

SOUTH CENTRAL OKLAHOMA WORKFORCE BOARD, INC.

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SUBJECT: WIOA YOUTH POLICY

PURPOSE:

To provide staff with guidance on the changes to expenditure requirements, eligibility and program elements under WIOA to the Title I Youth Program. This policy defines the criteria for the design and parameters of the Title I Youth Program with emphasis on priority of service to out of school youth.

It shall be the policy of the South Central Workforce Board (SCOWB) and the Board of Directors of the Local Elected Officials (LEO) that all Workforce Innovation and Opportunity Act services shall be delivered in a manner that fully complies with the WIOA law and regulations.

AUTHORITY:

- Workforce Innovation and Opportunity Act (Public Law 113-128), Sections 116 and 129
- WIOA Regulations at 20 CFR part 681
- TEGL 23-14,
- Oklahoma Workforce Development Issuance # 02-2016
- TEGL 10-16, Change 1
- TEGL 19-16
- TEGL 21-16
- TEGL 2-16
- TEGL 23-14
- TEGL 38-14
- TEGL 8-15
- OWDI #04-2017 HHS Poverty Guidelines (To be updated on a yearly basis)
- Oklahoma Workforce Development Issuance #02-2016 Change 2
- OWDI #21-2017 Data Validation and Supporting Documentation Policy

MESSAGE: This South Central Workforce Board (SCOWB) Title I Youth Policy is intended to align with Oklahoma Workforce Development Title I Youth Program Guidance, Change 2 and is intended to clarify procedures that minimize the burden of documenting eligibility, service provision, and outcomes while remaining respectful of the need to ensure data integrity and report accurate information. All documentation previously copied and kept in paper case files must now be electronically scanned and uploaded to participant records to develop a virtual case file.

BACKGROUND:

On July 22, 2014, the President signed WIOA into law. WIOA supersedes the Workforce Investment Act of 1998. Under WIOA, Federal, State, and local partnerships that put the youths' interests first will help the nation's disconnected youth to succeed. The common performance measures across

WIOA core programs, adult and youth programs under WIOA title I, and Adult Education and Vocational Rehabilitation programs under WIOA titles II and IV provide a mechanism to support youth service alignment. WIOA envisions the Department's youth programs, including Job Corps, Youth Build, and the youth formula-funded program, coordinating to support systems alignment and service delivery for youth. Local and State plans will articulate this vision of youth workforce development activities and help ensure a long-term supply of skilled workers and leaders in local communities.

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POLICY: WIOA outlines a broad youth vision that supports an integrated service delivery system that leverages resources to support in-school youth (ISY) and out-of-school (OSY) with the primary focus on OSY. The WIOA Youth Program is targeted at young people between the ages of 16-24 to assist them in career guidance/exploration and educational attainment. Under WIOA, youth will be determined as either an Out-of-School Youth (OSY) or an In-School Youth (ISY) at the time eligibility is determined and will remain as such throughout their enrollment. There is also an increased focus on work experience and an increase in the number of program elements bringing the total number of program elements to 14. WIOA funding allows the delivery of services that prepare youth for post-secondary educational and employment opportunities, attainment of educational and/or skills training credentials, and obtainment of employment with career opportunities. To accomplish this, each youth must be assessed to determine skills, interests, needs, and personal goals in order to create an Individual Service Strategy (ISS). This is accomplished in collaboration with the youth to expand the youth's connections to and understanding of coordinated around 14 youth elements which must be made available to every youth participant. Programs may leverage partner resources to provide program elements as long as the activity is closely connected and coordinated with the WIOA youth program to ensure the activity is of high quality and beneficial to the youth participant Client and Talent Development Specialist (TDS)/Case Manager must sign and date Individual Service Strategy (ISS) Client Involvement Statement. Document must be uploaded to Oklahoma Service Link.

In order to maximize resources, the service provider must ensure that each youth participant can complete his/her activities, services within 5 years of his/her date of registration with exception of extension based on participants needs and approved by the Service Provider Director in coordination with Board.

Funding Requirements and Priorities

WIOA shifts the primary focus of the Title I youth formula program to support the educational and career success of out-of-school youth (OSY) with an expectation that the shift in focus will result in a reconnection of out-of-school youth such as high school dropouts to education and jobs. The OSY focus is evident in the requirement that a **minimum** of 75 percent (75%) of WIOA youth funds be spent on OSY.

Additionally, under WIOA, opportunities for work experience are an important element of the program. A minimum of 20% of youth formula funds must be spent on work experience activities that include an academic and an occupational education component. Work experience activities may include paid and unpaid work experience, summer employment opportunities, job shadowing, on-the-job training, internships and pre-apprenticeships. The 20% may include all expenses related to the work based programs including staffing and curriculum development and should be calculated after subtracting the funds spent on administrative costs. Funds spent on work experience must be tracked and reported on a monthly basis to the Oklahoma Office of Workforce Development.

WIOA Youth Program Eligibility, Program Enrollment & Data Validation

Program enrollment is the point at which information used in performance begins to be collected. All applicable demographic information pertaining to a youth program participant must be accurately entered in the virtual case management system's Universal Demographics Screen. The demographic information entered will generate a potential eligibility and allow enrollment into the appropriate program. When the enrollment is complete a snapshot of the information that was entered in the universal demographics screen will exist in the program enrollment. The characteristics in the snapshot will remain unchanged throughout program participation. These characteristics will be verified by the participant's virtual self-attestation just prior to staff entering the program enrollment. Only the characteristics used to qualify the youth as eligible for a WIOA program enrollment will require appropriate documentation be uploaded into the participant's virtual case file.

The WIOA Youth Eligibility Form," **Attachment B**, must be filled out completely indicating what criteria and source documents are being used to verify eligibility. The form and the applicable source documents must be uploaded into each participant's virtual case file at the time of the program enrollment.

In addition to documentation supporting program eligibility all youth must provide documentation of:

- Age/Date of Birth;
- Selective Service Registration (if applicable); and
- Eligibility to Work in the United States.

1. Eligibility Requirements

- 1. A citizen of the United States or an eligible non-citizen whose status permits them to be employed in the United States.**

Eligible non-citizens are required to show a current "Resident Alien Card" issued by the Department of Justice, Immigration and Naturalization Service (INS), or they have certification from INS that they are eligible to work. Such certification may be in the form of a card, a letter, or a notation in the alien's current passport.

Documentation sources include Birth Certificate, a DD-214 if it shows place of birth, Baptismal Certificate, a Hospital Record of Birth, INS documents, Native American Tribal Document which documents U.S. Citizenship, Food Stamp Records, Public Assistance Records, collateral contact with INS, etc.

2. Selective Service Registrant as Required, Age 18 to 25.

To document registration with the Selective Service System, acceptable sources are a Selective Service Registration Certificate or an SSS Letter of Registration. For applicants who are unable to provide a document, staff should call the Selective Service System's telephone number or verify on the SSS website. If a youth turns 18 while on the program, the staff must assist them in registering.

3. Not less than 14 years of age and not more than 21 years old for In-School Youth and not less than 16 years of age and not more than 24 for the Out-of-School Youth.

Acceptable documentation sources include Birth Certificate, Driver's License, School ID Card, School Record, Tribal Record, Work Permit, Passport, Military ID, UI document or other government agency referral form or document, or other Federal, State, or Local Government-Issued ID.

Two new definitions of low income for youth:

A youth living in a high-poverty area and a youth (ISY only) who receives or is eligible to receive a free or reduced-price lunch under the Richard B. Russell National School Lunch Act are considered low-income under WIOA. When a school does not use individual eligibility criteria to determine who is eligible for free or reduced-price lunch, entire school receipt of free or reduced price lunch must not be used to determine WIOA low-income status for ISY.

Income when determining a youth's low-income status:

The definition of what counts as income when determining a youth's low-income status has changed under WIOA. Under WIOA, there is no exclusion of payments for unemployment compensation, child support payments, and old-age survivor's insurance benefits from the income calculations for determining if an individual is low-income. These exclusions that were previously provided under WIA sec. 101(25) no longer apply.

Circumstances where only the youth's income is considered:

For ISY with a disability, the youth's own income, rather his or her family's income, must meet the low-income definition and not exceed the higher of the poverty line or 70 percent of the LLSIL.

Additionally, if an individual is not living in a single residence with other family members; that individual is not a member of a family for the purpose of WIOA income calculations. 20 CFR § 675.300 defines family as "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

Exception for youth with disabilities:

There is one exception to age eligibility for youth attending school. Youth with a disability who have an Individualized Education Program (IEP) may be enrolled as ISY after the age of 21. This allows youth with disabilities to be served by the K-12 public school system beyond the age of 21. Such youth may only be enrolled as ISY up to the age allowed by *Oklahoma Law Section 168. Student of Legal Age- Completion of Twelfth Grade* to receive secondary education services.

In-School-Youth Eligibility

In-School-Youth (ISY) must be attending school, **as defined under State law, Oklahoma Code, Title 70-1-106), including secondary and postsecondary school**; not younger than 14 or **(unless an individual with a disability who is attending school under Oklahoma State Department of Education School Law Book Section 168. Students of Legal Age or Oklahoma Code, Title 70-5-132)**, older than 21 **at time of enrollment**. Note: Youth who are home schooled or virtual learners are ISY. Youth eligible to be served as ISY must be **low income*** and fall into one or more of the following categories:

1. Basic skills deficient
2. An English language learner
3. An offender (juvenile who is or has been subject to any stage of the criminal justice process)
4. A homeless youth or a runaway youth
5. In foster care or has aged out of foster care
6. Pregnant or parenting
7. Individual with a disability
8. An individual who requires additional assistance to complete an educational program or to secure and hold employment is an individual who is **low income*** and meets at least one of the following criteria:
 - With a parent or legal guardian that is currently or previously incarcerated for a felony conviction
 - With a parent or legal guardian who lacks a high school diploma or GED
 - Who attends or has attended chronically under performing schools listed as a priority or targeted intervention school on the State Department of Education website <http://www.ok.gov/sde/priority-schools>
- Low Income Youth between 18-21 years of age with a pattern of Poor Work History. Poor Work History includes non-reoccurring employment income, sporadic employment. SCOWB defines poor work history as the participant has been fired from 1 or more jobs within the last six months, or has a history of sporadic employment, such as “has held 2 or more jobs within the last 12 months, and is no longer employed”, has actively been seeking employment for at least 3 months, but remains unemployed or underemployed. This includes a youth with no employment history, with limited work experience, and/or actively seeking full-time employment, but have only achieved part-time employment.

Because age eligibility is based on age at enrollment, in-school youth participants may continue to receive services beyond the age of 21 once they are enrolled in the program as long as he or she is receiving at least one program element other than follow-up services. However, it may be appropriate

to also enroll the youth in the adult worker program to maximize program resources designed to meet the needs of the individual.

High Poverty Area - The Workforce Innovation and Opportunity Act (WIOA) Title I Youth Program contains a provision that allows for youth living in a high poverty area to automatically meet the low-income criterion that is one of the minimum eligibility criteria for all in-school youth, and for two barriers out-of-school youth in the WIOA youth program as referenced above. The WIOA regulations at 20 CFR § 681.260 define high-poverty areas as a Census tract, a set of contiguous Census tracts, an American Indian Reservation, Oklahoma Tribal Statistical Area (as defined by the U.S. Census Bureau), or other tribal land as defined by the Secretary in guidance or county that has a poverty rate of at least 25 percent as set every 5 years using American Community Survey 5-Year data. Instructions on the Census Bureau's American Fact Finder homepage at: <https://factfinder.census.gov/faces/nav/jsf/pages/index.xhtml>

Please Note: Not every area in the Oklahoma Tribal Statistical Area is eligible, just as it is not every Census tract, or county in the country, but rather every Oklahoma Tribal Statistical Area that has a poverty rate of at least 25 percent. The OTSA's poverty rates may or may not have a Native American poverty rate of over 25 percent. Each OTSA poverty rate will have to be determined on an individual, case-by-case basis.

