 Training Program into their Registered Apprenticeship program. Pre-Apprenticeship Training Programs are not required to be on a State ETPL and do not place the Participant in the denominator for either QUEST DWG Measurable Skill Gains or Credential performance.

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

Workforce Preparation

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

Requirements to Start Training Service

Participants who want to receive Training, Education and Employment Skills services through QUEST DWG must complete the following requirements:

- WorkSource Registration and Enrollment.
- Consultation with WorkSource training/skills team staff.
- The verification of a Participant's work authorization is required prior to the approval of an ITA. Participants must present documentation to staff that is equivalent to the Federal Form I-9 requirements. Work authorization document(s) may not be expired. If the document(s) used to verify work authorization expires during the Training the Participant may continue to engage in the Training. Refer to *Addendum C – Work Authorization* below in these Regional Program Standards.

Documentation is completed in the *Work Authorization* Control in the QUEST DWG record. Document in the *Notes* of the *Work Authorization* record what document was viewed by QUEST DWG staff from the list of documents in *Addendum C*. ***<u>A copy of the document is not required</u>***. If a work authorization document expires a new *Work Authorization* document without an expiration date must be viewed and entered in I-Trac prior to approval of any additional ITAs.

- Completion of a Prosperity Planner Budget in I-Trac.
- Individual Training Account (ITA) or Cohort Training Application (as appropriate, not required for Workforce Preparation services).

Training Start Definition

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

Training Completer Definition

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

Individual Training Account (ITA)

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

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

- The Training program must be on the Oregon, Washington, Idaho or Utah State ETPL if utilizing WIOA funds.
- The Training must prepare Participants for occupations on the Portland Metro Target Occupation List (defined below).
- The Participant meets the qualifications and training prerequisites established for the Training program by the Training provider.

Funding for Training is limited to Participants who are unable to obtain grant assistance from other sources or require assistance beyond what is available from other sources. QUEST DWG Centers must consider the availability of all sources of funds to pay for Training costs such as TANF funds, State Training funds and Federal Pell Grants.
In coordinating the use of the different funds, QUEST DWG Centers may consider the full cost of participating in Training services (using the Prosperity Planner budget), including living expenses, childcare, transportation, etc.

The Training funding package may consider the available resources to cover these costs and apply them accordingly to support the Participants' engagement in Training.

Although there is no capped dollar limit on the Training cost, an average cost per Participant of less than $3,500 is recommended.

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

- A copy of the State ETPL page (dated) depicting the selected Training.
- A copy of the Participant's Training Review form.

State Eligible Training Provider List

The statewide roster of Training programs and providers specifically certified by the State to meet the requirements of the WIOA. All Training funded with an ITA utilizing WIOA funds must be on the Oregon, Washington, Idaho or Utah State ETPL.

Portland Metro Target Occupation List

To ensure that Portland Metro Training investments have maximum impact for both job seekers and the local area's employers, Worksystems establishes a list of target occupations that forecast growth and opportunity and that are aligned with Worksystems' target sectors of clean energy, construction, early childhood education, healthcare and manufacturing. The Portland Metro area Target Occupation List focuses on investments and Training services on these identified occupations. As a result, Training services will be directly linked to in-demand occupations that provide a career path leading toward self-sufficiency. Target occupations will be identified as outlined below.

Identifying Target Occupations

Occupations must meet the following criteria to qualify as targeted occupations for investment.

- $21/hour Median Wage or above.
- Two or fewer years of post-secondary education.
- Anticipated growth over the next 10 years.
- 200+ jobs in the region.

From time to time there may be occupations that meet the criteria but are not included on the Portland Metro Target Occupations List based on relevant factors such as gathered industry intelligence. Target occupations will be reviewed and adjusted as necessary, based on changes in projected supply and demand and feedback from regional employers, Oregon Employment Department staff and partner organization staff. Exceptions may be granted by Worksystems to fund an ITA for Trainings on the State ETPL that are not related to occupations on the Portland Metro Target Occupation List on a case-by-case basis. Worksystems will take into account the individual Participant's work experience, career goals, and employment opportunities related to the Training when determining whether to make an exception. Exception requests must be submitted to the Worksystems Contract Manager via email for approval.

