

Regional Program Standards

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

Topic: PDX Metro Works

Date: October 1, 2025

New Revised

Page 1 of 22

PDX Metro Works

The PDX Metro Works program provides a suite of services delivered to a diverse population of participants and includes subsidized Work Experience (WEX) and Paid Work Opportunities (PWO) through Worksystems-funded programs and initiatives. The program includes worksite development, position matching/placement services and work-based training coaching to participants to maximize both participant and employer participation. Participating employers provide a structured work environment while wages are paid by an approved Employer of Record. A worksite may be in the private for-profit, non-profit or public sector.

Service provider functions within the PDX Metro Works program include:

- **Worksite Development Program Operator:** Responsible for the recruitment of worksites, completion of worksite documentation, management of the Worksite Agreement/Terms and Conditions as defined below in these *Regional Program Standards* and providing ongoing monitoring and support to worksites and worksite Supervisors.
- **Worksite Liaison:** Employed by the Worksite Development Program Operator and responsible for placing the participant at a worksite, interfacing with the participant on their worksite performance, interfacing with the worksite Supervisor, supporting the relationship between the worksite and participant and monitoring hours worked recorded by the Employer of Record.
- **Career Coach:** Employed by Service Providers and responsible for supporting participants through the enrollment and hiring process, advocating with the Worksite Liaison on the appropriate worksite placement decision, providing needed support services to the participant and assisting the Worksite Liaison with participant performance on the worksite as the primary interface with the participant.
- **Community Referral Partner:** Community Referral Partners include the APN and WorkSource partners. The APN are community-based organizations who sign a Memorandum of Understanding outlining a partnership with Worksystems to align resources and services so eligible community adult participants have access to WorkSource Partner services.
- **WorkSource Liaison:** Employed by the WorkSource Center Contractor and assists Career Coaches with program referrals to allow participants to enter and complete a service.
- **Employer of Record (EOR):** Contracted with Worksystems to provide payroll and benefit services in conjunction with Work Experience or Paid Work Opportunities.

Regional Program Standards

Topic: PDX Metro Works

Date: October 1, 2025

Page 2 of 22

Contents

PDX Metro Works	1
PDX Metro Works	3
Eligibility.....	3
Work Authorization	4
Enrollment.....	4
Enrolled Participant	5
Service Definitions	5
Career Coaching.....	5
Work Experience	5
Paid Work Opportunities.....	6
Work Experience and Paid Work Opportunity Administrative Rules.....	6
Worksite Development	7
Terminating Worksite Agreements	8
Participant Termination/Removal from Worksites	8
Work Experience and Paid Work Opportunities Monitoring	9
Work Experience and Paid Work Opportunities Hours.....	9
Ending Work Experiences and Paid Work Opportunities	9
Work Experience and Paid Work Opportunities Transfers	10
Support Services	10
Overview.....	10
Prerequisites.....	10
Administrative Requirements.....	11
Documentation.....	11
Fiscal Procedures.....	11
Support Services Definitions.....	11
Clothing/Personal Care.....	12
Employment Documentation	12
Professional Test/License/Organization Fees	12
Tools	12
Transportation.....	12
Utilities	15
Stipend Payments	15
Incentive	16
Performance.....	17
Work Experience Performance.....	17
Data Points	18
New Worksites Developed.....	18
All Active Worksites.....	18
New Positions Developed.....	18

Regional Program Standards

Topic: PDX Metro Works

Date: October 1, 2025

Page 3 of 22

All Active Positions	18
Additional Performance and Data Guidance	18
Case Notes.....	18
Data Entry Requirements	18
Enrolled Participant.....	18
Exit.....	18
Auto-Exit.....	18
Global Exclusions for Performance	18
Placement.....	19
Work Experience Service Statuses	19
Documentation Requirements	20
I-Trac Data Entry.....	20
File Documentation Requirements.....	20
Worksite Development File Documentation.....	20

PDX Metro Works

The PDX Metro Works program provides a suite of services delivered to a diverse population of participants and includes subsidized Work Experience (WEX) and Paid Work Opportunities (PWO) through Worksystems-funded programs and initiatives.