There is a 5% window for non-income eligible youth. 5% percent of the total number of **Youth** served may be non-income eligible as long as they meet other eligibility criteria. There must be uploaded documentation justifying the 5% in Oklahoma Job Match. These must be pre-approved by the South Central Workforce Board prior to enrollment. Limitation of the "requires additional assistance" barrier for ISY: Not more than five percent (5%) of ISY in a given program year can be eligible based on this barrier.

Out of School Youth Eligibility

The WIOA Youth Program puts emphasis on out-of-school youth (OSY) between the ages of 16-24. School status is determined at the time of program enrollment;

- Must be based on the status at the time the eligibility determination portion of program enrollment is made;
- School status remains the same throughout the youth's participation in the WIOA youth program;
- School status is critical as it determines how a youth's expenditure will be reported.

In addition to not attending any school (as defined by state law, Oklahoma Code, Title 70-1-106)

The Department of Labor does not consider the following to be schools:

- Adult Education Under Title II of WIOA;
- YouthBuild;
- Job Corps;
- Dropout Re-Engagement Programs; and
- High School Equivalency Programs.

However, there is one exception. Youth attending high school equivalency (HSE) programs, including those considered to be dropout re-engagement programs, funded by the public K-12 school system that are classified by the school system as still enrolled in school are considered ISY.

Eligibility for the WIOA OSY program requires the youth to fall into one of the following categories:

1. Individual with a disability
2. School dropout
3. A youth who is within the age of compulsory school attendance, but has not attended school for at least the most recent complete school year calendar quarter. School year calendar quarter is based on how a local school district defines its school year quarters. In cases where schools do not use quarters, local programs must use calendar year quarters
4. A high school graduate who is low income* and either an English language learner or basic skills deficient
5. An offender (juvenile who is or has been subject to any stage of the criminal justice process)
6. A homeless youth aged 16 to 24 who meets the criteria defined in sec. 41403(6) of the Violence Against Women Act of 1994 (42 U.S.C. 14043e-2(6)), a homeless child or youth aged 16 to 24 who meets the criteria defined in sec. 725(2) of the McKinney-Vento Homeless Assistance Act (42 U.S.C.11434a(2)) or a runaway youth
7. In foster care or has aged out of foster care system or who has attained 16 years of age and left foster care for kinship guardianship or adoption, a child eligible for assistance under sec. 477 of the Social Security Act (42 U.S.C. 677), or in an out-of-home placement;
8. Pregnant or parenting
9. An individual who requires additional assistance to complete an educational program or to secure and hold employment is an individual who is **low income*** and meets at least one of the following criteria:
 - With a parent or legal guardian that is currently or previously incarcerated for a felony conviction
 - With a parent or legal guardian who lacks a high school diploma or GED
 - Who attends or has attended chronically under performing schools listed as a priority or targeted intervention school on the State Department of Education website <http://www.ok.gov/sde/priority-schools>
 - Low Income Youth between 18-24 years of age with a pattern of Poor Work History, Poor Work History includes non-reoccurring employment income, sporadic employment.

*The low-income requirement applies to the OSY 4th and 9th categories only. The term low-income also includes a youth that lives in a high-poverty area of eligibility and new enrollment completed

The Enrollment Process

In order to meet the basic skills and training needs of youth who do not meet the eligibility requirements of a program or can't be served, the youth provider must ensure that the youth be referred to the appropriate programs to meet the basic skills and training needs of the youth.

NOTE: All demographic characteristics that apply to the client must be correctly and accurately entered into the State case management system (ex. OkJobMatch.com) prior to the program enrollment. Characteristics used to verify program eligibility must be scanned and uploaded to the case management system as outlined in Attachment A of this policy to develop a virtual case file.

The enrollment process begins with the participant self-registering in OKJobMatch. When the self-registration has been completed staff must meet with the participant and review the information completed by the participant and gather additional information needed to determine potential eligibility. Most of the information needed to determine eligibility will be completed and entered into the system by staff, in consultation with the participant, after the self-registration is complete.

When an individual has satisfied all applicable program requirements for the provision of services, including eligibility determination, an objective assessment, development of an individual service strategy, and received one of the 14 WIOA Youth program elements; he or she is considered a participant. Please remember that all youth program elements, except follow-up services, trigger participation following eligibility determination, an objective assessment, and completion of the individual service strategy. For more information on eligibility and documentation requirements, please see OWDI #21-2017 Data Validation and Supporting Documentation Policy.

Pending List:

Oklahoma's virtual case management system OKJobMatch generates enrollments and potential program eligibilities based on demographic information entered by the participant during self-registration and front-line staff during the intake process. Dislocated Worker and Youth enrollments are placed in a pending queue that require supervisory approval/denial once entered into OKJobMatch. Enrollments, source documentation, and eligibility determinations are valid for 30 days to allow the supervisor time to review information and to approve/deny the pending request. Enrollments must be approved/denied by a supervisor after verifying the client's eligibility including uploaded documentation, self-attestation and program notes, before there is any expenditure of funds. At the end of the 30 days if the enrollment is still in the pending queue it is considered ineligible and will require a new enrollment, new source documentation collection, and a new eligibility determination. When denying the enrollment the supervisor must make a note as to why the enrollment has been denied. *In order to avoid unintentional enrollment denials, the pending list must be worked by a supervisor on a weekly basis.*

Information and Referral:

Eligible Youth – Eligible youth are to be provided with information on the full array of appropriate services that are available through the system including Title I, other eligible providers and one stop partners. Referrals to appropriate training, educational programs and services, that have the capacity to serve the participant or applicant either on a sequential or concurrent basis are also to be provided. Specific program elements will be provided through a provider other than the WIOA Title I contracted service provider. In those instances, the services to be provided will occur without cost as they will be provided through a referral system and coordinate strategies that are in place to ensure the needs of the youth are efficiently met. A Youth Element Availability List has been compiled and made available to all WIOA Title I case managers for availability, referral and coordination of youth elements. The case manager is required to provide a copy to each youth participant for reference, selection and referral.

Ineligible Youth – Youth applicants who do not meet the enrollment requirement of the youth program or who cannot be served by the Title I youth program must be referred for further assessment, as necessary, and referred to appropriate training, educational and services programs that have the capacity to serve the individual. WIOA Title I services provider will maintain an ineligible referral log

to be submitted to the SCOWB on a quarterly bases. Log will detail, reason for ineligibility, service requested, and date and organization referred to.

Program Design and Service Delivery

The WIOA youth program places additional emphasis on individual participant needs. Career pathways have been incorporated as part of both the objective assessment and the development of the individual service strategy (ISS). Additionally, the ISS must be directly linked to one or more of the performance measures.

Objective Assessment of the academic levels, skill levels and service needs of each participant for the purpose of identifying appropriate services and career pathways for youth. The assessment must include a review of the following:

1. Basic Skills
2. Occupational Skills
3. Prior Work Experience
4. Employability
5. Interests
6. Aptitudes
7. Supportive service
8. Developmental needs

Assessments must also consider a youth's strengths rather than just focusing on areas that need improvement.

A new assessment is not required if it is determined it is appropriate to use a recent assessment conducted pursuant to another education or training program conducted in the last 6 months. Objective assessments must be documented as outlined in Attachment A. The assessment is the basis for the establishment of the Individual Service Strategy (ISS).

Individual Service Strategy (ISS) must be directly linked to one or more of the performance indicators and identify career pathways that include education and employment, appropriate achievement objectives, and services based on the objective assessment. The ISS is an ongoing strategy jointly developed by the participant and the case manager identifying the participant's educational/ employment goals, the appropriate achievement objectives, and the appropriate combination of services for the youth to successfully achieve their goals. The ISS must be reviewed on a regular basis and updated as needed. The ISS form is included in this policy as Attachment I.

While there is no one example of the perfect Individual Service Strategy (ISS), strong examples include the following components:

- Addresses key goal areas in education, training, employment and personal development
- Includes short and long-term goals
- Ties the goals to the 14 WIOA Youth program elements/services areas
- Includes objectives and action steps
- Includes needed referrals for services and support services
- Includes timelines with start, end and review dates

- Includes appropriate individuals involved
- Addresses potential barriers
- Includes progress updates/status
- Includes youth-staff agreements

The Measurable Skills Gains, Goals and Interests screens will be used to document the components of the ISS. The ISS will be indicated by the date set and tracked by setting a “Goal Type” from the drop down with a status of “Set but Attainment Pending” and entering a “Planned Date of Attainment.” In addition to setting the “Goal Type” case managers must also write detailed information outlining the need for the goal and the plan for successful attainment.

Updates to the ISS goals must be updated as changes occur in the employment, training or needs of the youth change. Prior to the entry of a new ISS goal, any previous goal of the same type must have the status updated as either “Attained” or “Set But Not Attained. Goal updates must occur when the status of the goal is no longer pending and/or a new goal is set.

WIOA legislation includes 14 program elements, including the original WIA 10 elements condensed into 9, and 5 new program elements. All elements must be included in WIOA Youth program design. While these program elements must be made available to all eligible youth participants between the ages of 14-24, not all elements must be funded with WIOA youth funds. Local programs may leverage partner resources to provide program elements as long as the activity is closely connected and coordinated with the WIOA youth program to ensure the activity is of high quality and beneficial to the youth participant. While local youth programs must make all 14 program elements available to WIOA youth participants, local programs have the discretion to determine which elements to provide to a participant based on the participant’s assessment (ISS). The elements consist of:

Program Element 1: Tutoring, study skills training, instruction, and dropout prevention services

Element One includes “tutoring, study skills training, instruction and evidence-based dropout prevention and recovery strategies that lead to completion of the requirements for a secondary school diploma or its recognized equivalent (including a recognized certificate of attendance or similar document for individuals with disabilities) or for a recognized postsecondary credential.

Secondary school dropout prevention strategies include services and activities that keep a young person in-school and engaged in a formal learning and/or training setting. This program focus is on in-school services relating to attainment of a high school diploma.

The element includes:

- tutoring, study skills training, and instruction that lead to a high school diploma;
- secondary school dropout prevention services intended to lead to a high school diploma.

However, this element does not include:

- dropout recovery strategies that lead to completion of high school equivalency. Those are included in program element 2;
- training services leading to a postsecondary credential. Those are included in program element 4.

Program Element 2: Alternative secondary school services or dropout recovery services

Element two includes alternative secondary school services such as basic education skills training, individualized academic instruction, and English as a Second Language training, or those services that assist youth who have struggled in traditional secondary education. Dropout recovery services, such as credit recovery, counseling, and educational plan development, are those that assist youth who have dropped out of school. While the activities within both types of services may overlap, each are provided with the goal of helping youth to re-engage and persist in education that leads to the completion of a recognized high school diploma equivalency.

Program Element 3: Paid and unpaid work experience

Element Three is a planned, structured learning experience that takes place in a workplace for a limited period of time. Work experience may be paid or unpaid, as appropriate. A work experience may take place in the private for-profit sector, the non-profit sector, or the public sector. Labor standards apply in any work experience where an employee/employer relationship, as defined by the Fair Labor Standards Act and State law. Funds provided for work experiences may not be used to directly or indirectly aid in the filling of a job opening that is vacant because the former occupant is on strike, or is being locked out in the course of a labor dispute, or the filling of which is otherwise an issue in a labor dispute involving a work stoppage. Work experiences provide the youth participant with opportunities for career exploration and skill development.

TEGL No. 8-15 provides further discussion of allowable expenditures that may be counted toward the work experience expenditure requirement and articulates that program expenditures on the work experience program element can be more than just wages paid to youth in work experience. Allowable work experience expenditures include the following:

- Wages/stipends paid for participation in a work experience;
- Staff time working to identify and develop a work experience opportunity, including staff time spent working with employers to identify and develop the work experience;
- Staff time working with employers to ensure a successful work experience, including staff time spent managing the work experience;
- Staff time spent evaluating the work experience;
- Participant work experience orientation sessions;
- Employer work experience orientation sessions;
- Classroom training or the required academic education component directly related to the work experience;
- Incentive payments directly tied to the completion of work experience; and
- Employability skills/job readiness training to prepare youth for a work experience.