Pell Grant Requirements

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

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

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

Work Based Training

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

On-The-Job Training

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

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

Refer to OJT regional program standards and the OJT development manual for additional details.

PDX Metro Works

There are two Work Based Training services offered through PDX Metro Works: Work Experience (WEX) services and Paid Work Opportunities (PWO).

A WEX service provides Participants with career exposure, opportunities to practice workplace skills and work ethic and, in some instances, provide a re-connection to the workforce. WEX services are intended to prepare a Participant for future, unsubsidized employment, by matching Participants with worksites committed to providing supportive supervision and mentorship in positions aligning with a Participant's short- or long-term career goals. Participants with very limited work experience, making career changes, or with limited to no work experience in the target occupation are prioritized for services.

A PWO service is intended to match a participating worksite with a work-ready Participant who is interested in and ready for placement in an entry-level employment position within a target industry.

Both a WEX and a PWO are planned, structured short-term experiences that takes place in a business worksite and involves duties that are defined by a written, signed Training Agreement with the worksite. The Agreement outlines the expectations and responsibilities of all parties and specifies the placement position, responsibilities, duties and maximum hours allowed. A worksite may be in the private for-profit, non-profit, or public sector.

WEX and PWO placements are an employer-employee relationship with the Participant and a wage is paid. The Internal Revenue Service Fair Labor Standards Act applies. All Participants must complete all Employer of Record- required documents and processes, including but not limited to: W4 (both Federal and State) and Form I-9 and Verification.
Services provided through PDX Metro Works are to be coordinated with the PDX Metro Works program staff. Please refer to the PDX Metro Works Regional Program Standards for additional detailed information, policy and procedures related to PDX Metro Works services.

Administrative Rules
A WEX or PWO service is to be:

- No more than 40 hours per week (no overtime); weekly work schedules may vary but should not be less than 20 hours a week.
- A maximum of 240 hours for the total WEX service or 300 hours for a PWO service is allowed unless an extension of hours is approved in writing by Worksystems.
- A maximum of 16 weeks for the total WEX or PWO service is allowed unless an extension is approved in writing by Worksystems.
- Paid at or above the current minimum wage for the Portland Metropolitan area. No WEX or PWO will pay a wage less than the area minimum wage.
- Wages will be paid by an Employer of Record identified by Worksystems.
- Holiday, vacation and sick leave policies are outlined in the Employer of Record Policies and Procedures manual.

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

- The Participant or Participant's Career Coach completes an online referral form to notify the PDX Metro Works staff of the Participant's interest in the program. The referral process must clearly indicate if the Participant is being referred for a Work Experience (WEX) or a Paid Work Opportunity (PWO) placement.
- The Worksite Development Program Operator staff contacts the Participant or referring Career Coach to discuss possible placement options (WEX or PWO) and assess if the Participant is a good match for the program.
- Program Operator staff verify the Participant is enrolled in, or eligible for, the I-Trac grant program that is funding the placement.
- For Work Experience placements only, the Career Coach submits a copy of the Participant's career plan. This document is not required for a Paid Work Opportunity placement. A resume may also be required for matching to a WEX or PWO.

- The participant completes a screening with the Worksite Liaison. If the Worksite Liaison assesses that the Participant should be considered for a different placement service than what is requested in the referral form, the recommendation is to be communicated to the Participant's Career Coach, or the Participant should be referred for additional services through a WorkSource partner.
- The Participant must sign the *Participant Acknowledgement to Begin Work* form. ***This document must be signed and dated before the Participant starts a WEX or PWO.***
- The Participant completes the hiring process with the approved Employer of Record, including completion of the Form I-9 and legal to work document verification. ***The hiring process must be completed with the Employer of Record before a Participant can begin a WEX or PWO.***
- The Worksite Development Program Operator completes the PDX Metro Works I-Trac record and enrollment. The PDX Metro Works I-Trac Other Funding Source Control on the Registration Tab is used to document what funding source is being utilized to fund the WEX or PWO.