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 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.

Eligibility

Participants must be co-enrolled in, or determined eligible for funding from, WIOA Adult/DW and/or the discretionary grant project that is funding the WEX or PWO, following the eligibility determination and registration requirements of each grant. Refer to *Regional Program Standards* for the specific grant for additional eligibility and enrollment details and requirements.

Participants referred by a Career Coach for a WEX must be enrolled in the discretionary grant or program funding the WEX as identified by Worksystems **prior to the referral of the participant to PDX Metro Works.**

Regional Program Standards

Topic: PDX Metro Works

Date: October 1, 2025

Page 4 of 22

Work Authorization

The verification of a participant's work authorization is required. The participant must present documentation that meets the Federal Form I-9, Employment Eligibility Verification to be hired by the Employer of Record. The work authorization document(s) must not expire during the anticipated period of the WEX or PWO.

Note: Completion of the I-9 form is required prior to the participant starting their placement at a worksite.

Enrollment

The following steps must be completed to enroll a participant in the PDX Metro Works program. **Not completing all steps and acquiring all signed and dated forms and documentation prior to the start of the participant's service will result in questioned and disallowed costs.**

- The participant or participant's Career Coach completes an online referral form to notify the PDX Metro Works staff of the participant's interest in the program. The referral process must clearly indicate if the participant is being referred for a Work Experience (WEX) or a Paid Work Opportunity (PWO) placement.
- The Worksite Development Program Operator staff contacts the participant or referring Career Coach to discuss possible placement options (WEX or PWO) and assess if the participant is a good match for the program.
- Program Operator staff verify the participant is enrolled in, or eligible for, the I-Trac discretionary grant or program that is funding the placement.
- For participants determined eligible for Career Boost services, connect with ODHS E&T staff to verify any schedule or hour limitations which should be considered for the participant's WEX/PWO service.
- 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, or the participant should be referred for additional services through a WorkSource partner.
- The participant must sign the *Participant Acknowledgement to Begin Work* form. **This document must be signed and dated before the participant starts a WEX or PWO.**
- The participant completes the hiring process with the approved Employer of Record, including completion of the Form I-9 and legal to work document verification. **The hiring process must be completed before a participant can begin a WEX or PWO.**
- The Worksite Development Program Operator completes the PDX Metro Works I-Trac record and enrollment. The PDX Metro Works I-Trac Other Funding Source Control on the Registration Tab is used to document what funding source is being utilized to fund the WEX or PWO.

Regional Program Standards

Topic: PDX Metro Works

Date: October 1, 2025

Page 5 of 22

Enrolled Participant

Once all elements of eligibility determination and Registration have been completed, the Applicant must begin participation in program services within 90 days of the I-Trac Registration date. Participation begins with the first PDX Metro Works service entered into I-Trac.

Service Definitions

Career Coaching

While the participant is enrolled in PDX Metro Works, the Worksite Liaison will provide the following elements of Career Coaching:

- Coach participants in the personal and interpersonal (“soft” or “life”) skills required to successfully participate in the WEX or PWO.
- Provide regular check-ins to track participant progress and ensure participant successfully participates in and completes WEX or PWO activities. This includes supporting timesheet completion on the required schedule.
- For participants receiving Career Coaching through additional programming, maintain communication with Career Coaches regarding participant performance.

Work Experience

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

The WEX is a planned, structured, short-term learning/training experience that takes place at a worksite and involves duties defined by a written, signed *Training Agreement* with the worksite. The *Work Experience Training Agreement* outlines the expectations and responsibilities of all parties and specifies learning objectives and criteria for demonstrating learning and skills gained. Worksites may be in the private for profit, non-profit or public sector.

The WEX is an employer-employee relationship with the participant, and a wage must be paid. The Internal Revenue Service (IRS) Fair Labor Standards Act (FLSA) 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.

