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Portland Metro

Regional Program Standards

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

Topic: Workforce Benefits Navigator

Date: October 1, 2025	☐ New	☒ Revised	

Workforce Benefits Navigators deliver outreach, engagement and referral services to workforce programs for priority populations in Multnomah and Washington Counties toward industry-specific Training and employment opportunities in Worksystems' five target sectors: Clean Energy, Construction, Early Childhood Education, Healthcare and Manufacturing. The Workforce Benefits Navigator program is part of Future Ready Oregon, administered through the Higher Education Coordinating Commission (HECC). Future Ready Oregon funding is focused on serving the following priority populations:

- Low Income households
- Women
- People of Color
- People with justice system involvement
- People experiencing disabilities
- LGTBQIA+
- Veterans
- Oregon tribal members
- Individuals living in Rural and Frontier communities
- People experiencing age discrimination (youth and older workers)

Contents

Eligibility

Service Providers must establish processes that prepare potential participants (applicants) to complete the eligibility and enrollment requirements for the Workforce Benefits Navigator program as outlined within these *Regional Program Standards*. To participate in the Workforce Benefits Navigator program an applicant must be:

- Aged 16 years or older.
- Priority is to be given to residents of the state of Oregon.

Eligibility Documentation

Enter all data into the Registration Tab in the I-Trac enrollment record and determine eligibility in the Registration Results. Documentation of Eligibility requirements is applicant attestation obtained through their signature on the I-Trac program Application.

Participant Enrollment

Required Disclosures

Provide and discuss the social security number (SSN) disclosure and the grievance and equal opportunity rights disclosure to ensure the applicant understands their rights. The applicant will acknowledge receipt of these disclosures when they sign the I-Trac program Application. No copies of the forms need to 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 WSPM services and chooses not to disclose their number. Applicants must be provided the SSN Disclosure (Standard SSN April 2025) that describes how their SSN will be used and the program's commitment to confidentiality. Where the Applicant agrees to the use of their SSN for reporting purposes, the indication is noted through I-Trac on the WSPM Application for services and the consent is the Applicants' signature on the Application.

Equal Opportunity (EO)/Grievance Disclosure

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

Enrolled Participant

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

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

The applicant must begin participation in program services within 45 days of the Registration date. Participation begins with the first grant funded service entered in I-Trac.

Service Definitions

Career Coaching

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

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

- Assist in identifying career and education goals.
- With the participant, develop a plan that incorporates a customized set of program services and outside resources that will assist them in meeting their goals.
- Coach participants in the personal and interpersonal ("soft" or "life") skills required to obtain and retain employment.
- Assist participants in identifying and securing the resources and support necessary to succeed in their training and career plans.
- Facilitate collaboration between the different Service Providers working with the participant to synchronize career and education goals and align resources.
- Coach participants in job search including resume review, interview coaching, and career advising.
- Provide regular check-ins to track participant progress and ensure participants retain employment, including assistance in career advancement planning, resource planning, and re-placement in employment.
- Provide and/or offer connections to employment, childcare and/or housing services which are culturally specific and/or culturally responsive, based on participants' needs.
- Management of the tracking, documentation and reporting requirements of program participation and performance.

Career and Resource Planning

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 Mapping Workshop

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

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.

Referral to Training Program

Participant is referred to and/or assisted in applying for a Training program.

Referral to Employment

Participant is referred to and/or assisted in applying for employment.

Referral to a APN (Aligned Partner Network) Provider

Participant is provided a referral/warm hand-off to an APN provider.

Referral to WorkSource

Participant is provided with a referral/warm hand-off to a WorkSource Portland Metro Center staff for services.

Referral to Support Services

Support Services are categorized into the following six types:

- Referral to Support Services – Childcare: Participant is referred to a resource(s) that will assist with financial support for childcare services.
- Referral to Support Services – Food Assistance: Participant is referred to a resource(s) that will assist with the participant’s food insecurity needs.
- Referral to Support Services – Residential Assistance: Participant is referred to a resource(s) that will assist with financial support for rent.
- Referral to Support Services – Tools, supplies, equipment, uniforms, technology: Participant is referred to a resource(s) that will assist with financial support for tools, supplies, equipment, uniforms, or technology required to attend/complete training, or to obtain/maintain employment.

- Referral to Support Services – Transportation: Participant is referred to a resource(s) that will assist with financial support for transportation needs required to engage in Training and/or employment.
- Referral to Support Services – Other: Participant is referred to a resource(s) that will assist with financial support for any other allowable support service need(s) listed below in the Support Services section of these Regional Program Standards.

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 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 Workforce Benefits Navigator program services.

Support Services are considered payments and do not extend program participation; therefore, every Support Service must be delivered with an appropriate staff service on the same day.

Prerequisites

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

- Enrolled in the Workforce Benefits Navigator 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 may be completed through the following methods:

- Completion of a Prosperity Planner budget

  OR

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

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

Administrative Requirements

Documentation

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

> ***Note**:* Direct deposit into an account in the participant's name and the endorsement on a cancelled check are both allowable documentation of this requirement. Direct deposit information must be received directly from the participant with approval to deposit Support Service payments 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 Contractor 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 signature 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 Contractor must establish and follow a process for reconciling pre-purchased Support Services (e.g., bus passes, pre-paid gas cards, gift cards). This reconciliation must occur at least quarterly (monthly preferred), with the documentation maintained on-site and made available during Worksystems or funder monitoring, as requested.

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

Support Service Definitions

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

Drivers Education Training

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

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

Employment Documentation

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

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

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 WBN 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.