Registered Apprenticeship

A Work-Based Training program registered through the DOL and Oregon Bureau of Labor and Industries (BOLI) that connects job seekers looking to learn new skills with employers looking for qualified workers. Employers, employer associations and joint labor-management organizations, known collectively as "sponsors," provide apprentices with paid on-the-job learning and related academic instruction that reflects industry needs. The goal of the instruction is to provide workers with advanced skillsets that meet the specific needs of their employers. The apprenticeship program must be on the Oregon ETPL.

Follow-Up Services

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

Follow-Up services must be offered and made available to all Participants when a Participant is Exited to employment placement. Follow-Up services must also be made available to any Participant following Exit from the program unless the Participant declines to receive them, or the Participant cannot be located or contacted. QUEST DWG funded Support Service payments and Training services are not allowed as Follow-Up in the QUEST DWG I-Trac record. Contacting a Participant to make appointments and secure performance-related data and information does not constitute Follow-Up services and should not be reported as such.

The types of Follow-Up services provided, and the duration, must be determined based on the needs of the Participant; therefore, the type and intensity of services may differ for each Participant.

Support Services

Support Services are financial assistance to offset expenses necessary for a Participant to engage in QUEST DWG 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 Service 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 QUEST DWG program services.

Support Services are considered payments and do not extend program participation; therefore, every Support Service should be delivered with an appropriate staff service on the same day (e.g., Career Coaching). Support Services may not be provided in Follow-Up.

Prerequisites

Participants who seek Support Services must complete the following prerequisite activities:

- QUEST DWG Registration and Enrollment.
- The verification of a Participant's work authorization is required prior to providing Support Services. Participants must present documentation to staff that is equivalent to the Federal Form I-9 requirements prior to receiving Support Services. Work authorization document(s) may not be expired. Refer to *Addendum C – Work Authorization* below in these Regional Program Standards.

  Documentation is completed in the *Work Authorization* Control in the QUEST DWG record. Document in the *Notes* of the *Work Authorization* record what document was viewed by QUEST DWG staff from the list of documents in *Addendum C*. ***<u>A copy of the document is not required</u>***. If a work authorization document expires a new *Work Authorization* document without an expiration date must be entered in I-Trac prior to the payment of any additional support services.

  <u>Prerequisite Exception</u>
  When a participant does not have identification documentation to verify work authorization and where a fee is associated with securing the required identification document, a Support Service payment may be made to assist a participant in securing the required identification document if the participant has no other available resources. If determined necessary, a bus ticket may also be provided to assist a participant with transportation needs associated with securing the documentation.

Documentation of Support Service Need

The support must be necessary to enable the Participant to engage in Training, job search activities or employment. Staff must complete documentation that supports need. Documentation of need may be competed through the following methods:

- Completion of a Prosperity Planner budget

  OR

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

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

Administrative Requirements

Documentation

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

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

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

Fiscal Procedures

Each Service Provider must establish a written process to ensure proper fiscal procedures are followed, including paying from original invoices or childcare logs, securing original receipts and appropriate Participant acknowledgment of direct payments made to reimburse Participants.

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

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

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

Support Service Definitions

Service Providers may provide the following types of Support Services. If the support is not defined below it is not allowable for payment under this policy, either due to local area restrictions or because the support is not allowable by funding source(s).

> ***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, test preparation materials, testing fees and fees required for Participants enrolled and officially registered in Post-Secondary Education, Training, Workforce Preparation or ABE, ESL or GED classes.

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

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

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

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

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

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

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

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

Employment Documentation
Payment of fees required to secure or replace documentation required to complete an I-9 with an employer to secure employment.

> ***Required Documentation***: Receipts that itemize the fees necessary to obtain the approved document with staff attestation (notation and signature on receipt copy is sufficient) that the identification documentation was secured.

Housing Assistance

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

To be considered for housing assistance support, staff must determine that the situation would impede the Participant's ability to conduct an efficient job search, maintain employment or participate in Training without the housing payment assistance, and that the Participant has a plan for future payments.