The WEX service is entered into the PDX Metro Works fund and must be copied to other relevant I-Trac funds being used to fund the WEX. For EOP or NextGen enrolled participants the WEX is also copied to the EOP or NextGen I-Trac record.

Regional Program Standards

Topic: PDX Metro Works

Date: October 1, 2025
Page 6 of 22

Paid Work Opportunities

A Paid Work Opportunity (PWO) is intended to match a participating worksite with a work-ready participant who is interested in an entry-level position within a target industry. A PWO is a planned, short-term experience that takes place at a worksite and involves work that is defined by a written, signed *Training Agreement* with the worksite. The *Work Experience Training Agreement* outlines the expectations and responsibilities of all parties and specifies the PWO position and maximum hours allowed. Worksite eligibility is determined by Worksystems. The PWO is an employer-employee relationship with the participant, and a wage must be paid. The Internal Revenue Service (IRS) Fair Labor Standards Act (FLSA) 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.

The PWO service is entered into the PDX Metro Works fund and must be copied to other relevant I-Trac funds being used to fund the PWO. For EOP enrolled participants the PWO is also copied to the EOP I-Trac record. For Career Boost enrolled participant the PWO is also copied to the Career Boost I-Trac record.

Work Experience and Paid Work Opportunity Administrative Rules

- A WEX or PWO is no more than 40 hours per week (no overtime); weekly work schedules may vary but should not be less than 20 hours a week.
- Participants in the WEX or PWO must receive regular supervision and comprehensive training on position duties, safety protocols and relevant regulations.
- A maximum of 240 hours for the total WEX service is allowed unless an extension of hours is approved in writing by Worksystems.
- A maximum of 300 hours for the total PWO is allowed unless an extension of hours is approved in writing by Worksystems' Contract Liaison.
- A maximum of 16 weeks for the total WEX or PWO is allowed unless an extension is approved in writing by Worksystems.
- Any WEX or PWO service which will be copied to Career Boost must be pre-approved by ODHS.
- All WEX and PWO services must pay at or above the current minimum wage for the Portland Metropolitan area. No WEX or PWO will pay a wage less than the minimum wage. Worksystems establishes the WEX pay rate.
- Wages will be paid by an Employer of Record identified by Worksystems.
- When a PWO participant is eligible for a bilingual wage differential, the *Position Description* must clearly state what language skills are needed for the position and the participant must meet those requirements.
- Holiday, vacation and sick leave policies are outlined in the Employer of Record Policies and Procedures manual.
- The WEX or PWO may not displace, replace or cause a reduction of hours for any regular employee of the worksite.
- A worksite may not accept any participant who is an immediate family member of any worksite supervisor or back up supervisor.
- A worksite may not accept any participant currently enrolled for program services at the worksite.

Regional Program Standards

Topic: PDX Metro Works

Date: October 1, 2025
Page 7 of 22

- All required equipment, tools and materials necessary for a WEX or PWO must be provided by the worksite.
- All worksites must be physically located in Multnomah or Washington County.
- The following job duties are disallowed or prohibited:
 - Involvement in political lobbying or required religious activities
 - Unprotected contact with hazardous materials
 - Job duties that require proximity to dangerous chemicals
 - Transport of self or others to perform job duties using a personal vehicle
 - Transport of others to perform job duties using a company vehicle
 - Work on ladders over 6 feet tall
 - Lift more than 50 lbs. without assistance
 - Work on roofs, underground or on or under the water
 - Operate power tools/saws
 - Work with children or provide homecare in unsupervised situations

The following require Worksystems written approval:

- Exceptions to the maximum total WEX or PWO hours or total weeks worked.
- Exceptions to the pay rate.
- A WEX or PWO hosted at any Worksystems Contractor organization.
- A WEX hosted at a worksite that is currently or previously participated in a Paid Work Opportunity program.

