Regional Program Standards

Focus:	❑ **WorkSource Centers** ☒ **Other: Economic Opportunity Programs**	❑ **Youth Program Services**

Topic: Economic Opportunity Programs

Date: October 4, 2025	❑ **New** ☒ **Revised**	**Page 1 of 41**

Overview

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

Contents

Economic Opportunity Program Options

Portland EOP

The Portland EOP program services are designed to propel low-income people out of poverty. As a program of the EOP, the Portland EOP program follows all EOP *Regional Program Standards* except as noted below.

A Home for Everyone EOP

The A Home for Everyone (AHFE) EOP program focuses on housing stability. AHFE EOP is part of the Multnomah County Homeless Services Department's larger A Home for Everyone initiative, which is a community-wide effort to house homeless Multnomah County citizens. As a program of the EOP, the AHFE EOP program follows all EOP Program *Regional Program Standards* except as noted below.

Department of Community Justice EOP

The Department of Community Justice (DCJ) EOP program is a partnership with Multnomah County Department of Community Justice to provide EOP services and resources to eligible participants on probation or in justice diversion programs. As a program of the EOP, the DCJ EOP program follows all EOP Program *Regional Program Standards* except as noted below.

Eligibility

To participate in EOP, a participant must:

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

Standard EOP Eligibility Requirements

Age

Participants must be age 18 or over.

WIOA Adult Eligibility

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

Portland EOP Eligibility

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

Income

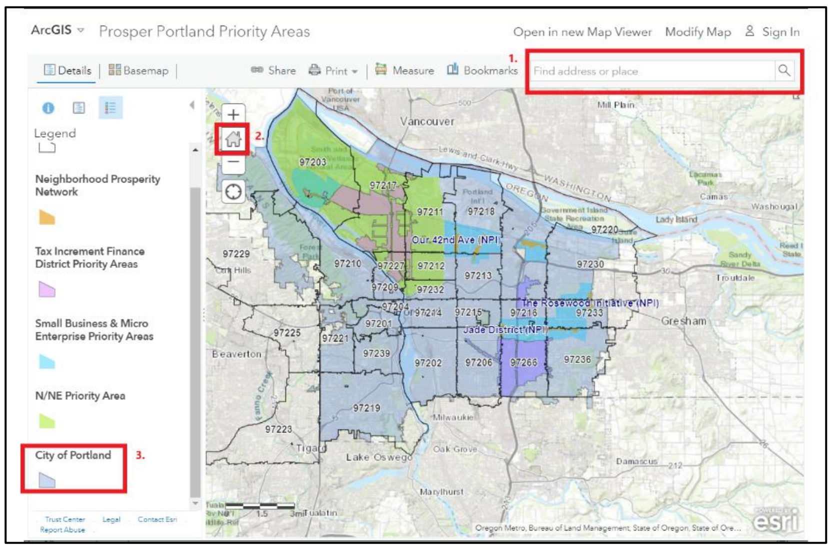
The participant's total family income for the six-months prior to eligibility determination cannot exceed 80% of the Median Family Income (MFI/AMI) for the Portland Metropolitan Statistical Area for the participant's family size. Refer to **Addendum B** below for additional information.

Utilize the Portland Housing Bureau Interactive AMI Tool to calculate 50% of the MFI: [Interactive AMI Tool | Tableau Public]() or [AMI Table]() (Both the AMI calculator and AMI table reference yearly income. In I-Trac we collect 6 months' income for EOP program eligibility). Income is calculated and documented using the I-Trac Six Month Income control and customer attestation of the information on the signed program application.

Excludable Income: Unemployment insurance payments, Child support, Welfare Payments (TANF, Emergency Assistance, non-federally funded General Assistance, Refuge Cash Assistance) and Social Security Income.

Residency

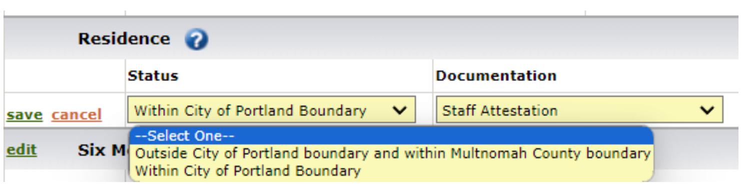
All participants must reside within the city limits of Portland with the exception of 10% of the total enrollment capacity allowed to reside outside the city limits of Portland but within the boundary of Multnomah County. Staff must look up the residence address provided by the participant in the City of Portland's ArcGIS map (link at http://bit.ly/M6nyjQ) to verify this requirement.
Input the address in the search bar (point 1. on graphic) and click the 'search' icon. The map will focus down to the actual street location. Once at the street location click the 'home' icon (point 2. on the graphic) to expand back out. If the address is within the blue/gray area outline it is within the City Boundary (point 3. on the graphic).