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

Housing Payment

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

Required Documentation: Clear verification (copy of rental agreement, mortgage statement, voucher or detailed receipt) of charges due and Participant residency is required. For mortgage assistance the Participant must be one of the named borrowers/homeowners on the mortgage statement. For rent assistance, the address on the lease must match the Participant I-Trac record if the Participant is not named on the lease agreement. Payment must be made to the leaseholder/owner or mortgage holder.

Housing Stability Education

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

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

Housing Moving Costs

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

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

Laptop Computer

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

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

Legal Services

When necessary to assist a Participant in expunging a criminal record or to maintain legal to work documentation to secure employment or participate in a Training. Where community resources are available and the Participant eligible, those resources must be used before support service payments are utilized.

Required Documentation: Itemized invoice that clearly details the services provided and the published rate for the service. Payment must be made to the vendor.

Medical/Dental/Optical
This Includes medical/dental/optical testing/treatment, prescriptions, mental health testing, counseling. Funds may only be used for co-payments and expenses of the Participant and cannot be used for costs of family members. Due to the high cost and limited resources, efforts should be made to first utilize Oregon Health Plan, County health care resources, and/or sliding scale fee structures with providers and support service should be limited to the minimum required to permit the person to participate in Training, job search, accept employment, or maintain employment.

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

Required Documentation: Co-payments may be reimbursed to the Participant and require a receipt from the health care/service provider showing the date and amount of payment. All other payments must be made directly to the health care/service provider based on an original detailed invoice (no statements)

Professional Test/License/Organization Fees
When professional licenses/certifications/test/test preparation fees or membership/professional event registration are required or necessary to ensure a Participant obtain employment or provides increased access to employment opportunities in the associated sector. Support may include the cost for professional licenses; certifications; test fees, business, technical and professional organization fees; professional event registration fees, etc.

Required Documentation: Original receipt(s).

Relocation
When a Participant accepts a job offer at a location out of Multnomah or Washington County and more than 50 miles away, grant funds may be used to share in the cost of moving to that location (e.g., U-Haul costs, etc.).

Required Documentation: A written, bona fide job offer must be documented to qualify for relocation support. Original receipt(s) of all approved relocation expenses must be maintained with the payment record.

Tools
When Participants are required to purchase their own tools for employment or Training, this cost may be covered by support service payments. Examples include mechanic, shop, electrician tools, etc.

Tools or equipment that is supplied by the employer, e.g., industrial equipment, stationery, machinery, safety equipment, etc., *may not* be paid for with support services.

Required Documentation: Original itemized receipts that reflect the allowable and agreed upon item(s). In addition, for tool purchases for training, documentation from the Training provider of the required items is to be maintained in the file. For employment, a bona fide, written job offer that shows the requirement of employees providing their own tools or equipment (must be specific) must be provided prior to the approval of funds.

Transportation

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

Auto or Bicycle Repair

Funds may pay for repair and replacement of essential parts and safety equipment to an automobile or bicycle only if it can be verified there is no other reasonable way for the Participant to transport himself/ herself to a Training or work site. For Auto Repair, the vehicle must be titled and registered in the Participant's name, be properly insured and there must be written verification by a reputable certified mechanic that the repairs are needed.

Required Documentation: Original invoices/receipts are required for car and bike repair payments. Quotes or work orders will not be accepted for payment receipts. Auto Repair payment must be made to the invoicing certified mechanic and a copy of the auto registration, documentation of a valid driver's license, and proof of insurance card must be included with the payment record and verified to be the same vehicle on which repairs were made.

Auto Insurance

Support service payment may be provided for auto insurance coverage required by the State of Oregon or Washington and can only be justified in a situation where, without the insurance, the Participant would not be able to travel to the Training site and/or place of employment. The vehicle must be titled and registered in the Participant's name and the Participant must have a valid driver's license in their state of residence.

Required Documentation: The original insurance billing with payment directly to the insurance company is required. In addition, documentation of a valid driver's license, a copy of the auto registration, and proof of insurance card is to be included with the payment record.