In addition, the following job duties require pre-approval from Worksystems and/or the Employer of Record:

- Be left alone at worksites without a supervisor present
- Using a company vehicle to perform job duties
- Handle human waste or bodily fluids
- Positions that include childcare or patient care
- Operate a motor vehicle or machinery (see driving policy & Worksite Agreement).
- All positions that include remote or hybrid work experience environments
- Performing duties outside of a worksite managed by worksite operator (i.e., home visits)

To obtain approval for positions that require any of the above job duties, position descriptions must list the required safety measures and a training plan to prepare the participant for their WEX or PWO.

Worksite Development

When developing the WEX or PWO worksite, the following steps must be completed before a participant can begin the WEX or PWO service. **All forms must be signed and dated prior to the start of the WEX or PWO service.**

- The Worksite Liaison and worksite must complete and sign a *Worksite Agreement*.
- The Worksite Liaison must conduct an onsite visit to the worksite to complete a *Worksite Verification Checklist*, ensure compliance with BOLI regulations, child labor laws when applicable, and appropriateness for participant placement.

Regional Program Standards

Topic: PDX Metro Works

Date: October 1, 2025
Page 8 of 22

- The Worksite Liaison must complete a *Position Description* which details, at a minimum, worksite name and address, worksite Supervisor name and contact information, desired skills, type of work, any other requirements and schedule. For Work Experiences only, the *Position Description* must not replicate an existing job description at the worksite; it must be unique to the Work Experience position. For Paid Work Opportunities only, position descriptions may mirror positions as the worksite but must be modified to exclude any disallowed job duties.
- If a single worksite intends to offer multiple unique positions, each must have its own *Position Description* clearly outlining the distinct duties and position title.
- The worksite and position must be established and approved with the Employer of Record.
- The Worksite Liaison must train and advise worksite Supervisors on their role and ensure that they know and comply with adult and child labor laws.
- The Worksite Liaison reviews the *Position Description* and completes the *Work Experience Training Agreement* with the participant and Worksite Supervisor. **The Work Experience Training Agreement must be signed and dated by the participant, Worksite Supervisor and Worksite Liaison prior to the start of the WEX or PWO service.**
- Share completed *Work Experience Training Agreement* with assigned Career Coach (WEX services only), participant and Worksite Supervisor within 10 days of the Work Experience start date. Best practice is to share with all parties upon completion of the document.

Terminating Worksite Agreements

A *Worksite Agreement* may be revoked at any point if the worksite violates a material term of the Agreement such as displacement of an existing employee, nepotism, violation of regulations governing employment of a minor, significant safety violations, failure to adequately supervise the participant, failure to report worksite accidents or failure to report participant work hours in a timely and accurate manner.

Any violation of employment law will result in immediate termination of the *Worksite Agreement*. Terminated Worksites may be subject to a one-year minimum sanction from participating in the PDX Metro Works program.

Participant Termination/Removal from Worksites

Participants violating worksite regulations or not adhering to their responsibilities as outlined in the *Work Experience Training Agreement* may be suspended or terminated.

While the worksite Supervisors may suspend or remove a participant from their worksite for due cause, final termination of the participant is performed by the Worksite Development Program Operator and Employer of Record.

Regional Program Standards

Topic: PDX Metro Works

Date: October 1, 2025
Page 9 of 22

Work Experience and Paid Work Opportunities Monitoring

Throughout the duration of the WEX or PWO, the Worksite Liaison will regularly monitor the participant's progress. This requires collecting information from the worksite, the participant's Career Coach (WEX services only) and/or the participant about the WEX or PWO.

Worksite Liaisons must monitor worksites for compliance with the *Work Experience Training Agreement*, program rules and expectations of providing a safe, secure, and positive work environment conducive to professional growth and development. Any time a participant expresses concerns about the safety of their worksite environment, OSHA violations or Equal Employment, Americans with Disability Act, and/or Title VII regulations specific to worksites (e.g., hostile work environments, harassment, etc.), the Employer of Record and Worksystems must be notified within 24 hours.

For WEX services only, if performance issues arise, the Worksite Liaison will consult with the worksite and coordinate with the participant's Career Coach to provide feedback to the participant.