Housing Assistance

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

Where community resources are available and the participant eligible, those resources must be used before Support Service payments can be utilized.

Housing Payment

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

> ***Note***: WIOA funds may not be used to pay past-due rent or mortgage payment.

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

Housing Stability Education

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

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

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

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

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

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

Legal Services
When necessary to assist a participant in expunging a criminal record or to maintain work authorization 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.

Addendum A – Low Income Guidelines (LLSIL)

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.

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

Excludable Income	
Income Type	**Income Type Description**
Assets	Any assets drawn down as withdraws from a bank, the sale of property, a house, or a car
Capital gains	A profit from the sale of property or of an investment.
Educational Assistance	Educational financial assistance under Title IV of the Higher Education Act, Pell, Grants, Federal Supplemental Educational Opportunity Grants, Federal Work Study, Stafford, and Perkins loans
Fringe Benefits	Non-cash benefits such as: employer paid fringe benefits, food or housing received in lieu of wages, Medicare, Medicaid, food Stamps, school meals and housing assistance
Foster Care	Foster childcare payments
Military	Any amounts received as military pay or allowance by any person who served on active duty
Other Payments	Tax refunds, gifts, loans, lump-sum inheritances, one-time insurance payments or compensation for injury
Scholarship	Needs-based scholarship assistance, State, and private grant aid

Excludable Income	
Income Type	**Income Type Description**
Social Security (SSI)	Supplemental Security Income (SSI)
Tribal	Income derived by a member of an Indian tribe from fishing rights-related activity of the tribe, payments made to Indians under PL 98-64 ("An Act to provide those per capita payments to Indians may be by tribal governments, and for other purposes.")
Veterans	Pay or allowances previously received by any veteran (whether an Applicant or a member of the Applicant's family) while serving on active duty in the United States Armed Forces, payments received by a veteran for participation in National Guard service/activities, educational assistance and compensation to veterans and other eligible persons under Title 38
Vocational Rehab	Payments made to a client (except for OJT payments)
Welfare Payments	TANF, Emergency Assistance (EA), non-federally funded General Assistance (GA) and Refuge Cash Assistance (RCA)
WIOA	One Stop partners programs where income is subsidized. (e.g., work experiences, support services)

Performance

Performance Measure	Calculation Methodology	Reporting Cohort	I-Trac Data Entry
Engaged Participant	Unique number of individuals with a Workforce Benefits Navigator I-Trac record with an Application Date	Quarter of the Application Date	I-Trac record with an Application Date
Enrolled Participant	Unique number of individuals with a Workforce Benefits Navigator I-Trac record who has received at least one Workforce Benefits Navigator funded service to set the Participation Date.	Quarter of the Participation Date	I-Trac record with a Participation Date (at least one service entry)
Number of Participants referred to Training and/or employment opportunities	Unique number of participants with a *Referral to Training Program, Referral to WorkSource,* or *Referral to Employment* service	Quarter of the first referral service start date	Services Tab – *Referral to Training Program, Referral to WorkSource,* or *Referral to Employment* service
Number of participants who begin a Training or Work Experience service	Unique number of participants who begin a Training or Work Experience service	Quarter of first Education & Training Placement Control record with a status of “Started”	Outcomes Tab – Education & Training Placement Control – Placement with a status of “Started”
Number of participants who complete a Training or Work Experience service	Unique number of participants who complete a Training or Work Experience service	Quarter of first Education & Training Placement Control record with a status of “Completed”	Outcomes Tab – Education & Training Placement Control – Placement with a status of “Completed”
Number of Participants who obtain employment	Unique number of participants who obtain unsubsidized employment	Quarter of first Employment Confirmation date	Outcomes Tab – Employment Confirmation Control with a confirmation type of “After Participation Employment Confirmation”

Additional Performance and Data Guidance

Case Notes

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

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 service activity, payment, or receipt of employment information.

Placement Data Entry and Confirmations

Employment Data Entry

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

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

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

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

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

Contractor staff are responsible for accurate accounting of earnings, hours and benefits information that informs performance measures.

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 confirmation.

Exit

Manually enter an Exit upon completion of program services. The Exit date is the date of the last service entered in I-Trac.

Procedures for Quarterly Reporting

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

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

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

Quality Job Standards

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

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

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

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

- Help job seekers understand what makes a quality job—beyond just wages— and how to job search using the quality jobs framework.
- Help participants evaluate employment opportunities in Worksystems' targeted sectors and develop individualized plans that align with their unique career and education goals and circumstances.

- Help participants recognize when a job only meets some - or none - of the quality job characteristics, while explaining when a role is a useful first step toward a quality job.

- Identify and/or develop training and work experience opportunities that help participants develop essential skills as indicated by industry partners, including adaptability, communication, collaboration, analysis/solution mindset and self-awareness.

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

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

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

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

Other Quality Job Indicators

- Labor Representation - Unionized jobs typically offer higher wages, better benefits, and stronger worker voice.
- B Corp Certification - Third-party verified companies meet high standards for worker well-being, transparency, and accountability.
- Benefit Corporation - Legally commit to purpose, accountability, and transparency—often a step toward B Corp certification.

- Employee Stock Option Program (ESOPS) - Employee-owned participants have larger retirement account balances than comparable workers nationwide and have better job security.
- Partners in Diversity - Employers aligned with this network show a commitment to equitable hiring.
- Apprenticeships – Employers who participate in Registered Apprenticeships Provide structured, paid training and career progression for job seekers.