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

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

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



A Home for Everyone EOP Eligibility

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

Low Income

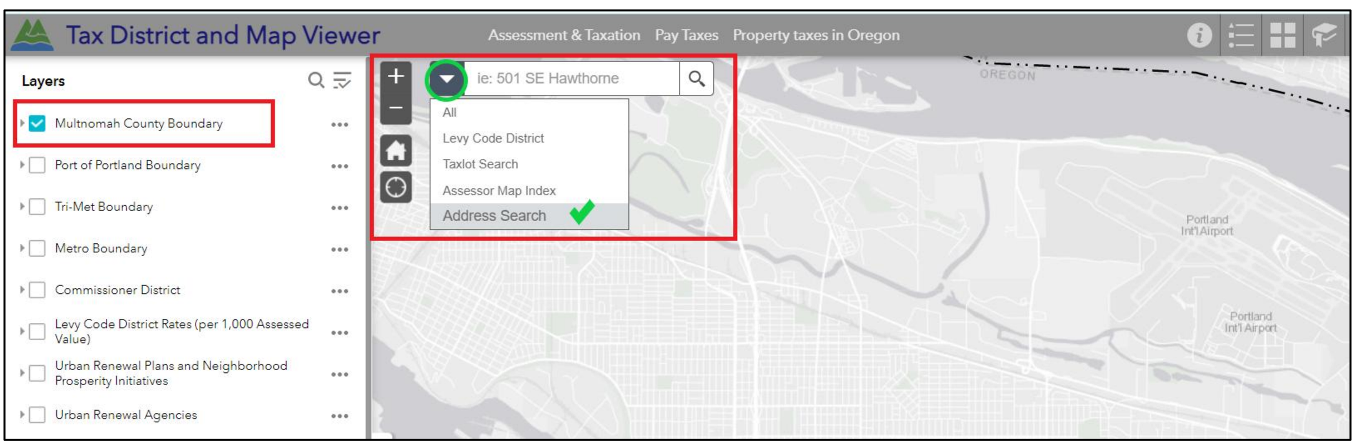
The participant's total family income for the 6 months prior to eligibility determination cannot exceed 50% of the Median Family Income (MFI) for the Portland Metropolitan Statistical Area for the participant's household size. Further, priority is to be given to households at 30% Median Family Income or below (refer to Contract Statement of Work for specific participant enrollment goals). Refer to **Addendum B** below for additional information.

Utilize the Portland Housing Bureau Interactive AMI Tool to calculate 50% of the MFI: Interactive AMI Tool | Tableau Public or AMI Table (Both the AMI calculator and AMI table reference yearly income. In I-Trac we collect 6 months income for EOP program eligibility). Income is calculated and documented using the I-Trac Six Month Income control and customer attestation of the information on the signed program application.

Excludable Income: Unemployment insurance payments, Child support, Welfare Payments (TANF, Emergency Assistance, non-federally funded General Assistance, Refuge Cash Assistance) and Social Security Income.

Residency

All AHFE EOP participants must reside within Multnomah County. Where the participant does not have a resident address, the address of the Service Provider may be used to meet this requirement (and it must be within Multnomah County). To verify a Multnomah County address staff must look up the residence address provided by the participant in the Tax District and Map Viewer map (link to map: Tax District and Map Viewer (arcgis.com) – see next page for map detail). Residency is documented as staff attestation in the Residence Control in I-Trac on the Registration Tab.



Housing Status

Participants must be either:

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

AHFE Homeless Definition

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

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

Department of Community Justice EOP Eligibility

In addition to standard EOP eligibility requirements, the DCJ EOP has the following eligibility requirements:

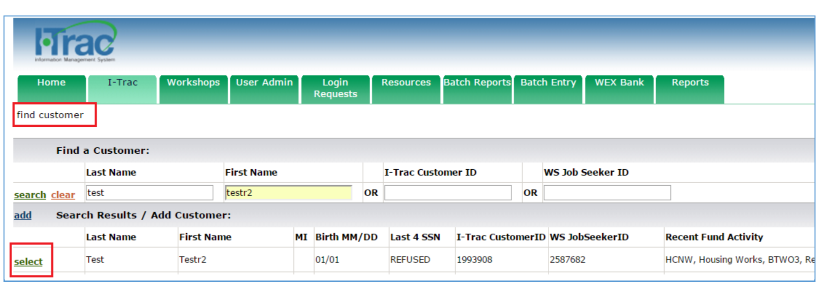
All DCJ EOP participants must be referred by the Multnomah County Department of Community Justice. Document with the referral form/email from DCJ in the participant file.