Work Experience and Paid Work Opportunities Hours

Throughout the duration of the WEX or PWO, the Worksite Liaison is responsible for monitoring and supporting timesheet submission to ensure on-time payment of wages. If a participant fails to submit a timesheet, the Worksite Liaison will coordinate with the participant, worksite supervisor and/or the Employer of Record to ensure the participant is compensated according to the requisite [state](#) and [federal](#) laws.

Participants failing to submit accurate, or on-time timesheets are in violation of their *Work Experience Training Agreement* and risk having their WEX or PWO terminated. Worksites failing to verify participant hours worked in a timely manner are in violation of their *Worksite Agreement* and risk having their program participation terminated.

Ending Work Experiences and Paid Work Opportunities

Worksite Liaisons must track aggregate hours worked for each WEX and PWO service and notify participant and worksite Supervisor when 60 hours remain to prevent participant from working more hours than originally approved. Wages in excess of authorized hours may lead to disallowed costs.

The Worksite Liaison must notify the Employer of Record regarding any WEX or PWO completion:

- When a WEX or PWO end date is planned, a minimum of 24 hours' advance notice is required.
- When a WEX or PWO end date is unplanned, notice must be provided to the Employer of Record within 24 hours of the participant giving notice.

For all WEX services and PWO services copied to Career Boost, the Worksite Liaison will also administer and collect a *Work Experience Evaluation* from employers within 10 business days of WEX completion and provide a copy to the Career Coach. *Work Experience Evaluations* are required for participants who complete 50% or more of their planned hours.

Regional Program Standards

Topic: PDX Metro Works

Date: October 1, 2025
Page 10 of 22

Worksite Liaisons must enter a Case Note for all Work Experience Statuses of:

- Completed - Not Hired and hours are less than 80% of planned hours
- Not Completed - Quit
- Not Completed - Fired
- Transferred

Work Experience and Paid Work Opportunities Transfers

A WEX or PWO transfer occurs when a participant must be moved from one worksite to a different worksite or position during the course of their original assignment. This is a rare occurrence, but typically happens when:

- A worksite is unable to continue hosting a WEX or PWO placement.
- The worksite requests/recommends the participant be assigned to a different position within their worksite.
- The participant expressed concerns regarding the WEX or PWO placement, which have been discussed with the worksite and Career Coach without resolution.

The Worksite Liaison must enter a Case Note explanation for any Work Experience Transfer.

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 Service Provider for appropriate referrals to such services as SNAP, 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 PDX Metro Works program services.

Support services are considered payments and do not extend program participation; therefore, every support service should be delivered with an appropriate staff service on the same day (e.g., Career Coaching, WEX, PWO).

Prerequisites

Participants who seek Support Services must complete enrollment in the PDX Metro Works program and the qualifying grant funding the Support Service. Please note that additional prerequisites may be required by the grant funding the Support Service, such as documentation of need. Refer to the grant specific *Regional Program Standards* for details.

Regional Program Standards

Topic: PDX Metro Works

Date: October 1, 2025

Page 11 of 22

Administrative Requirements

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 Services Definitions

PDX Metro Works Service Providers may provide the following types of Support Services. If the Support Service 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: Service Provider Contracts may have a variety of funding sources. It is important to check and ensure that the support expenses being covered are allowable to the selected funding source.

Regional Program Standards

Topic: PDX Metro Works

Date: October 1, 2025

Page 12 of 22

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

Clothing/Personal Care

Clothing and/or related footwear or incidentals for interview (including grooming and hygiene products), 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.

Employment Documentation

Payment of fees required to replace documentation required to complete an I-9 with an employer to secure employment after enrollment in the PDX Metro Works program.

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.

Professional Test/License/Organization Fees

When membership, professional event registration and/or licenses/certifications/test/test preparation fees are required or necessary to ensure a participant is prepared for employment or provides increased access to employment opportunities in the associated sector. Support may include the cost for professional licenses (including a state-issued driver's license when required for the job); 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).