Auto Registration

Costs associated with DEQ test fees, title transfer and/or registration or renewal may be paid to allow Participants to register their auto for the purposes of completing Training or securing and/or maintaining employment. Note that the Oregon Department of Motor Vehicles may require a valid driver's license and proof of auto insurance attached to the vehicle.

Required Documentation: The original registration/transfer/test receipt(s) and a photocopy of the new title and/or registration in Participant's name must be collected and maintained in the support service financial file.

Bicycle Purchase

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

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

Staff due diligence is required to determine and document:

- Using a bicycle as a means of transportation to and from the Participant's job, school or Training location is reasonable and, over time, more cost effective and convenient than other forms of transportation. Staff determine reasonableness by evaluating with the Participant things like distance, times, work schedule, long-term viability.
- The Participant does not currently own a bicycle or have other modes of transportation available.
- The purchase price is reasonable based on some form of price comparison documentation (price quotes, including refurbished when available) for the type of bicycle being purchased.
- The type of bicycle being purchased is appropriate for the intended use (e.g., distance, night riding).

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

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

Parking

When necessary, to enable the Participant to engage in career services or Training activities (e.g., college campus parking fees).

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

Public Transportation, Car Share, Fuel

Includes all modes of transportation (e.g., public transportation passes or tickets, gas for a personal vehicle, car share service, Uber/Lyft/taxi service, bicycle/scooter share service) to help Participants engage in services and activities that support Training and education, job search and/or employment

Staff are required to determine that assistance provided is not duplicated, such as a bus pass for a month and gas purchase during the same month. Additionally, funds should not pay for the monthly cost of share vehicle services but can reimburse for the month(s) that the Participant uses the service for allowable 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 or phone number (in the case of cell phones).

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

Stipends

A Stipend is a sum of money paid to Participants to help cover basic costs while they engage in eligible Portland Metro cohort Trainings or other Trainings through an Individual Training Account (ITA). All Participants in the single Training cohort must receive identical Stipends. Stipends may be paid as an hourly amount attached to program engagement or as a total sum based on the length of the Training program. There must be clear goals and expectations set forth as to what the Participant must do to earn a Stipend. Every Stipend awarded must have a clear connection to a specific Participant goal as documented in their Cohort Training Application or ITA.

Programs that include a Stipend will have business processes that comply with these Regional Program Standards requirements and outline and publish the Stipend payments available and the requirements for receiving the Stipend.

Administrative Rules

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

- Service providers must follow business processes and procedures established by Worksystems for Stipend-allowable activities and related stipend amounts.
- Participants must present documentation to staff that is equivalent to the Federal Form I-9 requirements prior to receiving Stipends. Work authorization document(s) may not be expired. Refer to *Addendum C – Work Authorization* below in these Regional Program Standards.

  Documentation is completed in the *Work Authorization* Control in the QUEST DWG record. Document in the *Notes* of the *Work Authorization* record what document was viewed by QUEST DWG staff from the list of documents in *Addendum C*. ***A copy of the document is not required***. If a work authorization document expires a new *Work Authorization* document must be viewed and entered in I-Trac prior to additional Stipend payments.
- 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 screenshot 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 screenshot option.

- Stipend payments are to be paid by check payable to the Participant, direct deposit into an account in the Participant's name or via pay card through a payment system where a specific pay card is assigned to a Participant. Gift cards, gift certificates or retail vouchers cannot be used as Stipend payment.
- Participants are required to sign an acknowledgment of receipt of the Stipend. Check endorsement or direct deposit may be used as the signed receipt (see additional details in Support Services – Administrative Requirements). Where pay cards are used, the signature is to be captured at the point the pay card is given to the Participant, with the number/card ID noted. Electronic signatures are allowed utilizing tools such as DocuSign. Further Stipend payments to the pay card do not require additional signature as it's treated as a direct deposit.
- Stipend payments must be paid from funds during the program year in which the program engagement occurred.
- Stipends are to be entered into the I-Trac Stipend Payments control in the fund being used to pay the stipend.
- 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.