Documentation and Registration

Step 1: Complete Customer Registration

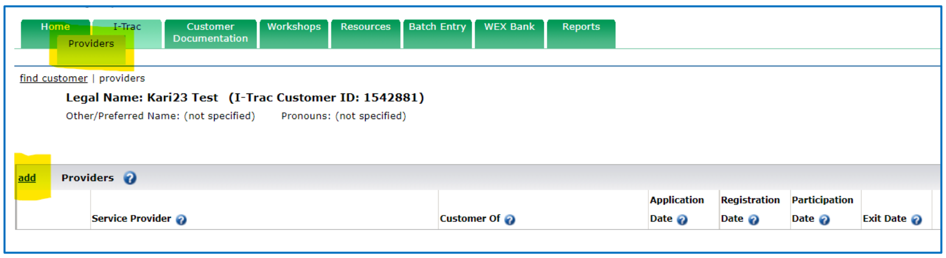
Using the “find customer” feature, search I-Trac for the Applicant using their legal name. If the Applicant is in I-Trac confirm the birthdate and last four of their social security number (if available) to verify that you are selecting the correct record. Verify that the I-Trac record has a Job Seeker ID assigned. If so, move to Step 2 below.

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



Step 2: Add WorkSource Adult Enrollment

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



Step 3: Complete WorkSource Registration Tab

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

To enroll into the WorkSource Adult program, documentation is required to verify certain information that was provided through the Applicant Registration process. Documentation must be retained in the I-Trac Document Upload Tool to be available for monitoring.

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

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

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

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

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."

Birth Date Documentation

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

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

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

Selective Service Registration Documentation

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 WorkSouce, 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.

Step 4: EOP Eligibility Determination and Documentation

Select EOP Option

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

If a participant is enrolled into EOP AHFE, Housing Status is documented as staff attestation by completing the *Household Level Attestation: Experiencing or at Imminent Risk of Long-Term Homelessness (Population A/B) form*, and in I-Trac using the AHFE Registration control. The *Population A/B form* must be uploaded to the participant's I-Trac record.

Participant Enrollment

Work Authorization

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

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

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

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

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

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

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

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

Required Disclosures

Provide and discuss the social security number (SSN) disclosure and the Contractor grievance and Equal Opportunity (EO) rights disclosure to ensure the Applicant understands their rights. The Applicant will acknowledge receipt of these disclosures when they sign the WSPM and EOP 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 EOP services and chooses not to disclose their number. Applicants must be provided the disclosure (Standard SSN April 2025) that describes how their SSN will be used and the program's commitment to confidentiality. Where the Applicant agrees to the use of their SSN for reporting purposes, the indication is noted through I-Trac on the WSPM and EOP Application for services and the consent is the Applicants' signature on the Application.

Equal Opportunity (EO)/Grievance Disclosure

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

Enrolled Participant

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

Ineligible Customers

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

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

Transferring Participants

Participants may be transferred from one EOP Service Provider to another EOP Service Provider within the same EOP program when it is in the best interest of the participant. Participants cannot be transferred between different EOP programs. When a transfer occurs, the current service provider must:

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

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

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.

Addendum B – Low Income Guidelines

Family Size Definition

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

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

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

Disability Family of One

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

Dependent Child

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

Independent Child

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

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

Income Calculation

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

Program Design

Service delivery and the subsequent performance will happen during two distinct program phases: In-Program Services and Follow-Up Services.

In-Program Services

During In-Program services participants receive Career Coaching designed to support them in overcoming barriers to employment to achieve their employment and career goals. Services occur from the point of EOP eligibility and enrollment until a participant obtains employment that meets their career plan goals and they are assessed as ready to transition to Follow-Up services. Total length of time in In-Program services will depend on participant progress in meeting career goals but cannot exceed two years.