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., desk computers, 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:

Regional Program Standards

Topic: PDX Metro Works

Date: October 1, 2025

Page 13 of 22

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 than 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/>)

Regional Program Standards

Topic: PDX Metro Works

Date: October 1, 2025

Page 14 of 22

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.

Regional Program Standards

Topic: PDX Metro Works

Date: October 1, 2025

Page 15 of 22

- 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.

Stipend Payments

A Stipend is a payment made to participants to help cover time spent while they engage in Worksystems approved PDX Metro Works services. Every stipend awarded must have a clear connection to a PDX Metro Works I-Trac service. There must be clear goals and expectations set forth as to what the participant must do to earn a stipend.

Administrative Rules

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

- Service providers must follow business processes and procedures established by Worksystems for Stipend-allowable activities and related Stipend amounts.
- To award Stipends, Service Providers must follow the Stipend policy set by Worksystems that defines how Stipends will be considered and awarded. Individual award payments will be reviewed and monitored against the Worksystems' provided policy and procedures.
- Each Stipend payment must include a record of the participant's engagement such as confirmation from the Training provider of attendance, a certificate of Training completion or Credential.
- Stipend payments are to be paid by check payable to the participant, direct deposit into an account in the participant's name or via pay card through a payment system where a specific pay card is assigned to a participant. Gift cards, gift certificates or retail vouchers cannot be used as Stipend payment.

Regional Program Standards

Topic: PDX Metro Works**Date: October 1, 2025****Page 16 of 22**

- Participants are required to sign an acknowledgment of receipt of the Stipend. Check endorsement, direct deposit or pay card signature may be used as the signed receipt.
 - Where pay cards are distributed through the Payor of Record, the signature is to be captured at the point the pay card is given to the participant by the Youth Coaching Contractor, with the number/card ID noted. Electronic signatures are allowed utilizing tools such as DocuSign and Adobe Sign. Further Stipend payments to the pay card do not require additional signature as it's treated as a direct deposit.
 - Where pay cards are distributed through the Employer of Record, the Employer of Record shall follow their fiscal policy for card distribution.
- Any participant receiving a stipend must complete the required tax reporting documents including but not limited to W-4 or W-9 as applicable. Participants receiving more than \$599 in payments in one calendar year will be issued a 1099 or W-2 for tax reporting purposes.
- Stipend payments must be paid from funds during the program year in which the program engagement occurred.

Incentive

An Incentive is a financially based reward to a participant for successful achievement of service goals and may be structured into certain PDX Metro Works projects approved by Worksystems. Incentives are currently available to participants in Paid Work Opportunity programs upon meeting required goals.

To award an Incentive, an addendum to *the Work Experience Training Agreement* or Stipend form must be completed, outlining the project name that allows for the Incentive, the requirements for the Incentive to be paid and the approved amount.

Note: Incentives may not be paid with WIOA Adult or Dislocated Worker funding. The availability of an Incentive in a PDX Metro Works project must be approved by the funder in writing and maintained in the Worksystems grant fiscal file.

Incentives are paid through the Employer of Record; verification of the required hours is to be done through that system. Any participant receiving an Incentive must complete the required tax reporting documents including but not limited to W-4 or W-9 as applicable. Participants receiving more than \$599 in payments in one calendar year will be issued a 1099 or W-2 for tax reporting purposes.

Regional Program Standards

Topic: PDX Metro Works

Date: October 1, 2025

Page 17 of 22

Performance

Work Experience Performance

Additional goals may be established in Contract Statements of Work for a minimum number of participants enrolled, businesses served and businesses identifying as BIPOC and/or women-owned.