Supportive services are a separate program element and cannot be counted toward the work experience expenditure requirement even if supportive services assist the youth in participating in the work experience.

This element is a critical component in the youth program, as this is the only element that has a minimum percentage of expenditure requirements. WIOA requires a minimum of 20% of local area youth funds to be expended on work experience. Please note that:

- Local area administrative funds not subject to 20% requirement; and
- Leveraged resources cannot count toward the 20%.

Work experiences must include academic and occupational education:

- The educational component may occur concurrently or sequentially with the work experience;
- The academic and occupational education component may occur inside or outside the work site;
- The work experience employer can provide the academic and occupational component or such components may be provided separately in the classroom or through other means;
- Local areas have the flexibility to decide who provides the education component;
- The academic and occupational education component refers to contextual learning that accompanies a work experience. It includes the information necessary to understand and work in specific industries and/or occupations;
- Local programs have the flexibility to determine the appropriate type of academic and occupational education necessary for a specific work experience.

Categories of work experience. WIOA identifies four categories of work experience:

- Summer employment opportunities and other employment opportunities throughout the year;
- Pre-apprenticeship programs;
- Internships and job shadowing; and
- On-the-job training opportunities.

Please remember that the job shadowing work experience is a temporary, unpaid exposure to the workplace in an occupational area of interest to the participant.

Program Element 4: Occupational Skills Training

Element Four is an organized program of study that provides specific vocational skills that lead to proficiency in performing actual tasks and technical functions required by certain occupational fields at entry, intermediate, or advanced levels. Local areas must select training programs that lead to recognized postsecondary credentials that align with in-demand industry sectors or occupations in the local area.

Such training must:

- be outcome-oriented and focused on an occupational goal specified in the individual service strategy;
- be of sufficient duration to teach the skills needed to meet the occupational goal; and
- lead to the attainment of a recognized postsecondary credential.

The Department of Labor and the State of Oklahoma allow WIOA Individual Training Accounts (ITAs) for OSY, ages 16 to 24, using WIOA youth funds, when appropriate. ITAs allow participants the opportunity to choose the training provider that best meets their needs. To receive funds from an ITA, the training provider must be on the Eligible Training Provider List. However, the Department of Labor prohibits the use of youth program-funded ITAs for ISY. In-School Youth between the ages of 18 and 21 may co-enroll in the WIOA Adult program if the young adult's individual needs, knowledge, skills, and interests align with the WIOA adult program and may receive training services through an ITA funded by the adult program.

The State of Oklahoma allows competitive procurement of ISY occupational skills training. The process is detailed in **Attachment B**. This process is also supported by DOL's National Office.

Program Element 5: Education offered concurrently with workforce preparation and training for a specific occupation

Element Five reflects an integrated education and training model (IET) and describes how workforce preparation activities, basic academic skills, and hands-on occupational skills training are to be taught within the same time frame and connected to training in a specific occupation, occupational cluster, or career pathway.

This program element refers to the concurrent delivery of:

Program Element 2: Alternative Secondary School Services or Dropout Recovery Services;

Program Element 3: Work Experience; and

Program Element 4: Occupational Skills Training.

Element 6: Leadership Development Opportunities

Element Six includes opportunities that encourage responsibility, confidence, employability, self-determination, and other positive social behaviors such as:

- Exposure to postsecondary educational possibilities;
- Community and service learning projects;
- Peer-centered activities, including peer mentoring and tutoring;
- Organizational and team work training, including team leadership training;
- Training in decision-making, including determining priorities and problem solving;
- Citizenship training, including life skills training such as parenting and work behavior training;
- Civic engagement activities which promote the quality of life in a community; and
- Activities that place youth in a leadership role such as serving on a WDB's Standing Youth Committee.

Program Element 7: Supportive Services

Element Seven includes services that enable an individual to participate in WIOA activities. These services include, but are not limited to:

- Linkages to community services;
- Assistance with transportation;
- Assistance with child care and dependent care;

- Assistance with housing;
- Needs-related payments for (youth ages 18-24 enrolled in WIOA youth training services)
- Assistance with educational testing;
- Reasonable accommodations for youth with disabilities;
- Legal aid services;
- Referrals to health care;
- Assistance with uniforms or other appropriate work attire and work-related tools, including such items as eyeglasses and protective eye gear;
- Assistance with books, fees, school supplies, and other necessary items for students enrolled in postsecondary education classes; and
- Payments and fees for employment and training-related applications, tests, and certifications.

Program Element 8: Adult Mentoring

Element Eight defines the timeframe for adult mentoring as lasting at least 12 months. Adult mentoring may take place both during the program and following exit from the program. It may be a formal relationship between a youth participant and an adult mentor that includes structured activities where the mentor offers guidance, support, and encouragement to develop the competence and character of the mentee:

- The local youth program must match the youth with an individual mentor with whom the youth interacts on a face-to-face basis;
- Mentoring may include workplace mentoring where the local program matches a youth participant with an employer or employee of a company;
- Case managers are allowed to serve as mentors in areas where adult mentors are scarce.

Program Element 9: Follow-up services

Element Nine includes critical services provided following a youth's exit from the program to help ensure the youth is successful in employment and/or postsecondary education and training. Follow-up services may include regular contact with a youth participant's employer, including assistance in addressing work-related problems that arise.

Follow-up services may begin immediately following the last expected date of service in the Youth program when no future services are scheduled. Follow-up services do not cause the exit date to change and do not trigger re-enrollment in the program.

Five program elements are permitted as follow-up services during the follow-up period:

- Supportive Services;
- Adult Mentoring;
- Financial Literacy Education;
- Services that provide labor market and employment information about in-demand industry sectors or occupations available in the local area, such as career awareness, career counseling, and career exploration services; and
- Activities that help youth prepare for and transition to postsecondary education and training.

Please Note: Any program element other than the 5 listed above requires reenrollment in the program in order for a youth to receive them.

Also note these additional requirements:

- All youth participants must be offered an opportunity to receive follow-up services that align with their individual service strategies for a minimum of 12 months unless the participant declines to receive follow-up services or the participant cannot be located or contacted;
- The types of services provided and the duration of services must be determined based on the needs of the individual and therefore, the type and intensity of follow-up services may differ for each participant;
- Follow-up services must include more than only a contact attempted or made for securing documentation in order to report a performance outcome;
- Local programs should have policies in place to establish how to document and record when a participant cannot be located or contacted;
- At the time of enrollment, youth must be informed that follow-up services will be provided for 12 months following exit. If at any point in time during the program or during the 12 months following exit the youth requests to opt out of follow-up services, they may do so.

Program Element 10: Comprehensive guidance and counseling

Element Ten includes comprehensive guidance and counseling that provides individualized counseling to participants. This includes drug and alcohol abuse counseling, mental health counseling, and referral to partner programs, as appropriate.

When referring participants to necessary counseling that cannot be provided by the local youth program or its service providers, the local youth program must coordinate with the organization it refers to in order to ensure continuity of service. When resources exist within the local program or its service providers, it is allowable to provide counseling services directly to participants rather than refer youth to partner programs.

Program Element 11: Financial Literacy Education

Element Eleven is financial literacy education. Youth providers may use the free resource below to deliver “Financial Literacy Education” which will satisfy this specific Youth Program Element. The State of Oklahoma released this resource to local areas in 2015 and it is continues to be a viable tool.

- Developed by the Consumer Financial Protection Bureau (CFPB) Federally Sponsored;
- It is a financial empowerment toolkit for social programs to equip frontline staff with fundamental financial empowerment principles, an understanding of consumer protection issues, tools and skills to help clients understand what financial empowerment and stability mean for them and to refer clients to other related local financial empowerment services.
- Link: <http://www.consumerfinance.gov/your-money-your-goals/>
- Videos: <https://www.youtube.com/watch?v=Q-3X6ciTjP0&feature=youtu.be&list=PLrfdmUIWzRF2-wzQblJaR3vVERdc3Thqk>

Program element 11 may include activities:

- To support the ability of participants to create budgets, initiate checking and savings accounts at banks, and make informed financial decisions;
- To support participants in learning how to effectively manage spending, credit, and debt, including student loans, consumer credit, and credit cards;
- That teach participants about the significance of credit reports and credit scores, what their

rights are regarding their credit and financial information, how to determine the accuracy of a credit report, how to correct inaccuracies, and how to improve or maintain good credit;

- That support a participant's ability to understand, evaluate, and compare financial products, services, and opportunities and to make informed financial decisions;
- That educate participants about identity theft, ways to protect themselves from identify theft, and how to resolve cases of identity theft and in other ways understand their rights and protections related to personal identity and financial data;
- That support activities that address the particular financial literacy needs of non-English speakers, including providing the support through the development and distribution of multilingual financial literacy and education materials;
- That support activities that address the particular financial literacy needs of youth with disabilities, including connecting them to benefits planning and work incentives counseling;
- That provide financial education that is age appropriate, timely, and provides opportunities to put lessons into practice, such as by access to safe and affordable financial products that enable money management and savings; and
- Implement other approaches to help participants gain the knowledge, skills, and confidence to make informed financial decisions that enable them to attain greater financial health and stability by using high quality, age-appropriate, and relevant strategies and channels, including, where possible, timely and customized information, guidance, tools, and instruction.

Program Element 12: Entrepreneurial Skills Training

Element Twelve includes entrepreneurial skills training, which provides the basics of starting and operating a small business. Such training must develop the skills associated with entrepreneurship. Such skills may include, but are not limited to the ability to:

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

Approaches to teaching youth entrepreneurial skills may include, but are not limited to:

- Entrepreneurship education that provides an introduction to the values and basics of starting and running a business. Entrepreneurship education programs often guide youth through the development of a business plan and also may include simulations of business start-up and operation,
- Enterprise development which provides supports and services that incubate and help youth develop their own businesses. Enterprise development programs go beyond entrepreneurship education by helping youth access small loans or grants that are needed to begin business operation and by providing more individualized attention to the development of viable business ideas; and
- Experiential programs that provide youth with experience in the day-to-day operation of a business. These programs may involve the development of a youth-run business that young people participating in the program work in and manage. Or, they may facilitate placement in

apprentice or internship positions with adult entrepreneurs in the community.

Program Element 13: Services that provide labor market information

Element Thirteen includes services that provide labor market and employment information about in-demand industry sectors or occupations available in the local area, such as career awareness, career counseling, and career exploration services.

WIOA youth programs and providers should become familiar with state and federal LMI data and LMI tools, which are provided for free by agencies, in order to share relevant LMI with youth. DOL electronic tools particularly relevant to youth include My Next Move at <https://www.mynextmove.org/>, and Get My Future at <https://www.careeronestop.org/GetMyFuture>.

Another resource available is OKCareerGuide.org at <https://okcareerguide.kuder.com/landing-page>, where youth can learn about their interests, skills and values with Journey's research-based assessments; plan their education and career goals based on real-time assessments; and succeed by making confident career choices via Journey's career planning tools.

Program Element 14: Postsecondary preparation and transition activities

Element Fourteen prepares ISY and OSY for advancement to post-secondary education after attaining a high school diploma or its recognized equivalent. These services include exploring post-secondary education options including technical training schools, community colleges, 4-year colleges and universities, and Registered Apprenticeship.

Additional services include, but are not limited to:

- Assisting youth to prepare for SAT/ACT testing;
- Assisting with college admission applications;
- Searching and applying for scholarships and grants;
- Filling out the proper Financial Aid applications and adhering to changing guidelines; and
- Connecting youth to postsecondary education programs such as OkCollegeStart.org at <https://www.okcollegestart.org/>.