Addendum C Work Authorization

Review the appropriate document(s) that a Participant would present to verify their work authorizations status for an employer. All documents must be ***unexpired if the document has a specific expiration date***. ***Do not retain copies of the document(s).***

Note: The documents on **List A** show both identity and work authorization. Participants presenting an acceptable **List A** document should not be asked to present any other document.

The **List B** document only verifies identity through a picture that matches what the person looks like (if a picture is provided on the **List B** document) and/or that the name on the **List B** document is exactly the same as what is listed on the **List C** document. Participants who choose to present a **List B** document must also present a document from **List C**. Additional guidance on work authorization documents can be found in this link: Form I-9 Acceptable Documents | USCIS

List A Documents that Establish Both Identity and Employment Eligibility	OR	List B Documents that Establish Identify	AND	List C Documents that Establish Employment Eligibility
❒ US Passport or US Passport Card		❒ Driver's license or Photo 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.		❒ A Social Security Account Number card, *unless the card includes one of the following restrictions*: 1) NOT VALID FOR EMPLOYMENT 2) VALID FOR WORK ONLY WITH INS AUTHORIZATION 3) VALID FOR WORK ONLY WITH DHS AUTHORIZATION
❒ Permanent Resident Card or Alien Registration Receipt Card (Form I-551)		❒ 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.		❒ Certification of Birth Abroad issued by the Department of State (Form FS-545) ❒ Certification of Report of Birth issued by the Department of State (Form DS-1350)
❒ Foreign passport that contains a temporary I-551 stamp or temporary I-551 printed notation on a machine-readable immigrant visa.		❒ School ID card with a photograph ❒ Voter's registration card		❒ Original or certified copy of a birth certificate issued by a state, county, municipal authority or territory of the United States bearing an official seal
❒ Employment Authorization Document that contains a photograph (Form I-766)		❒ US Military card or draft record ❒ Military dependent's ID card		❒ Native American tribal document ❒ US Citizen ID Card (Form I-197)
❒ For a nonimmigrant alien authorized to work for a specific employer because of his or her status: a. Foreign passport; and b. Form I-94 or Form I-94A that has the following: 1) The same name as the passport; and 2) An endorsement of the alien's nonimmigrant status as long as that period of endorsement has not yet expired and the proposed employment is not in conflict with any restrictions or limitations identified on the form.		❒ US Coast Guard Merchant Mariner Card ❒ Native American tribal document ❒ Driver's license issued by a Canadian government authority For persons under age 18 who are unable to present a document listed above: ❒ School record or report card ❒ Clinic, doctor or hospital record ❒ Day-care or nursery school record		❒ Identification Card for Use of Resident Citizen in the United States (Form I-179) ❒ Employment authorization document issued by Department of Homeland Security
❒ Passport from the Federated States of Micronesia (FSM) or the Republic of the Marshall Islands (RMI) with Form I-94A indicating nonimmigrant admission under the Compact of Free Association Between the United States and the FSM or RMI.				

Performance

Measure	Calculation Methodology	Performance Cohort (Measurement Period)	Reporting Cohort (Reporting Period)
Employment Rate Q2	**Denominator**: All Participants enrolled. **Numerator**: Those employed during the second quarter following the Exit quarter.	Q2 after Exit	Q4 after Exit
Employment Rate Q4	**Denominator**: All Participants enrolled. **Numerator**: Those employed during the fourth quarter following the Exit quarter.	Q4 after Exit	Q6 after Exit
Credential Attainment	**Denominator**: All Participants enrolled in an Education or Training Service any time during Participation (does not include OJT or Customized Training). **Numerator**: Those that attain a DOL recognized Credential between Participation Date and 1 year after Exit Date. A Participant who attains a High School Diploma or GED can only be counted in the Numerator if they are employed or in a Post-Secondary Education/Training Program that leads to a recognized post-secondary credential within one year after exit.	1 Year after Exit	1 Year after Exit
Measurable Skill Gain	**Denominator**: All Participants enrolled in a Secondary or Post-Secondary Education or Training Service that leads to a recognized post-secondary Credential or employment. **Numerator**: Those that achieve a measurable skill gain. Measurable Skill Gain defined as documented academic, technical, occupational, or other forms of progress towards the Credential or employment.	By June 30 for every program year Participant engages in a Training or Education Service	Program Year Q4

Additional Performance and Data Guidance

Case Notes

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

Credential Definition

In all circumstances a copy of the Credential is required to be uploaded to I-Trac to document the performance.