Performance Measure Definition	Performance Measure Calculation
Placed in WEX or PWO Of all participants enrolled in PDX Metro Works, the number that begin a WEX or PWO.	All participants with a WEX or PWO service with a status of Started.
Successfully Completed WEX or PWO Of all participants placed in a WEX or PWO, the percent that end with a status of Completed.	Denominator All participants that have WEX or PWO service with an end date. Numerator Participants that have WEX or PWO service with a status of Completed-Hired or Completed-Not Hired.
Supervisor Evaluation Rate (All WEX services and PWO services copied to Career Boost) For the total number Completed placements, the percent returning a completed Work Experience Evaluation.	Denominator All WEX services with a status of Completed-Hired, Completed-Not Hired, Not Completed-Quit or Not Completed-Fired where 50% or more of planned hours were completed. Excludes all participants with an I-Trac Work Based Learning service with an Evaluation Control with a status of "Not applicable to service type." Numerator WEX services where the Evaluation Control = Yes or No in the Work Based Training record in I-Trac.
Participants Hired at Worksite (where applicable) Of all participants placed in a PWO, the percent that are hired at the worksite at the end of their PWO.	Denominator All participants that have a PWO service with an end date. Numerator Participants that have a status of Completed-Hired.

Regional Program Standards

Topic: PDX Metro Works

Date: October 1, 2025
Page 18 of 22

Data Points

New Worksites Developed

The number of new Worksite Agreements developed (excludes renewal of expiring Worksite Agreements).

All Active Worksites

The number of unique worksites actively engaged in PDX Metro Works services with current placements or open WEX positions.

New Positions Developed

The number of new position descriptions developed and posted in the WEX Bank for placement.

All Active Positions

The total number of position descriptions posted in the WEX Bank regardless of status.

Additional Performance and Data Guidance

Case Notes

All data entered in the I-Trac system is defined as a case note. Narrative case notes entered into the system should not repeat information already entered into the participant's I-Trac record, but expand upon, provide context to or augment service or employment data, such as noting successes, challenges and progress on WEX and PWO assignments, or documenting why an assignment ended early. Narrative case notes should not include any medical or treatment information, or personal information that is not relevant to their career plan activities.

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. For participants with services copied to Career Boost, reference Career Boost *Regional Program Standards* for additional data entry requirements.

Enrolled Participant

An applicant with a Participation Date in I-Trac.

Exit

The Exit date is the date of the last in-program service entered in I-Trac.

Auto-Exit

When a participant has gone more than 90 days without PDX Metro Works services they will be automatically exited. The Exit date is the last date of the PDX Metro Works service entered in I-Trac.

Global Exclusions for Performance

Participants who find themselves in certain types of circumstances beyond their control and that preclude them from continuing participation in the program 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.

Regional Program Standards

Topic: PDX Metro Works

Date: October 1, 2025

Page 19 of 22

- **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. 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.

Placement

A placement is a participant with a Work Based Training service Start date in I-Trac (excludes *Planned* status).

Work Experience Service Statuses

A service status is entered in the WEX or PWO service in I-Trac under the following conditions:

- **Completed – Hired:** This status is utilized when a participant has started and completed a WEX or PWO and was hired by the worksite. This status is utilized for WEXs and PWOs only when the participant has completed 80 percent of their planned WEX hours. A WEX or PWO may also be defined as Completed-Hired without reaching the 80 percent rate if the participant transitions to unsubsidized employment at their worksite.
- **Completed – Not Hired:** This status is utilized when a participant has started and completed a WEX or PWO and the participant was not hired by the worksite. This status is utilized for a WEXs or PWOs only when the participant has completed 80 percent of their planned hours. A WEX or PWO may also be defined as Completed without reaching the 80 percent rate if the participant:
 - Transitions to unsubsidized employment.
 - Transitions to a secondary, post-secondary or occupational skills training program.
 - Has an identified medical necessity that precludes them from participating in the WEX or PWO.
- **Not Completed – Fired:** This status is utilized when a participant has started a WEX or PWO, but during the service, the participant was terminated from their placement.
- **Not Completed – Quit:** This status is utilized when a participant has started a WEX or PWO, but during the service the participant voluntarily ended their participation without completing 80 percent of their planned hours.

Regional Program Standards

Topic: PDX Metro Works

Date: October 1, 2025
Page 20 of 22

Documentation Requirements

I-Trac Data Entry

Refer to the PDX Metro Works I-Trac Data Entry Guide located on the [Knowledge Base](#).