Career Coaches are expected to maintain at least once every 90 days contact with program participants in this phase. Any unsuccessful attempts to contact the participant should be documented in the case notes. In-Program services will also cease when 90 days have elapsed without a service being provided and documented in I-Trac, and the participant will be automatically moved to Follow-Up. The transition date (Exit Date) is always the date of the last In-Program service.

Follow-Up Services

Follow-Up services are designed to assist participants in stabilizing their employment, identify employment advancement opportunities and/or secure new employment that is in line with their career plan. Follow-Up begins at the point of transition from In-Program Services (Exit) and the services will continue for a period of one year. Employment information and confirmations are tracked during Follow-Up. Unsuccessful attempts to confirm participants' employment in Q2 and Q4 should be documented in the case notes.

Service Definitions

Career Coaching – Standard

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

Elements of Career Coaching include:

- Assist in identifying career and education goals.
- With the participant, develop a plan that incorporates a customized set of WorkSource services and outside resources that will assist them in meeting their goals.
- Coach participants in the personal and interpersonal ("soft" or "life") skills required to obtain and retain employment.

- Assist participants in identifying and securing the resources and support necessary to succeed in their training and career plans.
- Facilitate collaboration between the different service providers working with the participant to synchronize career and education goals and align resources.
- Coach participants in job search activities, including resume review, interview coaching, and career advising.
- Provide regular check-ins to track participant progress and ensure participants retain employment, including assistance in career advancement planning, resource planning, and re-placement in employment.
- Provide and/or offer connections to employment, childcare and/or housing services which are culturally specific and/or culturally responsive, based on participants' needs.
- Assist participants to access rent assistance resources to support their employment and career plan.

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

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

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

During In-Program Services, the Plan should be reviewed and updated at least every 180 days as the participant completes (or is unable to complete) activities as planned and should drive program participation.

Career Coaching – Dual Coaches

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

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

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

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

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

Career Mapping

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

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.

A Home for Everyone EOP Additional Services

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

Housing Stability Case Management

Guidance and coaching dedicated to increasing the housing stability of the participant. This may include assessment of housing situation, referrals to rent assistance, housing supports or rent-well classes (whether through AHFE funding or other resources), help searching for housing or other activities that are intended to increase the participant's likelihood of finding and maintaining stable housing. Housing stability and Career Coaching should be complementary.

Training, Education and Employment Skills Services

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

EOP providers **must refer** a participant to WorkSource Portland Metro (WSPM) to fund **any type** of Training service. WSPM Training services are entered into the participant's I-Trac record in the grant funding the Training by WorkSource staff and copied into EOP records. **EOP funds cannot be used to pay for any type of Training service**, however Trainings funded through other sources outside of the WorkSource system such as a Pell grant are entered into a participant's EOP records directly by EOP staff.

There are four categories of Training, Education and Employment Skills services offered through WSPM – Occupational Skills Training, Pre-Apprenticeship Training Programs, Pre-Requisite Training and Workforce Preparation services. Services provided through the WSPM Centers are to be coordinated with Center staff. Please refer to the WorkSource Portland Metro *Regional Program Standards* for detailed information, policy and procedures related to Training services.

Occupational Skills Training

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

- Be on the Oregon, Washington, Idaho or Utah State ETPL if utilizing WIOA funds.
- 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 in these Regional Program Standards for more details on this Target Occupation 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.

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.

Prerequisite Training

Any class or Training that is required by the Training provider prior to enrolling into a Training program represented on the Oregon, Washington, Idaho or Utah State ETPL. This excludes activities defined under Workforce Preparation. The Training program must be on a State ETPL and must indicate the prerequisite course is required for entry into the Training program.

Workforce Preparation

Activities, programs or services designed to help an individual acquire any combination of the skills necessary for the successful transition into and completion of 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 and other occupational skills education leading to non-credentialed certifications that are required for entry level, health or safety employment requirements. Workforce Preparation services are not required to be on a State ETPL.

Requirements to Start Training Service

EOP participants who want to receive Training, Education and Employment Skills services through WSPM must complete the following requirements:

- Consultation with WorkSource training/skills team staff.
- 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 (for pass/no pass programs) or a passing grade (defined as D or better). Training completion must be reflected in the I-Trac record.

Individual Training Account (ITA)

A financial obligation by a WSPM Center to support classroom-based Training or instruction in a program that is on the 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 WSPM Scholarship Application.

- 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.

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 and be related to an occupation on the Portland Metro Target Occupation List.