Credential Type	Additional Definition
High School Diploma	To report in this category the Participant must also be employed or in a Post-Secondary Education/Training Program that leads to a recognized post-secondary credential in the year following exit.
GED or High School Equivalency Diploma	To report in this category the Participant must also be employed or in a Post-Secondary Education/Training Program that leads to a recognized post-secondary credential in the year following exit.
Associates Degree	
Bachelor's Degree	
Post-Graduate Degree	
Non-DOL Approved Credential	Certificates awarded for Workforce Preparation such as Forklift, Flagger, OSHA, CPR/First Aide.
Other Recognized Diploma, Degree or Certificate	To report in this category the credential must be awarded from an accredited post-secondary institution. (e.g., a Human Resource Management certificate from Portland State University).
Occupational Certification Awarded by a certification body	A Credential awarded by a certification body based on an individual demonstrating through an examination process that they have acquired the designated knowledge, skills, and abilities to perform a specific job. The examination can be either written, oral, or performance based. (e.g., Microsoft, Apprenticeship, Security Certifications, CompTIA+, BOLI certified Pre-Apprenticeship program certificate, BankWork$, CareerWork$ Medical, Guest Services Gold).
Occupational Skills License Awarded by a government agency	A Credential awarded by a government agency that grants legal authority to do a specific job. Licenses are based on some combination of degree or certificate attainment, certifications, assessments, or work experience; are time-limited; and must be renewed periodically. (e.g., a license from the Oregon State Board of Nursing to be a practicing RN, LPN, CNA; commercial driver's license). Certificates such as OLCC server permit, food handlers or first aid certificates are not within the scope of this definition.
Occupational Skills Certificate Awarded by an education institution	A Credential awarded by an educational institution based on completion of all requirements for a program of study, including coursework and test or other performance evaluations (e.g. Career Pathways Certificate). Certificates are typically awarded for life (like a degree). Certificates of attendance (e.g., 1 day) or participation in a workforce development activity (e.g. forklift) are not in the definitional scope for these certificates.

Data Entry Requirements

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

Employment Data Entry

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

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

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

add	Employment Information				
	Start Date	End Date	Employment Type	Employer	Industry (NAICS)
edit	10/11/2022		Unsubsidized Employment	Worksystems Inc.	Administrative and Support and Waste Management and Remediation Services

add	Date	Position (ONET)	Hourly Pay	Hours/Week	Benefits
	10/11/2022	Administrative Services Managers	$15.00	20.00	No Benefits

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

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

Enrolled Participant

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

Exits

Auto-Exit

When a Participant has gone more than 90 days without a QUEST DWG funded service they will be automatically exited to Follow-Up and a *Follow-Up* Program Status will auto populate in the I-Trac record. The Exit date is the date of the last QUEST DWG funded service entered in I-Trac. After an Auto-Exit, only Follow-Up services can be provided. An Auto Exit may only be removed by Worksystems staff if a service was provided within the 90-day period that was not entered in I-Trac.

Exit to Follow-Up

A Participant is transitioned to Follow-Up when program participation goals are achieved. Exit may be manually entered in I-Trac with a *Planned Exit* Program Status, and employment information and confirmations are completed. After Exit only Follow-Up services can be provided.

Full Program Exit

At the end of one year of Follow-Up services, a Participant is automatically fully exited from the program. This means they are no longer eligible to receive QUEST DWG services funded with WIOA funds without completing eligibility and re- enrolling in a new enrollment episode. Providers may manually enter a *Full Program Exit* Program Status when a Participant requests and is in need of additional In Program services as defined above in the Services Definitions section of these Regional Program Standards. When a Full Program Exit status is entered the Participant will still fall into all QUEST DWG performance measures and data may no longer be entered in the I-Trac record. If performance data is needed to be entered in an I-Trac record with a Full Program Exit status Worksystems staff must enter it.