File Documentation Requirements

Participant file documentation may be paper located in a physical file (to be kept in a secure [locked] file location); may be kept in a secure electronic file (secure means limited access/access requiring system permissions and is not in a folder accessible by all staff and with no security built in); or maintained in I-Trac.

Worksite Development File Documentation

The following standard forms will be used and are provided as Word document forms by Worksystems. Unless the service is being copied to Career Boost, participants in Paid Work Opportunities are exempt from requirements noted with an asterisk ("*").

Requirement	Detail	Location
Worksite Verification Checklist	Used to ensure that all aspects of the program have been reviewed with the worksite, including compliance with BOLI and workplace safety assurances. Must be completed prior to a participant's placement in a WEX or PWO service.	Worksite Development File
Worksite Agreement	<p>Signed by the worksite company/organization and the worksite development contractor representative. These agreements are non-financial and outline the requirements and program responsibilities of the various parties involved in the WEX or PWO (worksite, worksite development contractor, employer of record).</p> <p>A single <i>Worksite Agreement</i> may be signed by a company/organization with multiple worksite locations.</p> <p>Must be completed prior to a participant's placement in a WEX or PWO service.</p>	Worksite Development File
Participant Acknowledgement to Begin Work	All WEX and PWO participants must review and sign this form before a WEX or PWO can begin.	Participant File or I-Trac Document Upload - Application (Signed Program Application)

Regional Program Standards

Topic: PDX Metro Works

Date: October 1, 2025
Page 21 of 22

Requirement	Detail	Location
Work Experience Training Agreement	<p>Participant training agreement outlining the details concerning the tasks the participant is expected to complete and learning goals for the WEX or PWO. It also details the work schedule and contact information.</p> <p>Must be completed prior to a participant's placement in a WEX or PWO service.</p>	<p>Participant File or I-Trac Document Upload – Training Agreement</p>
Work Experience Evaluation*	<p>This is the tool for a worksite to provide an assessment to the participant regarding their demonstration of necessary workplace skills, including soft skills, needed for success in any work environment. The worksite liaison is responsible for collecting the <i>Work Experience Evaluation</i> from the worksite. The career coach is responsible for reviewing the evaluation with the participant.</p> <p>The Worksite Supervisor Evaluation must be sent to the Career Coach within 10 business days of the completion of the WEX.</p>	Worksite Development File
Stipend Documentation	For eligible PWO, stipend payment must include a record of the participant's engagement such as confirmation from the training provider of attendance, a certificate of training completion or Credential.	<p>Participant File or I-Trac Document Upload - Training Provider Evaluation/Progress Report</p>
Incentive Documentation	For eligible PWO, incentive payments must include a record of the participant's completion of the incentive requirements.	<p>Participant File or I-Trac Document Upload – Training Agreement</p>

Regional Program Standards

Topic: PDX Metro Works

Date: October 1, 2025

Page 22 of 22

The following required documents are created by the Worksite Development Contractor and must include the elements outlined in the Detail section.

Requirement	Detail	Location
Position Description	Must minimally include but is not limited to: Worksite name and address, worksite supervisor name and contact information, desired skills, type of work, any other requirements and schedule. Must be completed prior to a participant's placement in a WEX or PWO service.	Worksite Development File

Required when PDX Metro Works staff completes eligibility determination and enrollment for the participant into the program or grant used to fund the WEX or PWO.

Requirement	Detail	Location
Program Application	A completed and signed Program Application is required. 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

Required when a WEX or PWO service is copied to Career Boost.

Requirement	Detail	Location
ODHS Hour Pre-Verification Documentation	Email documentation verifying the number of hours a participant can complete in their WEX or PWO. This verification must be received before a participant begins their planned WEX or PWO.	Participant File
SNAP E&T Subsidized Employment Placement Approval Form	This form is completed by PDX Metro Works staff and submitted to ODHS <i>prior to the placement start date</i> with all required attachments.	Participant File