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 by WSPM staff to the Worksystems Contract Manager via email for approval.

Work Based Training

On the Job Training (OJT)

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

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.

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.
- 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 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.
- 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 before a participant can begin a WEX or PWO.***

Support Services

Overview

Support Services are financial assistance to offset expenses necessary for a participant to engage in program activities or to seek or retain employment. Prior to considering Support Service payments, efforts must be made to identify resources in the community or from other grant resources that may provide the same support and use those available resources first.

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

Support Services are considered payments and do not extend program participation during In-Program services; therefore, every In-Program Support Service should be delivered with an appropriate staff service on the same day (e.g., Career Coaching). EOP grant-funded Support Services are available during both In-Program and Follow-Up services.

Prerequisite

Participants who seek Support Services must be enrolled in the EOP program.

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 is completed through the I-Trac EOP record that documents the participant meets the EOP eligibility element of low income as defined above in the *Eligibility* section of these *Regional Program Standards*.

Administrative Requirements

Limitations

The total amount of Support Service payments provided to the participant should not exceed $1,000 per enrolment episode. All exception requests to exceed the $1,000 limit for the participant must be approved by the Worksystems Contract Manager and the documentation of the approval must documented in a case note in I-Trac.

Documentation

All Support Services are to be tracked in the participant's I-Trac record on the Payments Tab in the fund being used to make the payment. 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 into the account.

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

Fiscal Procedures

Each 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.

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

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

Support Service Definitions

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 replace documentation required to complete an I-9 with an employer to secure employment after enrollment in EOP.

> ***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-excluding late fees) that will contribute to the participants' readiness to enter Training, education, or employment. Grant funds cannot be used to pay any mortgage expenses.

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

Housing Stability Education

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

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

Housing Moving Costs

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

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

Laptop Computer

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

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

Legal Services

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

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

Medical/Dental/Optical

This Includes medical/dental/optical testing/treatment, prescriptions, mental health testing, counseling. Funds may only be used for co-payments and expenses of the participant and cannot be used for costs of family members.

Due to the high cost and limited resources, efforts should be made to first utilize Oregon Health Plan, County health care resources, and/or sliding scale fee structures with providers and Support Service should be limited to the minimum required to permit the person to participate in Training, job search, accept employment, or maintain employment.

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

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

Professional Test/License/Organization Fees

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

Required Documentation: Original receipt(s)

Relocation

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

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

Tools

When participants are required to purchase their own tools for employment or Training, this cost may be covered by Support Service payments. Examples include mechanic, shop, electrician tools, etc.

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

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

Transportation

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

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

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

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

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

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

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

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

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

Staff due diligence is required to determine and document:

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

> ***Note:*** Once purchased no other forms of Transportation assistance may be provided via Support Services.

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

Parking

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

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

Public Transportation, Car Share, Fuel

Includes all modes of transportation (e.g., public transportation passes or tickets (including Hop Cards), gas for a personal vehicle, car share service, Uber/Lyft/taxi service, bicycle/scooter share service) to help participants engage in services and activities that support Training and education, job search and/or employment. Staff are required to determine that assistance provided is not duplicated, such as a bus pass for a month and gas purchase during the same month. Additionally, funds should not pay for the monthly cost of share vehicle services but can reimburse for the month(s) that the participant uses the service for allowable activities. This should be managed through verification of attendance logs and communication with the participant documented in file.

Required Documentation:

- A log must be kept that tracks activities supported with transportation assistance. A signed receipt for each instance of a transportation payment can replace a log as long as the tie to services is noted.
- A participant's signature acknowledging receipt of bus passes, bus ticket packages (not individual tickets), and gas card distribution is required. Signature acknowledging receipt can be obtained on the transportation log or through email confirmation from the participant.

- For other types of transportation, a detailed receipt showing date and time must support reimbursement payment and must align with activities noted in the log.
- Receipts for the total amount of a gas card are required and must show allowable and approved purchases (i.e. gasoline and not items from the mini mart).