Additional Notes on Documenting and Reporting Program Elements:

Documenting receipt of program elements is critical to ensure that youth who are actively participating in programs do not get unintentionally exited due to 90 days of no service. All 14 WIOA youth program elements are contained in the PIRL and local youth programs should ensure that services received are reported in the applicable program element in the PIRL.

Contact with a participant for case management purposes is not considered a program service and will not prevent a program exit from occurring.

In addition, case management is the act of connecting youth to appropriate services and not a program element. Case managers providing case management should not be reported as one of the 14 youth program elements in the PIRL.

Exited participants must have eligibility re-determined and a new enrollment approved to receive additional program services. However, if a participant has completed the last service in the ISS such as work experience and enters follow-up, but later determines that they need additional services beyond the 5 elements allowed in follow-up and the youth has not exited; the case manager could

revise the ISS in agreement with the youth and provide elements as needed beyond the 5 allowed in follow-up.

Each element may be tied to multiple services. All services, including those not funded with Title 1 youth funds, must be documented by entry into the youth's service and training plan as outlined in Attachment A of this policy with the provider of the service documented accordingly. The provider of the service should be the entity, employer or training provider actually providing the service and not the local contracted youth service provider. All services entered must have a correlating program note entry. A program service must be given every 90 days at a minimum. Participants that go over 90 days without a staff assisted program service will exit from the program. Exited participants must have eligibility re-determined and a new enrollment approved to receive additional program services.

Contact with a participant for case management purposes is not considered a program service and will not prevent a program exit from occurring.

Indicators of Performance

1. Placement in Employment, Education or Training:
The percentage of program participants who are in education, training activities or in unsubsidized employment during the second quarter after exit from the program.
2. Retention in Employment, Education or Training:
The percentage of program participants who are in education, training activities or unsubsidized employment during the fourth quarter after exit from the program.
3. Earnings after entry into Employment
Median earnings in the second quarter after exit.
4. Credential/Diploma Rate:
Attainment of a secondary diploma or equivalent, or a recognized post-secondary credential during participation or within one year after exit from the program.
5. Skills Gain:
Percentage of participants in education leading to credential or employment during the program year and achieving measurable gains towards the credential or employment.

Documentation

All characteristics that apply to the client **must** be correctly and accurately entered into the State's virtual case management system and self-attested to by the participant prior to each program enrollment. Basic demographic characteristics not used for eligibility must be verified by **virtual self-attestation**. Characteristics used to determine eligibility **must** be indicated on **Attachment B**, The WIOA Youth Eligibility Form. In addition to **Attachment B**, the documents used to verify eligibility and service provision **must be scanned and uploaded** as outlined in **Attachment A** of this policy.

1. **Self-Attestation** prior to enrollment into the WIOA Youth Program requires that all demographic information entered in the virtual case management system by the client during the self-registration be reviewed for accuracy. In addition, demographic information needed for eligibility determination must be added by the participant and case manager prior to the

participant's self-attestation by virtual signature. If the youth is under the age of 18, a parental, guardian or other responsible adult must sign the virtual signature for self-attestation. *It is imperative that this information be correct prior to the participant's self-attestation.* Self-Attestation occurs when:

- Staff and participant will review all basic demographic characteristics recorded in the participant's Demographic Snapshot prior to the participant's enrollment into a WIOA funded program. The participant then self-attests that the information reviewed prior to the program enrollment is true and correct by entering a "virtual signature." Staff may at that point proceed to the appropriate WIOA Program enrollment and, after the upload of Attachment B and the documents used to verify eligibility, the entry of the first program service.
 - If it is determined that the demographic characteristics obtained prior to the virtual signature and program enrollment were not accurate, a request for a correction to the snapshot can be made to the Oklahoma Office of Workforce Development. ***If the snapshot is corrected or changed after the initial self-attestation, the participant is required to return to the office and virtually resign the Demographic Snapshot in the virtual case file. The virtual signature can't be done remotely and must be done in the presence of the participant's case manager.***
- 2. Staff Verification** of eligibility and/or source documentation in the form of a detailed program note will be allowed for some program services and will be used to comply with some requirements as indicated in **Attachment A** of this policy when:
- Staff reviews allowable source document to determine accuracy of the data being validated and ensures the corresponding data entry match the information on the source document. Staff then records in Program Notes, as indicated in **Attachment A**. The following information *must* be included in the program note:
 - a. Specific data element being validated;
 - b. Specific source document used for verification;
 - c. Date the verification occurred, if different from the data entry date; and
 - d. Pertinent information as presented on the source document
- NOTE:** It is required that the staff person verifying the "source" document and information be the one entering the Program Note.
- 3. Scanned and uploaded documentation** is required to verify eligibility, data elements and service provision, as indicated in **Attachment A** of this policy. Eligibility must be documented prior to the participant's receipt of any program services. Documentation requirements are met when the following procedures are followed:
- Staff reviews and scans a copy of the appropriate source document used to verify the eligibility/data validation item and uploads the scanned document as outlined in **Attachment A**.
- 4. Virtual Case Files** may be used as a source for some criteria if detailed information is provided. For example, the system may be used to verify the date of the first training service if all of the following information is included in the service entry: actual start date, O*NET-SOC, CIP, Training Agent ID and Training Provider name.

5. **Telephone Verification** is yet another method of documenting eligibility criteria and/or the validity of certain data elements as indicated in **Attachment A**. The information obtained must be documented by completing the sample “Telephone Verification Form for Youth Programs” included as **Attachment D** or a similar board developed form. This form must be scanned and uploaded to the proper screens once complete.
6. **Program Notes** are required each time a participant receives a service, has a service update or outcome, and every time the case manager has contact with the participant. Program notes must be detailed and outline the facts pertaining to participation in the program. Changes in case managers and monitoring functions necessitate accurate and regular documentation of service delivery.

I. Types of Validation Rules

1. **Match** means the document used to verify the information must be exactly the same as the source document outlined in **Attachment A**. The information from the source document must match what has been entered in the case management system. For example, if the allowable source document is a birth certificate and date of birth is being verified, the date on the birth certificate must be exactly the same date entered in the virtual case file as the date of birth. It should be noted that whenever a date is entered into a virtual case file it must match exactly the date on the document used to verify the information.
2. **Support** means that the information contained in the documentation that was scanned and uploaded, documented in the Service and Training plan or detailed in a program note provides enough information to support the accuracy of the information in the participant’s virtual case file.

II. Specific Program Interpretations

1. **Selective Service Registration** – A male youth between the ages of 18-24 that cannot provide proof of Selective Service registration at the point of program enrollment is not eligible for participation in the WIOA programs and must be referred to the Selective Service for registration. Program enrollment may commence after the registration process has been completed. If a youth is less than 18 years of age at the time of enrollment into the WIOA Youth Program but turns 18 while still receiving WIOA funded services, the Case Manager must verify the youth has registered with Selective Service and document the registration per validation method and data entry requirements outlined in **Attachment A** of this policy. Additional information on the registration process is available at www.sss.gov.
2. **Veteran Status and Priority of Service** – Service to veteran youth will follow the Priority of Service guidelines as established under the Veteran’s Employment and Training Service (VETS) program. There is a discrepancy between the allowed source documents used to validate veteran status under USDOLETA’s WIOA Data Element Validation policy, and verification requirements for participation in the VETS Program, which significantly hinders service delivery under the WIOA Youth Program. Specifically, the VETS Program eligibility allows self-attestation of veteran status with no source documentation to support the claim;

whereas a veteran that receives services under WIOA Title I programs, including the Youth Program, must provide a DD-214, a letter from the Veterans Administration or cross-match with veteran data. To maintain compliance with WIOA Title I Data Element Validation and provide veterans with the priority services they deserve, staff should not deny provision of services to a veteran who does not have a document verifying veteran status at the time the service is provided. The service must be given and a program note entered indicating that service was provided in keeping with the Veterans Priority of Service Policy and that the documentation will be obtained when the veteran returns for additional services.

- 3. Participant Characteristics: Needs and Barriers** – The virtual case management system will be used as the verification source for participant self-attestation of all demographic characteristics not used for eligibility determinations. All screens must be reviewed with the individual prior to the receipt of the first staff assisted service. Any characteristics that apply to that individual must be correctly and accurately entered prior to self-attestation and the entry of a program enrollment.

NOTE: Individuals must have paper or scanned documentation **only** for the characteristics, income status and needs and barriers used to establish eligibility to receive WIOA Youth services. Any characteristics not used to establish eligibility will be verified using self-attestation as the source.

- 4. Disability Status** – Even though WIOA requires that we inquire about an individual’s disability status, additional documentation/validation is not required unless needed for WIOA program eligibility. Customers are asked to *voluntarily respond* to a question about their disability status to comply with Equal Employment Opportunity programmatic eligibility requirements.

III. Document Uploader for Paperless Case Management

Oklahoma Job Match has been programmed with the ability to store scanned PDF documents and attach those documents to the virtual case file of a client receiving youth services. As defined in **Attachment A** of this policy, scanned and uploaded documentation will be required to verify eligibility, DEV, and service delivery. Documents must be scanned and uploaded as a PDF file. Although complete participant demographic characteristics must be recorded electronically in the case management system, scanned and uploaded documentation will be required only to verify criteria used for program eligibility, DEV, service delivery, and any other criteria as outlined in **Attachment A** of this policy. Program monitoring of the WIOA Youth program will be completed following the documentation requirements outlined in the policy. Hard copy case files will not be reviewed, all documentation pertaining to eligibility, service delivery must be uploaded and program outcomes must be documented in the exit questions screen and the program outcome screens as indicated by this policy.

Any information documented directly in the case management system such as program notes, eligibility snapshot, and the service and training plan does not need to be printed out and uploaded. Although program notes may be in order to clarify services, the virtual case management system is considered to be the source of the documentation.

EQUAL OPPORTUNITY AND NONDISCRIMINATION: All providers must comply with WIOA’s Equal Opportunity and Nondiscrimination provisions which prohibit discrimination on the basis of race, color, religion, sex (including pregnancy, childbirth, and related medical conditions, transgender

status, and gender identity), national origin (including limited English proficiency), age, disability, political affiliation or belief, or, for beneficiaries, applicants, and participants only, on the basis of citizenship status or participation in a WIOA Title-I financially assisted program or activity.

POLICY ADDENDA: The Executive Director is authorized to issue additional instructions, guidance, forms, etc., to further implement the requirements of this policy.