Global Exclusions Exit Reasons

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

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

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

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

Institutionalized: When a Participant becomes incarcerated in a correctional institution or is a resident of an institution or facility providing 24-hour support such as a hospital or treatment center during services. A case note that states how the information was received by staff is required. Absolutely no medical details or institution name should be included in the Participant file or I-Trac case note – just the notification information.

Measurable Skill Gain Definitions

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

Gain Element	Description	File Documentation
Secondary Education Achievement	Secondary Achievement (specific to Participants attending high school) is measured by a transcript that shows the Participant is meeting the State's academic standard for the school's academic period: • Quarter – 1.5+ credits • Trimester – 2.0+ credits • Semester – 3.0+ credits	Copy of the Transcript which shows credits awarded during the measurement period.
Post-Secondary Education Achievement	Post-Secondary Achievement is measured by a transcript that shows credit hours awarded for the period based on FT or PT student status: • If FT, 12 credit hours awarded in one semester or term. • If PT, 12 credit hours awarded in two semesters or terms during a 12-month period.	Copy of the Transcript which shows credits awarded during the measurement period.
Training Milestone	Evidenced by satisfactory or better progress report toward established milestones from an employer or Training provider who is providing Training. Examples: Completion of On-the-Job Training plan; completion of one year of a Registered Apprenticeship program; completion of a term in a Career Pathways or Occupational Skills Training program.	Copy of employer or Training progress report.
Skills Progression	Evidenced by the completion of an occupational exam or by meeting occupational benchmarks in a trade for which the Participant is receiving Training. Example: DOL recognized Credential.	Copy of Credential

Procedures for Quarterly Reporting

This guidance is provided to help assure performance data is reported accurately and timely and will meet Worksystems, State and Federal monitoring requirements. Establish process to review I-Trac reports regularly. At a minimum conduct quarterly reviews to ensure that Participants' engagement in services and attainment of performance is being appropriately documented in I-Trac. Data is to be entered into I-Trac within 5 business days of receiving the information.

Service Engagement

Review I-Trac Standard Report – *Services by Start Date* and *Services by End Date*. Check for service start dates and completed statuses.

Participant Credential Outcomes

Review I-Trac Standard Report – *Outcomes – Credential* to ensure that Participants' Credential attainment information is documented in I-Trac.

Participant Employment Outcomes

Review I-Trac Standard Report – *Outcomes – Employment Confirmation and Employment Information* to ensure all employment placement and confirmation information is documented in I-Trac. Only employment placements that have a Confirmation in I-Trac will be reported to support performance.

File Documentation

Ensure that Participant I-Trac Customer Documentation contains the required upload of documentation as outlined within these Regional Program Standards to avoid monitoring findings and the removal of performance gains.

Performance Management

Review QUEST DWG *WIOA Performance* and *Local Measures* reports to ensure that denominator and numerator cohorts and data are accurate and up to date.

Quality Job Standards

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

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

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

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

I-Trac Data Entry and File Documentation

Performance Element	I-Trac Data Entry Fields	File Documentation
Program Application	A completed and signed QUEST DWG program Application is required. The application is developed from the Participant registration data entered in I-Trac. Obtain an eSignature through I-Trac or print the Application from the Customer Documents link once all Registration data is entered and upload to I-Trac.	I-Trac – Customer documents
Training Completers	Services Tab • Secondary Education & Skills Control or Training, Post-Secondary Education & Employment Skills Control. • Training end date must be the completion of Training program not a term of the Training.	I-Trac – Customer documents
Training Completers Employment Rate	Services Tab • Secondary Education & Skills Control or Training, Post-Secondary Education & Employment Skills Control • Training end date must be the completion of Training program not a term of the Training. Outcomes Tab • Employment Information Control. • Employment Confirmation Control.	N/A

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