Utilities

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

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

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

Performance

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

EOP Measures

Measure	Calculation Methodology	Performance Cohort	Reporting Cohort	I-Trac Data Entry
Attained Unsubsidized Employment by Full Program Exit	**Denominator**: All exited participants that were not employed at registration **Numerator**: Number employed by the end of Q4 following the Exit date	Between Exit Date and end of Q4 after Exit Date	Q4 after Exit	EOP record Outcomes Tab – Employment Confirmations Control – Enter "By the end of Q4 After Exit Employment Confirmation"

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

Measure	Calculation Methodology	Performance Cohort	Reporting Cohort	I-Trac Data Entry
Occupational Skills Training Starts *Portland EOP and Washington County EOP Only*	**Calculation**: Number of enrolled participants with a Training service with a status of Started. **Definition**: Training includes Occupational Skills Training; Prerequisite Training; Workforce Preparation and Pre-Apprenticeship Program services. This does not include Work Experience services	Between Participation and Exit Date	Quarter of service start date	Copy Trainings funded by WSPM from WSPM Adult/DW record into EOP record; enter Trainings funded by other sources (EOP funds not allowed) directly into EOP record
Occupational Skills Training completions *Portland EOP Only*	**Denominator**: All participants with an Occupational Skills Training, Prerequisite Training, Workforce Preparation or Pre-Apprenticeship service with a status of Started **Numerator**: Number with a Training service with a status of Completed	Between Participation and Exit Date	Quarter of the service end date	Copy Trainings funded by WSPM from WSPM Adult/DW record into EOP record; enter Trainings funded by other sources (EOP funds not allowed) directly into EOP record
Average wage for those placed in employment at Exit to Follow-Up *Portland EOP Only*	**Denominator:** All participants placed in employment at Exit to Follow-Up **Numerator:** Sum of wages for participants with a At Exit Employment Confirmation	Quarter of Exit Date	Quarter of Exit Date	EOP record Outcomes Tab – Employment Confirmations Control – Enter "At Exit Employment Confirmation"
Average wage for those placed in employment at Full Program Exit *Portland EOP Only*	**Denominator:** All participants placed in employment at Full Program Exit **Numerator:** Sum of wages for participants with an Employment Detail record in I-Trac	Quarter of Full Program Exit Date	Quarter of Full Program Exit Date	EOP record Outcomes Tab – Employment Information Control – Enter wage information

WIOA Performance Measures

Measure	Calculation Methodology	Performance Cohort	Reporting Cohort	I-Trac Data Entry
Employment Rate Q2	**Denominator**: All WIOA Adult participants enrolled **Numerator**: Those employed during the second quarter following the exit quarter	Q2 after Exit	Q4 after Exit	WS Adult record Outcomes Tab – Employment Confirmations Control – Enter “Q2 After Exit Employment Confirmation” in the WorkSource I-Trac record
Employment Rate Q4	**Denominator**: All WIOA Adult participants enrolled **Numerator**: Those employed during the fourth quarter following the exit quarter	Q4 after Exit	Q6 after Exit	WS Adult record Outcomes Tab – Employment Confirmations Control – Enter “Q4 After Exit Employment Confirmation” in the WorkSource I-Trac record

Additional Performance and Data Guidance

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

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

Additional guidance to consider when managing data for performance follows.

Data Entry Requirements

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

Case Notes

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

Enrollment Capacity

The number of participants in the In-Program phase and the number of participants in the Follow-Up phase who have received at least one In-Program or Follow-Up service within a quarter. Refer to the I-Trac Reports EOP Guide for instructions on how to calculate the enrollment capacity for quarterly reporting.

Enrolled Participant

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

Exits

Auto-Exit

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

Exit to Follow-Up

A participant is transitioned from the In-Program Phase into the Follow-Up Phase when program participation goals listed in the Career and Resource Plan are achieved. Exit is manually entered in I-Trac, and employment information and confirmation are completed. After Exit only Follow-Up services can be provided.

Full Program Exit

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

Global Exclusions for Performance

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

- **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.
- **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.

Employment Advancement

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

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

Employment Placement

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

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

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

Employment Retention

Employment Retention is defined as participants that are employed in 2nd and 4th quarters of the four quarters following the Exit to Follow-Up Date. Employment in the two quarters counted for performance do not have to be the same employment placement (employer). I-Trac documentation is acquired by entering the following Employment Confirmations: Q2, and Q4 After Exit Employment in WSPM Adult record.

Employment Data Entry

Employment verification requires the collection of the following data in the Employment Information control on the Outcomes tab (in both WS Adult and EOP records) of I-Trac:

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

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

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

Follow-Up Survey

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

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

Quality Job Standards

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

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

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

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

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

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

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

- **Living Wages**
  Jobs that pay enough to meet basic needs, considering location and family size. Wages alone do not indicate Quality Jobs; other standards must be considered alongside.
- **Worker Engagement**
  Jobs that include worker voice through internal channels or union representation.
- **Predictable Hours**
  Jobs offering clear, reliable scheduling—whether part-time, full-time, flexible, seasonal, or with overtime options.
- **Comprehensive Benefits**
  Jobs with employer-supported benefits like healthcare, paid leave, and retirement plans, ideally with employer cost-sharing.