ATTACHMENTS:

- Attachment A – WIOA Youth Programs Documentation and Uploader Requirements
- Attachment B – WIOA Youth Eligibility Form
- Attachment C – WIOA Youth Support Form
- Attachment D – WIOA Youth Telephone Verification Form
- Attachment E – WIOA Income Calculation Worksheet, Part I and Part II
- Attachment F – WIOA Youth Dropout Status Form
- Attachment G - List of Acceptable Documents to Verify Eligibility to Work
- Attachment H – Youth Training Provider Procurement Form
- Attachment I – Individual Service Strategy (ISS)

APPROVED DATE: Full Board 09/13/18

REVISED: 07/28/19

APPROVED: 08/14/19

Eligibility Documentation and Uploader Requirements			
Data Element	Program Requirements	Definitions and Requirements	Acceptable Source Document
Age/Date of Birth (WIOA)	Reportable Individual Wagner-Peyser WIOA Adults WIOA Dislocated Worker WIOA Youth Dislocated Worker Grants TAA NFJP	WIOA Youth applicants must be between the ages of 14 to 24 at the time of program enrollment. WIOA Adult and Dislocated Worker (DLW) applicants must be 18 or older at the time of program enrollment.	<p>MATCH</p> <p><u>Basic Career Service Requirement</u></p> <ul style="list-style-type: none"> Participant self-attestation; AND Detailed Client Note verifying a source document from the list below <p><u>Individual Career Service & Training Service Requirement</u></p> <ul style="list-style-type: none"> Baptismal Record Birth Certificate DD-214 (Report of Transfer or Discharge Paper) Driver’s License Federal, State, or Local Government ID Card Hospital Record of Birth Passport Public Assistance/Social Service Records School Records or School ID Work Permit Cross-match with Department of Vital Statistics Tribal Records Court Records
Data Element	Program Requirements	Definitions and Requirements	Acceptable Source Document

<p>Selective Service Registration</p>	<p>WIOA Adults WIOA Dislocated Worker WIOA Youth</p>	<p>All males who are at least 18 years of age and born after December 31, 1959, and who are not in the armed service on active duty, must be register with the Selective Service (SS).</p> <p>Males who cannot provide proof of SS Registration must be referred to the SS for registration.</p> <p>*Youth: if a youth is under 18 years of age at the time of enrollment into the WIOA Youth Program but turns 18 while still receiving WIOA funded service, the Case Manager must verify the youth has registered with Selective Service and document the registration per validation method and OKJobMatch requirements outlined in this policy.</p>	<p>MATCH</p> <p><u>Basic Career Service Requirement</u></p> <ul style="list-style-type: none"> • Participant self-attestation; AND • Detailed Client Note verifying a source document from the list below <p><u>Individual Career Service & Training Service Requirement</u></p> <ul style="list-style-type: none"> • Selective Service Registration Card • Selective Service Status Information Letter • Selective Service Registration (Form 3A) • Selective Service Verification Form • Stamped Post Office Receipt of Registration • US Selective Service Verification (Internet) www.sss.gov <p>The following documents may be used only if the participate is past the age of 26 and has not registered with the Selective Service.</p> <ul style="list-style-type: none"> • DD-214 • Current Military ID
<p>Data Element</p>	<p>Program Requirements</p>	<p>Definitions and Requirements</p>	<p>Acceptable Source Document</p>

Eligible to Work in the United States	WIOA Adults WIOA Dislocated Worker WIOA Youth	The participant must be eligible to work in the United States at the time of program enrollment. Youth ages 16 and older must be eligible to work in the United States at the time of participation.	MATCH <u>Basic Career Service Requirement</u> <ul style="list-style-type: none"> Participant self-attestation <u>Individual Career Service & Training Service Requirement</u> <ul style="list-style-type: none"> Documents from Attachment J
Equal Opportunity Statement	Reportable Individual Wagner-Peyser WIOA Adults WIOA Dislocated Worker WIOA Youth Dislocated Worker Grants TAA NFJP	Equal Opportunity Statement must be provided for each participant. The Equal Opportunity (EO) Statement is available on the Case Details page under Universal Information. Staff must review the EO Statement with the participant and provide a printed copy for signature. To print the EO Statement from the Universal information page: Click on Printable Version, choose EEO Notice, Print preview, and print. The participant and staff may then sign the form.	Required <ul style="list-style-type: none"> Equal Opportunity Statement
Client Release	Reportable Individual Wagner-Peyser WIOA Adults WIOA Dislocated Worker WIOA Youth Dislocated Worker Grants TAA NFJP	A Client Release is required for each participant. A participant may virtually sign the Online Client Release located in the Case Details page under Universal Information. You may also choose to utilize the printable Client Release for an actual signature.	Required <ul style="list-style-type: none"> Client Release
Data Element	Program Requirements	Definitions and Requirements	Acceptable Source Document

<p>Ethnicity: Hispanic/Latino</p>	<p>Reportable Individual Wagner-Peyser WIOA Adults WIOA Dislocated Worker WIOA Youth Dislocated Worker Grants TAA NFJP</p>	<p>An individual indicates that he/she is a person of Cuban, Mexican, Puerto Rican, South or Central American, or other Spanish culture in origin, regardless of race.</p>	<p>Required</p> <ul style="list-style-type: none"> Participant self-attestation
<p>Race</p>	<p>Reportable Individual Wagner-Peyser WIOA Adults WIOA Dislocated Worker WIOA Youth Dislocated Worker Grants TAA NFJP</p>	<p>Indicate which race the individual indicates:</p> <p>(a) American Indian or Alaska Native: a member of an Indian tribe, band, nation, or other organized group or community, including any Alaska Native village or regional or village corporation which is recognized as eligible for the special programs and services provided by the United States to Indians because of their status as Indians.</p> <p>(b) Asian or Asian American: any of the original peoples of the Far East, Southeast Asia, or the Indian Subcontinent (e.g., India, Pakistan, Bangladesh, Sri Lanka, Nepal, Sikkim, and Bhutan). This area includes, for example, Cambodia, China, Japan, Korea, Malaysia, Pakistan, the Philippine Islands, Thailand, and Vietnam.</p> <p>(c) Black or African American: any of the black racial groups of Africa</p> <p>(d) Native Hawaiian or Other Pacific Islander: any of the original peoples of Hawaii, Guam, Samoa, or other Pacific Islands.</p> <p>(e) White or Caucasian: any of the original peoples of Europe, the Middle East, or North Africa</p>	<p>Required</p> <ul style="list-style-type: none"> Participant self-attestation
<p>Data Element</p>	<p>Program Requirements</p>	<p>Definitions and Requirements</p>	<p>Acceptable Source Document</p>

English Language Learner at Program Entry (WIOA)	Wagner-Peyser WIOA Adults WIOA Dislocated Worker WIOA Youth Dislocated Worker Grants TAA NFJP	An Individual at program entry who has limited ability in speaking, reading, writing or understanding the English language and also meets at least one of the following two conditions: a) His or her native language is a language other than English, or b) He or she lives in a family or community environment where a language other than English is the dominant language. *If the participant is an English language learner and answered YES : you <u>must</u> identify the Primary Language of the individual.	SUPPORTING <u>Basic Demographic Characteristic</u> • Participant self-attestation <u>Youth Eligibility Verification</u> • Participant self-attestation • Detailed Program Note • School records *If the participant is an English language learner and answered YES : the Primary Language of the individual must be identified.
Single Parent at Program Entry (WIOA)	Wagner-Peyser WIOA Adults WIOA Dislocated Worker WIOA Youth Dislocated Worker Grants TAA NFJP	An individual who at program entry, is single, separated, divorced or a widowed individual who has primary responsibility for one or more dependent children under age 18 (including single pregnant women).	Required • Participant self-attestation
Family Size	Reportable Individual Wagner-Peyser WIOA Adults WIOA Dislocated Worker WIOA Youth Dislocated Worker Grants TAA NFJP	For documentation and income verification a “family” is defined as 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 An individual with a disability may be treated as a family of one for income eligibility determination purposes.	Required • Participant self-attestation
Data Element	Program Requirements	Definitions and Requirements	Acceptable Source Document

<p>Individual with a Disability (WIOA)</p>	<p>Reportable Individual Wagner-Peyser WIOA Adults WIOA Dislocated Worker WIOA Youth Dislocated Worker Grants TAA NFJP</p>	<p>An individual may indicate that he/she has a disability as defined as a physical or mental impairment that substantially limits one or more of the person’s major life activities. Applicable categories are:</p> <ul style="list-style-type: none"> • Physical/Chronic Health Conditions • Physical/Mobility Impairments • Mental or Psychiatric Disability • Vision-related Disability • Hearing-related Disability • Learning Disability • Cognitive/Intellectual Disability • Participant may choose not to disclose type of disability <p><u>Youth Disability & Low Income</u> A youth applicant whose family income exceeds the low-income limit may still qualify for participation in the WIOA program provided that the applicant is an individual with a disability as defined by the Americans with Disabilities Act and has an individual income that does not exceed the greater of the Poverty Line or 70% of the Lower Living Standard Income Level.</p>	<p>SUPPORTING</p> <p><u>Career Service & Training Service Requirement</u></p> <ul style="list-style-type: none"> • Participant self-attestation <p><u>Youth Eligibility & Low Income Requirement</u></p> <ul style="list-style-type: none"> • Youth Support Form – Attachment G
<p>Individual with a Disability services</p>	<p>Wagner-Peyser WIOA Adults WIOA Dislocated Worker WIOA Youth Dislocated Worker Grants</p>	<p>Is the individual with a disability receiving services funded by a Local and/or State Agency by any of the following:</p> <ol style="list-style-type: none"> a) State Developmental Disabilities Agency (SDDA) b) Local and State Mental Health Agency (LSMHA) c) State Medicaid Home & Community-Based Services (HCBS) waiver 	<p>Required</p> <ul style="list-style-type: none"> • Participant self-attestation
<p>Data Element</p>	<p>Program Requirements</p>	<p>Definitions and Requirements</p>	<p>Acceptable Source Document</p>

Individual With A Disability Work Setting	Wagner-Peyser WIOA Adults WIOA Dislocated Worker WIOA Youth Dislocated Worker Grants	Determine if the individual with a disability is participating in one of the following work settings: a) Competitive Integrated Employment b) Individual Supported Employment (e.g. use of job coach, with integrated placement at competitive wages) c) Group Supported Employment (i.e., work crews, enclaves, etc.) d) Sheltered Workshop (i.e., center- or facility-based employment) e) Combination of two or more settings	Required • Participant self-attestation
Individual With A Disability Type of Customized Employment Services Received	Wagner-Peyser WIOA Adults WIOA Dislocated Worker WIOA Youth Dislocated Worker Grants	Determine if the individual with a disability has received one of the following Customized Employment Services (CES): a) Discovery assessment Services b) Developed a Customized Employment Search Plan c) Employer Negotiation Services d) Secured Employment as a result of Receiving Customized Employment Services and Received Extended Support Services	Required • Participant self-attestation
Individual With A Disability Financial Capability	Wagner-Peyser WIOA Adults WIOA Dislocated Worker WIOA Youth Dislocated Worker Grants	Determine if the individual with a disability has received one of the following: a) Benefit planning services b) Financial Capability/Asset Development Services c) Benefit Planning Services and Financial Capability/Asset Development Services	Required • Participant self-attestation
Data Element	Program Requirements	Definitions and Requirements	Acceptable Source Document

<p>Individual With a Disability Individualized Education Program Participant</p>	<p>WIOA Adults WIOA Youth</p>	<p>Determine if the individual with a disability has a Current or had a Previous Individualized Education Program / Special Education Services plan while attending Secondary School.</p> <p>An Individualized Education Program (IEP) is a plan used to ensure that students with disabilities are eligible to receive special education and related services under the Individuals with Disabilities Education Act and receive services tailored to meet their unique needs in the least restrictive environment to prepare them for further education, employment, and independent living (34 C.F.R. §300.340). To be eligible the student generally must be between ages 3 and 21, have a qualifying disability in one of the allowable categories that affects his or her educational performance, and be in need of special education and related services.</p>	<p>Required</p> <ul style="list-style-type: none"> Participant self-attestation
<p>Data Element</p>	<p>Program Requirements</p>	<p>Definitions and Requirements</p>	<p>Acceptable Source Document</p>

<p>Individual With a Disability Section 504 Plan</p>	<p>WIOA Adults WIOA Youth</p>	<p>Determine if the individual with a disability has a Section 504 Plan</p> <p>Section 504, of the Rehabilitation Act, 29 U.S.C. § 794, is a federal law that protects students with disabilities that interfere with their ability to learn or access school programs from discrimination by schools receiving Federal financial assistance. Under Section 503 students are entitled to receive a free and appropriate education comparable to students without disabilities. A Section 504 Plan can be used to get reasonable accommodations for an individual with a disability that falls outside of the 13 disability categories required under Individuals with Disabilities Education Act (IDEA), or who does not need special education and related services. A Section 504 plan outlines how the individual’s specific needs will be met through accommodations, modifications and other services.</p>	<p>Required</p> <ul style="list-style-type: none"> Participant self-attestation
<p>Data Element</p>	<p>Program Requirements</p>	<p>Definitions and Requirements</p>	<p>Acceptable Source Document</p>

<p>School Status at Program Entry (WIOA)</p>	<p>Wagner-Peyser WIOA Adults WIOA Dislocated Worker WIOA Youth Dislocated Worker Grants NFJP</p>	<p>School Status at Program Entry is:</p> <ul style="list-style-type: none"> • In-School, Secondary School or Less: an individual who has not received a secondary school diploma or its recognized equivalent and is attending any primary or secondary school (including elementary, intermediate, junior high school, whether full or part-time), or is between school terms and intends to return to school. • In-School, Alternative School: an individual who has not received a secondary school diploma or its recognized equivalent and is attending an alternative high school or an alternative course of study approved by the local educational agency whether full or part-time, or is between school terms and is enrolled to return to school. • In-School, Postsecondary School: an individual who has received a secondary school diploma or its recognized equivalent and is attending a postsecondary school or program (whether full or part-time), or is between school terms and is enrolled to return to school. • Not Attending School or Secondary School Dropout: an individual who is not within the age of compulsory school attendance; and is no longer attending any school and has not received a secondary school diploma or its recognized equivalent. • Not attending school; Secondary School Graduate or has a Recognized Equivalent: an individual who is not attending any school and has either graduated from secondary school or has attained a secondary school equivalency. • Not attending School: Within Age of Compulsory School Attendance: an individual who is within the age of compulsory school attendance, but has not attended school for at least the most recent complete school year calendar quarter and has not received a secondary school diploma or its recognized equivalent. • 	<p>SUPPORTING</p> <p><u>Youth Eligibility Verification, Career Service & Training Service Requirement</u></p> <ul style="list-style-type: none"> • Participant self-attestation • Parent, Guardian, or other responsible adult attestation (*required for individuals under 18) • Secondary School Diploma or Recognized equivalent • Attendance Record • Transcripts • School Documentation • Dropout letter • School Dropout Status Form – Attachment H
<p>Data Element</p>	<p>Program Requirements</p>	<p>Definitions and Requirements</p>	<p>Acceptable Source Document</p>

<p>Highest Educational Level Completed at Program Entry (WIOA)</p>	<p>Wagner-Peyser WIOA Adults WIOA Dislocated Worker WIOA Youth Dislocated Worker Grants TAA NFJP</p>	<p>Define the highest educational level completed by the individual at program entry:</p> <ol style="list-style-type: none"> a) Record the number of last school grade completed 1-12 b) High School Graduate c) High School Certificate of Attendance/Completion: A participant with a disability receives a certificate as a result of successfully completing an Individualized Education Program (IEP) d) Attained Certificate of Equivalency for a HS Diploma e) 1 Yr College/FT Technical or Vocational School f) 2 Yr College/FT Technical or Vocational School g) Vocational/Technical Degree h) Associate's Degree i) Bachelor's Degree or Equivalent j) Professional Degree k) Education beyond the Bachelor's Degree l) Master's Degree m) Doctoral Degree n) Occupational Skills License or Certification 	<p>Required</p> <ul style="list-style-type: none"> • Participant self-attestation
<p>Veteran Status</p>	<p>Wagner-Peyser WIOA Adults WIOA Dislocated Worker WIOA Youth Dislocated Worker Grants TAA NFJP</p>	<p>An individual who served on active duty in the armed forces and who was discharged or released from such service under conditions other than dishonorable.</p>	<p>Required</p> <ul style="list-style-type: none"> • Participant self-attestation
<p>Data Element</p>	<p>Program Requirements</p>	<p>Definitions and Requirements</p>	<p>Acceptable Source Document</p>

Eligible Veteran Status	Reportable Individual Wagner-Peyser WIOA Adults WIOA Dislocated Worker WIOA Youth Dislocated Worker Grants TAA NFJP	An Individual who: <ul style="list-style-type: none"> • served in the active U.S. military, for a period of less than or equal to 180 days, and who was discharged or released from such service under conditions other than dishonorable, or • served on active duty for a period of more than 180 days and was discharged or released with other than a dishonorable discharge; or was discharged or released because of a service connected disability; or as a member of a reserve component under an order to active duty pursuant to section 167 (a), (d), or, (g), 673(a) of Title 10, U.S.C., served on active duty during a period of war or in a campaign or expedition for which a campaign badge is authorized and was discharged or released from such duty with other than a dishonorable discharge, or • is (a) the spouse of any person who dies on active duty or of a service connected disability, (b) the spouse of any member of the Armed Forces serving on active duty who at the time of application for assistance under this part, is listed, pursuant to 38 U.S.C 101 and the regulations issued there under, by the Secretary concerned, in one or more of the following categories and has been so listed more than 90 days: <ul style="list-style-type: none"> ○ missing in action; ○ captured in the line of duty by a hostile force; ○ forcibly detained or interned in the line of duty by a foreign government or power; or (c) is the spouse of any person who has a total disability permanent in nature resulting from a service-connected disability or the spouse of a veteran who died while a disability so evaluated was in existence. 	<p>SUPPORTING</p> <p>Required</p> <ul style="list-style-type: none"> • Participant self-attestation <p><u>Career Service & Training Service Requirement</u></p> <ul style="list-style-type: none"> • DD-214 • Letter from the Veterans Administration • Cross-Match with Veterans Data <p>*If a source document is not available at the time a service is provided a case note must be entered indicating that program service was provided in keeping with the Veterans Priority of Service Policy and that the documentation will be obtained when the veteran returns for additional services.</p>
Data Element	Program Requirements	Definitions and Requirements	Acceptable Source Document

Date of Actual Military Separation	Wagner-Peyser WIOA Adults WIOA Dislocated Worker WIOA Youth Dislocated Worker Grants TAA	The date on which the participant separated from active duty with the U.S. armed forces.	Required • Participant self-attestation
Transitioning Service Member	Wagner-Peyser WIOA Adults WIOA Dislocated Worker WIOA Youth Dislocated Worker Grants TAA	An individual who is on active military duty status (including separation leave) with the U.S. armed forces and within 24 months of retirement or 12 months of separation from the armed forces.	Required • Participant self-attestation
Campaign Veteran	Wagner-Peyser WIOA Youth TAA	An individual is an eligible veteran who served on active duty in the U.S. armed forces during a war or in a campaign or expedition for which a campaign badge or expeditionary medal has been authorized as identified and listed by the Office of Personnel Management (OPM). A current listing of the campaigns can be found at OPM's website http://www.opmlgov/policy-data-oversight/veterans-services/vet-guide	Required • Participant self-attestation
Data Element	Program Requirements	Definitions and Requirements	Acceptable Source Document

Homeless Veteran	Wagner-Peyser WIOA Adults WIOA Dislocated Worker WIOA Youth Dislocated Worker Grants	<p>An individual who served in the active military, naval, or air service, and who was discharged or released from such service under conditions other than dishonorable, and who lacks a fixed, regular, and adequate night time residence. This definition includes any individual who has a primary night time residence that is a publicly or privately operated shelter for temporary accommodation; an institution providing temporary residence for participants intended to be institutionalized; or a public or private place not designated for or ordinarily used as a regular sleeping accommodation for human beings.</p> <p>*This definition does not include a participant imprisoned or detained under an Act of Congress or State law. A participant who may be sleeping in a temporary accommodation while away from home should not, as a result of that alone, be recorded as homeless.</p>	<p>Required</p> <ul style="list-style-type: none"> Participant self-attestation
Homeless Veterans' Reintegration Program Participant	Reportable Individual Wagner-Peyser WIOA Adults WIOA Dislocated Worker WIOA Youth	<p>An individual who is a veteran who is enrolled in the Homeless Veterans' Reintegration Program (HVRP), Incarcerated Veterans Transition Program (IVTP), or Homeless Female Veterans and Veterans with Families (HFVWWF) Reintegration Program in their area.</p>	<p>Required</p> <ul style="list-style-type: none"> Participant self-attestation
Data Element	Program Requirements	Definitions and Requirements	Acceptable Source Document

Disabled Veteran	Wagner-Peyser WIOA Adults WIOA Dislocated Worker WIOA Youth Dislocated Worker Grants TAA	<p>An individual who is a veteran who served on active duty in the U.S. armed forces and who is entitled to compensation regardless of rating (including those rated at 0%); or who but for the receipt of military retirement pay would be entitled to compensation, under laws administered by the Department of Veterans Affairs (DVA); or was discharged or released from active duty because of a service-connected disability.</p> <p>OR</p> <p>An individual who is a veteran who served on active duty in the U.S. armed forces and who is entitled to compensation (or who, but for the receipt of military retirement pay would be entitled to compensation) under laws administered by the DVA for a disability, (i) rated at 30 percent or more or, (ii) rated at 10 or 20 percent in the case of a veteran who has been determined by DVA to have a serious employment handicap.</p>	<p>Required</p> <ul style="list-style-type: none"> Participant self-attestation
Data Element	Program Requirements	Definitions and Requirements	Acceptable Source Document

<p>Migrant and Seasonal Farmworker (MSFW) Designation</p>	<p>Wagner-Peyser WIOA Adults WIOA Dislocated Worker WIOA Youth Dislocated Worker Grants TAA</p>	<p>Determine if an individual is a Seasonal Farmworker or a Migrant Farmworker.</p> <p>A Seasonal Farmworker is an individual who is employed, or was employed in the past 12 months, in farm work of a seasonal or other temporary nature and is not required to be absent overnight from his/her permanent place of residence. Non-migrant individuals who are full-time students are excluded. Labor is performed on a seasonal basis where ordinarily, the employment pertains to, or is of the kind exclusively performed at certain seasons, or periods of the year and which, from its nature, may not be continuous or carried on throughout the year. A worker, who moves from one seasonal activity to another, while employed in farm work, is employed on a seasonal basis even though he/she may continue to be employed during a major portion of the year. A worker is employed on other temporary basis where he/she is employed for a limited time only or his/her performance is contemplated for a particular piece of work, usually of short duration. Generally, employment which is contemplated to continue indefinitely is not temporary.</p> <p>A Migrant Farmworker is a seasonal farmworker (as defined above) who travels to the job site so that the farmworker is not reasonably able to return to his/her permanent residence within the same day. Full-time students traveling in organized groups rather than with their families are excluded.</p>	<p>Required</p> <ul style="list-style-type: none"> Participant self-attestation
<p>Data Element</p>	<p>Program Requirements</p>	<p>Definitions and Requirements</p>	<p>Acceptable Source Document</p>

<p>Migrant and Seasonal Farmworker Status at National Farmworker Jobs Program Entry (WIOA sec. 167)</p>	<p>Wagner-Peyser WIOA Adults WIOA Dislocated Worker WIOA Youth Dislocated Worker Grants NFJP</p>	<p>Determine if an individual is a Seasonal Farmworker or a Migrant Farmworker at National Farmworker Jobs Program Entry.</p> <p>a) Seasonal Farmworker Adult: is an individual at program entry who is a low-income individual who for the 12 consecutive month out of the 24 months prior to application for the program involved, has been primarily employed in agriculture or fish farming labor that is characterized by chronic unemployment or underemployment; and faces multiple barriers to economic self-sufficiently.</p> <p>b) Migrant Farmworker Adult: is an individual at program entry is a seasonal farmworker and whose agricultural labor requires travel to a job site such that the farmworker is unable to return to a permanent place of residence within the same day.</p> <p>c) MSFW youth: Is an individual who is a migrant farmworker or seasonal farmworker as defined above and is between the age of 14-24.</p> <p>d) Dependent Adult: An individual who is an adult program participant and a dependent of the individual described as a seasonal or migrant seasonal farmworker above.</p> <p>e) Dependent Youth: An individual who is a youth program participant and a dependent of the individual described as a seasonal or migrant seasonal farmworker above.</p>	<p>Required</p> <ul style="list-style-type: none"> Participant self-attestation
<p>Data Element</p>	<p>Program Requirements</p>	<p>Definitions and Requirements</p>	<p>Acceptable Source Document</p>