- **Accessible Hiring and Onboarding**
  Jobs that value diverse experiences, including military service, caregiving, apprenticeships, and on-the-job training.
- **Training and Advancement**
  Jobs with clear career pathways and/or access to structured learning such as apprenticeships.

Other Quality Job Indicators

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

Training and Work-Based Training Data Entry

Occupational Skills Training, Prerequisite Training, Pre-Apprenticeship Program, Workforce Preparation and Work Based Training services funded by WorkSource or PDX Metro Works will be entered by WorkSource or PDX Metro Works staff in the WSPM Adult/DW or PDX Metro Works I-Trac record and copied to the EOP I-Trac record. Any other Trainings that are not funded by the WorkSource system such as Pell grants should be entered into the appropriate EOP record directly (EOP funds may not be used to pay for these Trainings directly). Staff should check participant's WSPM Adult/DW record before entering Training into EOP record to avoid duplicate entries.

A Home for Everyone Critical Incident Reporting

AHFE Contractors must submit an incident report to Worksystems Contract Manager as soon as possible and within three days of an incident if it involves a serious safety threat to Contractor staff or participants, elicits the Contractor's crisis or tragedy response, or impacts a Contractor's ability to deliver services. Incident Reports must include at a minimum: date of incident, time, location, program, incident description, action taken by Contractor staff, follow up, and any impact to the premises or facility. The Worksystems Contract Manager will determine the appropriate follow-up. Contractor shall fully cooperate in any fact-finding inquiry that may be conducted. A critical incident is defined as:

- Any event likely to elicit heightened public interest or litigation;
- An incident that punishes, endangers, or otherwise harms a participant or anyone onsite as a result of Contractor staff action or inaction;
- The serious injury or death of anyone onsite;
- Instances where a lifesaving device, medication, or method has been used (such as an AED, Narcan, or CPR);

- A suicide attempt or self-injury with significant intention to cause self-harm or death on the part of a participant, including any use of a requested or placed psychiatric hold;
- Criminal charges brought against a participant or staff member involving a participant or any actions taking place onsite;
- Professional misconduct by a Contractor staff member, including but not limited to sexual harassment or exploitation of a participant including any sexual contact by Contractor staff, willful infliction of pain or injury of a participant, and physical injury to a participant by other than accidental means;
- A medication error which results in a participant death, serious injury, or hospitalization;
- Significant damages to facilities or premises;
- A communicable disease outbreak; or
- Any incident deemed by Contractor to be of a critical nature

Documentation Requirements

The following are documentation requirements for all EOP projects.

Requirement	Detail	Location
Program Application	A completed and signed EOP program Application is required. The application is developed from the participant Registration data entered in I-Trac. Obtain an eSignature through I-Trac or print the Application from the Customer Documents link once all Registration data is entered and upload to I-Trac.	**I-Trac** Customer Documentation Upload
Eligibility Elements	Required documentation of program eligibility elements as noted above in these *Regional Program Standards*. The signed Application serves as documentation of all participant eligibility attestation where a separate document is not required.	**I-Trac** Signed Application Customer Documentation Upload
Career and Resource Plan	Original plan and updates. Needs to be completed withing the first 90 days of enrolment.	**I-Trac** Services Tab-Career Coaching service **Participant File** Plan/updates in I-Trac Customer Documentation Upload – Individual Plan (upload only required when referring to Rent Assistance program or when file is selected for monitoring)

Requirement	Detail	Location
Housing Status *AHFE EOP only*	Experiencing or at Imminent Risk of Long-Term Homelessness form (Form A/B) must be completed for each enrolled participant in the AHFE program.	**I-Trac** Customer Documentation Upload
Program services reflected in appropriate other grants	EOP program services are copied into other grants and records such as: Rent Assistance, Career Boost if applicable.	**I-Trac**
Required Disclosures	At the time of registration, the participant must be provided with the Social Security Number use and the EEO Disclosure notices.	**Participant File** Signed Application in Customer Documentation Upload
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 (copy of email, text confirmation or case note) • 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