<p>Employment Status at Program Entry (WIOA)</p>	<p>Wagner-Peyser WIOA Adults WIOA Dislocated Worker WIOA Youth Dislocated Worker Grants TAA NFJP</p>	<p>Employment Status at Program entry is:</p> <ul style="list-style-type: none"> • Employed: an individual currently working as a paid employee, performing any work at all in his or her own business, profession, or farm, performing any work as an unpaid worker in an enterprise operated by a member of the family or, one who is not working, but currently has a job or business from which he or she is temporarily absent because of illness, bad weather, vacation, labor-management dispute, or personal reasons, whether or not paid by the employer for time-off, and whether or not seeking another job. • Employed, but Received Notice of Termination of Employment or Military Separation: an individual who although employed either has received a notice of termination of employment or the employer has issued a Worker Adjustment and Retraining Notification (WARN) or other notice that the facility or enterprise will close, or is a transitioning service member (i.e., within 12 months of separation or 24 months of retirement). • Not in Labor Force: an individual is not in the labor force (not employed and are not actively looking for work, including those who are incarcerated). • Not Employed/Unemployed: an individual who is not employed but is seeking employment, makes specific effort to find a job, and is available for work. 	<p>SUPPORTING</p> <p>Required</p> <ul style="list-style-type: none"> • Participant self-attestation <p><u>Career Service & Training Service Requirement</u></p> <ul style="list-style-type: none"> • Pay Stubs • Detailed Program Note
<p>Data Element</p>	<p>Program Requirements</p>	<p>Definitions and Requirements</p>	<p>Acceptable Source Document</p>

<p>Long-Term Unemployed at Program Entry (WIOA)</p>	<p>Wagner-Peyser WIOA Adults WIOA Dislocated Worker WIOA Youth Dislocated Worker Grants NFJP</p>	<p>An individual, at program entry, who has been unemployed for 27 or more consecutive weeks.</p>	<p>Required</p> <ul style="list-style-type: none"> Participant self-attestation
<p>Underemployed Worker</p>		<p>An individual, at program entry, is an underplayed worker if they are not currently connected to a full-time job commensurate with the individual’s level of education, skills, or wage and/or salary earned previously, or who have obtained only episodic, short-term, or part-time employment.</p>	<p>Required</p> <ul style="list-style-type: none"> Participant self-attestation
<p>Data Element</p>	<p>Program Requirements</p>	<p>Definitions and Requirements</p>	<p>Acceptable Source Document</p>

<p>Dislocated Worker (WIOA)</p>	<p>Wagner-Peyser WIOA Adults WIOA Dislocated Worker Dislocated Worker Grants TAA NFJP</p>	<p>An Individual who meets one of the 5 categories below:</p> <p>1) Recently Dislocated: (a) has been terminated or laid off, or has received a notice of termination or layoff, from employment; AND (b) is eligible for or has exhausted entitlement to unemployment compensation; <u>or</u> has been employed for a duration sufficient to demonstrate attachment to the workforce, but is not eligible for unemployment compensation due to insufficient earnings or having performed services for an employer that were not covered under a State unemployment compensation law; AND (c) is <u>unlikely</u> to return to a previous industry or occupation</p> <p>2) Permanent closure / Substantial Layoff: (a) has been terminated or laid off, or has received a notice of termination or layoff, from employment as a result of any permanent closure of, or any substantial layoff at, a plant, facility, or enterprise; or (b) is employed at a facility at which the employer has made a general announcement that such facility will close within 180 days; or (c) for purposes of eligibility to receive services other than training services, career services, or supportive services, is employed at a facility at which the employer has made a general announcement that such facility will close</p> <p>3) Self-Employed: (a) was self-employed (including employment as a farmer, a rancher, or a fisherman) but is unemployed</p>	<p>SUPPORTING</p> <p><u>Eligibility Verification, Career Service & Training Service Requirement</u></p> <p>1) Recently Dislocated:</p> <ul style="list-style-type: none"> • Participant self-attestation • Notice of Layoff • TAA Certification <p>AND</p> <ul style="list-style-type: none"> • Current unemployment insurance verification • Current Reemployment Service Registration <p>AND</p> <ul style="list-style-type: none"> • Labor Market Information that indicates lack of industry/occupation availability • Doctors statement indicating inability to return to previous industry/occupation due to physical limitations • Participant self-attestation <p>2) Permanent Closure / Substantial Layoff:</p> <ul style="list-style-type: none"> • Participant self-attestation • Notice of Layoff • Written Employer Statement • Media Announcement with employment verification (pay stub, etc.) • TAA Certification • WARN listing affected employees
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		<p>as a result of general economic conditions in the community in which the participant resides or because of natural disasters;</p> <p>4) Displaced Homemaker: An individual who has been providing unpaid services to family members in the home and who: (a) has been dependent on the income of another family member but is no longer supported by that income: or (b) is the dependent spouse of a member of the Armed Forces on active duty and whose family income is significantly reduced because of deployment, a call or order to active duty, a permanent change of station, or the service-connected death or disability of the member; AND (c) is unemployed or underemployed and is experiencing difficulty in obtaining or upgrading employment.</p> <p>5) Military Spouse: (a) is the spouse of a member of the Armed Forces on active duty, and who has experienced a loss of employment as a direct result of relocation to accommodate a permanent change in duty station of such member; or (b) is the spouse of a member of the Armed Forces on active duty and who is unemployed or underemployed and is experiencing difficulty in obtaining or upgrading employment.</p> <p>* It is important to keep in mind that some categories will require more than one document to verify eligibility.</p>	<p>3) Self-Employed:</p> <ul style="list-style-type: none"> • Participant self-attestation • Bankruptcy documents listing both the name of the business and the individuals name • Business License • Most Recent Tax Return <p>AND</p> <ul style="list-style-type: none"> • Documentation showing disaster caused business closure • Documentation showing poor economic condition in the community or surrounding area caused business closure <p>4) Displaced Homemaker:</p> <ul style="list-style-type: none"> • Participant self-attestation • Divorce Papers • Court Records • Spouse’s layoff notice • Spouse’s death records • Military Orders <p>5) Military Spouse:</p> <ul style="list-style-type: none"> • Participant self-attestation • Military Orders
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Data Element	Program Requirements	Definitions and Requirements	Acceptable Source Document
Date of Actual Dislocation	Wagner-Peyser WIOA Adults WIOA Dislocated Worker Dislocated Worker Grants TAA	<p>The individual's date of actual separation or dislocation from employment is the last day of employment at the dislocation job. This does not apply if there is no dislocation job such as in a displaced homemaker that did not work outside of the home.</p> <p>TAA: The individual's most recent date of separation from trade-impacted employment that qualifies the participant to receive benefits and/or services under the Trade Act.</p>	<p>MATCH</p> <p><u>Eligibility Verification, Career Service & Training Service Requirement</u></p> <ul style="list-style-type: none"> • Participant self-attestation • Employer Verification • Rapid Response List • Notice of Layoff • Public Announcement with UI verification
Data Element	Program Requirements	Definitions and Requirements	Acceptable Source Document

<p>Low Income Status at Program Entry (WIOA)</p>	<p>Wagner-Peyser WIOA Adults WIOA Dislocated Worker WIOA Youth Dislocated Worker Grants NFJP</p>	<p>Priority of service must be given to individuals who meet one of the following qualifying criteria for low income An individual who –</p> <p>a) receives, or in the 6 months prior to application to the program has received, or is a member of a family that is receiving or in the past 6 months prior to application to the program has received assistance through the Supplemental Nutrition Assistance Program (SNAP);</p> <p>b) receives, or in the 6 months prior to application to the program has received, or is a member of a family that is receiving or in the past 6 months prior to application to the program has received assistance through the Temporary Assistance for Needy Families (TANF) program;</p> <p>c) receives, or in the 6 months prior to application to the program has received, or is a member of a family that is receiving or in the past 6 months prior to application to the program has received assistance through the Supplemental Security Income (SSI) program;</p> <p>d) receives or in the past 6 months prior to application to the program has received, or is a member of a family that is receiving or in the past 6 months prior to application to the program has received cash payments under the a federal, state, or local income based public assistance program;</p> <p>e) received an income, or is a member of a family that received a total family income for the 6-month period prior to application for</p>	<p>SUPPORTING</p> <p><u>Basic Career Service Requirement</u></p> <ul style="list-style-type: none"> • Participant self-attestation • Detailed Program Note <p><u>Youth Eligibility, Individual Career Service & Training Service Requirement</u></p> <ul style="list-style-type: none"> • Supplemental Nutrition Assistance Program (SNAP) Verification • Temporary Assistance for Needy Families (TANF) Verification • Social Security Benefits (SSI) Verification • Social Security Disability Insurance (SSDI) • Public Assistance Verification • Housing Authority Verification • Alimony Agreement • Bank Statements • Compensation Award Letter • Employer Statement • Family or Business Financial Records • Pay Stub • Pension Statement • Quarterly Estimated Tax for Self-Employed Person • Current Unemployment Insurance Verification
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		<p>the program that does not exceed the higher of the poverty line or 70% of the lower living standard income level;</p> <p>f) is a foster child on behalf of whom State or local government payments are made;</p> <p>g) is an individual with a disability and whose own income does not exceed the poverty line but who is a member of a family whose income does not meet this requirement;</p> <p>h) is a homeless participant or a homeless child or youth or runaway youth;</p> <p>i) Is a Youth who receives, or is eligible to receive a free or reduced price lunch;</p> <p>j) is a foster child on behalf of whom State or local government payments are made; or</p> <p>k) is a Youth living in a high-poverty area.</p>	
Data Element	Program Requirements	Definitions and Requirements	Acceptable Source Document

Public Assistance Information	Wagner-Peyser WIOA Adults WIOA Dislocated Worker WIOA Youth Dislocated Worker Grants TAA NFJP	<p>If the participant is receiving or has received cash assistance or other support services from any of the following agencies in the prior 6 months, the documentation must support the applicable agency. If the participant is receiving individual career services or training services, documentation is required from at least one agency the participant is receiving public assistance from.</p> <p>Temporary Assistance to Needy Families (TANF) (TAA Program Requirements)</p> <p>Supplemental Security Income (SSI)</p> <p>Social Security Disability Insurance (SSDI)</p> <p>Supplemental Nutrition Assistance Program (SNAP)</p> <p>Other Public Assistance Recipient:</p> <ul style="list-style-type: none"> • General Assistance (State/local government), • Refugee Cash Assistance (RCA) 	<p>SUPPORTING</p> <p><u>Basic Career Service Requirement</u></p> <ul style="list-style-type: none"> • Participant self-attestation • Detailed Program Note <p><u>Individual Career Service & Training Service Requirement</u></p> <ul style="list-style-type: none"> • TANF Verification • SSI Verification • SSDI Verification • SNAP Verification • General (State/Local Government) Public Assistance Verification • Refugee Assistance Verification • Copy of Public Assistance Check • Copy of Authorization to Receive Cash Public Assistance • Medical card showing cash grant status
Data Element	Program Requirements	Definitions and Requirements	Acceptable Source Document

<p>Basic Skills Deficient/Low Levels of Literacy at Program Entry</p>	<p>Wagner-Peyser WIOA Adults WIOA Dislocated Worker WIOA Youth Dislocated Worker Grants TAA NFJP</p>	<p>An individual who is:</p> <p>a) A Youth, that has English reading, writing, or computing skills at or below the 8th grade level on a generally accepted standardized test; or</p> <p>b) A Youth or Adult, that is unable to compute or solve problems, or read, write, or speak English, at a level necessary to function on the job, in the individual’s family, or in society.</p> <p>*Grade level scores below 9.0 (i.e. 8.9) should be considered a "at or below the 8th grade level.</p>	<p>SUPPORTING</p> <p>Required</p> <ul style="list-style-type: none"> Participant self-attestation <p><u>Eligibility Verification, Career Service, & Training Service Requirement</u></p> <ul style="list-style-type: none"> Standardized Assessment Test School Records: documenting testing within the previous 6-month period prior to enrollment that includes actual scores from a generally accepted standardized test listed in current federal policy. School issued IEP provided it states the student meets the definition of basic skills deficient. Document must be dated within the previous 6-month period prior to enrollment. <p>REQUIRED: Assessment test results must be entered in the Testing section of the applicable enrollment details in OKJobMatch.</p>
<p>Data Element</p>	<p>Program Requirements</p>	<p>Definitions and Requirements</p>	<p>Acceptable Source Document</p>

<p>Homeless participant, Homeless Children and Youth, or Runaway Youth at Program Entry (WIOA)</p>	<p>Wagner-Peyser WIOA Adults WIOA Dislocated Worker WIOA Youth Dislocated Worker Grants NFJP</p>	<p>An Individual who:</p> <p>a) Lacks a fixed, regular, and adequate nighttime residence; which includes an individual who:</p> <ul style="list-style-type: none"> • Is sharing the housing of other persons due to loss of housing, economic hardship, or a similar reason; • Is living in a motel, hotel, trailer park, or campground due to a lack of alternative adequate accommodations; • Is living in an emergency or transitional shelter; • Is abandoned in a hospital; or • Is awaiting foster care placement; <p>b) Has a primary nighttime residence that is a public or private place not designed for or ordinarily used as a regular sleeping accommodation for human beings, such as a car, park, abandoned building, bus or train station, airport, or camping ground;</p> <p>c) Is a migratory child who in the preceding 36 months was required to move from one school district to another due to changes in the parent’s or parent’s spouse’s seasonal employment in agriculture, dairy, or fishing work; or</p> <p>d) Is under 18 years of age and absents himself or herself from home or place of legal residence without the permission of his or her family (i.e., runaway youth).</p> <p>*This definition DOES NOT include a participant imprisoned, detained, or sleeping in a temporary accommodation while away from home.</p>	<p>SUPPORTING</p> <p>Required</p> <ul style="list-style-type: none"> • Participant self-attestation <p><u>Youth Eligibility Verification, Career Service & Training Service Requirements</u></p> <ul style="list-style-type: none"> • Participant self-attestation • Written statement from an individual providing temporary residence • Written statement from Shelter • Written statement from Social Service Agency • Detailed Case Notes
<p>Data Element</p>	<p>Program Requirements</p>	<p>Definitions and Requirements</p>	<p>Acceptable Source Document</p>

Pregnant or Parenting Youth	WIOA Youth NFJP	<p>A Youth who is pregnant, or an individual (male or female) who is providing custodial care to one or more dependents under age 18.</p> <p>*Males do not qualify as a parenting youth until the child is born.</p>	<p>SUPPORTING</p> <p>Required</p> <ul style="list-style-type: none"> Participant self-attestation <p><u>Youth Eligibility Verification</u></p> <ul style="list-style-type: none"> Participant self-attestation Child’s Birth Certificate Baptismal Record Physician’s Statement Confirming Pregnancy Detailed Case Note with Observation of pregnancy status Paternity Verification Public Assistance Verification verifying child in Individual’s Case.
Ex-Offender Status at Program Entry (WIOA)	Wagner-Peyser WIOA Adults WIOA Dislocated Worker WIOA Youth Dislocated Worker Grants NFJP	<p>An Individual at program entry who either:</p> <ol style="list-style-type: none"> Has been subject to any stage of the criminal justice process for committing a status offense or delinquent act, or Requires assistance in overcoming barriers to employment resulting from a record of arrest or conviction. <p>*A status offense is the illegal behavior of a child (under the age of 18 years old), that if committed by an adult would not be considered a criminal activity, such as truancy, possession and/or consumption of alcohol, curfew violations, and purchase of cigarettes.</p>	<p>SUPPORTING</p> <p>Required</p> <ul style="list-style-type: none"> Participant self-attestation <p><u>Youth Eligibility Verification, Career Service & Training Service Requirement</u></p> <ul style="list-style-type: none"> Participant self-attestation Documents from the Juvenile/Criminal Justice System Court Documents Letter of Parole Letter from Probation Officer Police Records Detailed Case Notes of phone call with court or probation representatives
Data Element	Program Requirements	Definitions and Requirements	Acceptable Source Document

Youth Who Needs Additional Assistance	WIOA Youth NFJP	<p>A Youth who requires additional assistance to enter or complete an educational program, or to secure and hold employment. Defined by the State as a low income youth meeting at least one of the following criteria:</p> <ul style="list-style-type: none"> • With a parent or legal guardian that is currently or previously incarcerated for a felony conviction; • With a parent or legal guardian who lacks a high school diploma or GED; or • Who attends or has attended chronically under performing schools listed as a Priority School/Targeted Intervention School on the State Department of Education website; or • Between 18-24 years of age with a pattern of Poor Work History. Poor work history includes non-reoccurring employment income or sporadic employment. <p>*low-income includes a youth that lives in a high-poverty area.</p>	<p>SUPPORTING</p> <p>Required</p> <ul style="list-style-type: none"> • Participant self-attestation <p>Youth Eligibility Verification</p> <ul style="list-style-type: none"> • Participant self-attestation • Individual Service Strategy • Detailed Case Notes documenting Parent or Guardian Status • School Records verifying Attendance at Targeted or Focus Designation School
Other Significant Barrier to Employment	Wagner-Peyser	Identify if the individual has a significant barrier to employment not captured elsewhere.	<p>Required</p> <ul style="list-style-type: none"> • Participant self-attestation
Exhausting TANF Within 2 Years (Part A Title IV of the Social Security Act) at Program Entry (WIOA)	Wagner-Peyser WIOA Adults WIOA Dislocated Worker WIOA Youth Dislocated Worker Grants	An individual, at program entry, is within 2 years of exhausting lifetime eligibility under part A of Title IV of the Social Security Act (42 U.S.C. 601 et seq.), regardless of whether they are receiving these benefits at program entry.	<p>Required</p> <ul style="list-style-type: none"> • Participant self-attestation
Data Element	Program Requirements	Definitions and Requirements	Acceptable Source Document

Foster Care Youth Status at Program Entry (WIOA)	WIOA Youth NFJP	<p>An individual:</p> <p>(a) In foster care; or</p> <p>(b) Who has aged out of the foster care system; or</p> <p>(c) Who has attained 16 years of age and left foster care for kinship guardianship or adoption;</p> <p>(d) A child eligible for assistance under sec. 477 of the Social Security Act (42 U.S.C. 677); or</p> <p>(e) In an out-of-home placement.</p>	<p>SUPPORTING</p> <p>Required</p> <ul style="list-style-type: none"> Participant self-attestation <p><u>Youth Eligibility Verification</u></p> <ul style="list-style-type: none"> Participant self-attestation (*required) Social Service Verification Court Documentation Verification of Payments made on behalf of the Child Written Statement from State or Local Agency Detailed Case Notes
Service Delivery			
Data Element	Program Requirement	Definitions and Requirements	Acceptable Source Document

<p>Date of Program Entry (WIOA)</p>	<p>Wagner-Peyser WIOA Adults WIOA Dislocated Worker WIOA Youth Dislocated Worker Grants TAA NFJP</p>	<p>The date on which an individual became a participant after satisfying applicable programmatic requirements for the provision of services.</p> <p>For WIOA Title I Adult, Dislocated Worker, and Title III Employment Services programs, a participant is a reportable individual who has satisfied all applicable program requirements such as eligibility determination and who has received a service(s) other than a self-service or information only service or activity. For a list of services that establish participation, reference the Core Performance Measures OWDI.</p> <p>For Title I Youth, a participant is a reportable individual who has satisfied all applicable program requirements for the provision of services, including eligibility determination, an objective assessment, and development of an individual service strategy, and received one or more of the 14 WIOA Youth program elements.</p> <p>The date of program entry is the actual start date of the first qualifying service.</p>	<p>Required</p> <ul style="list-style-type: none"> • Service and Training Plan entry
<p>Data Element</p>	<p>Program Requirement</p>	<p>Definitions and Requirements</p>	<p>Acceptable Source Document</p>

Date of First Basic Career Service	Reportable Individual Wagner-Peyser WIOA Adults WIOA Dislocated Worker WIOA Youth Dislocated Worker Grants	<p>The date on which an individual received the first basic career service that is not provided via self-service or information-only services and activities.</p> <p>For a list of Basic Career Services, reference the Services list in the Core Performance Measures OWDI.</p> <p>The date of the first Basic Career Service is the actual start date of the first applicable service.</p>	<p>Required</p> <ul style="list-style-type: none"> • Service and Training Plan entry
Date of First Individualized Career Service	Wagner-Peyser WIOA Adults WIOA Dislocated Worker Dislocated Worker Grants TAA NFJP	<p>The date on which the participant received the first individualized career services on or after the date of participation.</p> <p>For a list of Individualized Career Services, reference the Services list in the Core Performance Measures OWDI.</p> <p>The date of the first Individualized Career Service is the actual start date of the first applicable service.</p>	<p>Required</p> <ul style="list-style-type: none"> • Service and Training Plan entry
Date Individual Employment Plan Created	WIOA Adults WIOA Dislocated Worker	<p>The date on which the participant’s Individual Employment Plan (IEP) was created or established to identify the participant’s employment goals, their appropriate achievement objectives, and the appropriate combination of services to achieve the employment goals.</p> <p>At a minimum, an IEP must include a comprehensive assessment, an employment goal, documentation of identified needs and barriers, and a signed Client Involvement Statement. Additional goals and services necessary for the attainment and retention of successful employment must be added to the IEP as they are identified.</p>	<p>Required</p> <ul style="list-style-type: none"> • Individual Employment Plan in applicable Program enrollment • Service and Training Plan entry • Locally developed IEP • Client Involvement Statement – Attachment B or Virtual IEP Client Involvement Statement • Comprehensive Assessment Documentation <p>The virtual IEP available in OKJobMatch may be utilized in the applicable program enrollment or a locally developed form may be used. All documentation related to the IEP must be easily accessible for monitoring purposes and all uploaded documentation must be clearly labeled in OKJobMatch.</p>
Data Element	Program Requirement	Definitions and Requirements	Acceptable Source Document

Individual Training Account (ITA)	WIOA Adults WIOA Dislocated Worker	<p>Individual Training Accounts (ITA) are the primary method to be used for procuring training services. Training services must be provided in a manner that maximized the individual's choice in the selection of a training provider.</p> <p>Staff must ensure that the Individual Training Account is completed in coordination with the participant utilizing the ITA agreement, ITA voucher, and Coordination of Training Fund (CoTF) forms.</p> <p>ITA's may be utilized for OSY, ages 16-24 using WIOA youth funds when appropriate and they must utilize the Eligible Training Provider List (ETPL). ISY ages 18 or older may access ITAs through the Adult program.</p>	<p>Required</p> <ul style="list-style-type: none"> • ITA Agreement – Attachment C • ITA Voucher – Attachment D • CoTF - Attachment E • LWDB required Documentation • The ITA issuance, issuance date, ITA amount, any grant or financial aid such as Pell grant, Federal grant, State aid, Institutional aid, or Employer-Funded financial aid, must be documented in the Educational Grants section of OKJobMatch in the applicable program Enrollment.
Training Contracts	WIOA Adults WIOA Dislocated Worker	<p>In certain circumstances a contract for training services may be developed instead of an ITA. Reference State guidance for the list of applicable circumstances for using training contracts.</p>	<p>Required</p> <ul style="list-style-type: none"> • Training Contract • LWDB required Documentation
Individual Service Strategy	WIOA Youth	<p>The participant must be involved in the design and implementation of services during the creation of the Individual Service Strategy (ISS). Must:</p> <ul style="list-style-type: none"> • Be based on the needs of the participant. • Be directly linked to one or more of the performance indicators. • Identify career pathways that include education and employment goals. • Consider career planning • Include the results of the objective assessment • Prescribe achievement objectives and services for the participant. 	<p>Required</p> <ul style="list-style-type: none"> • Virtual Individual Service Strategy in applicable Program enrollment • Service and Training Plan entry • Locally developed ISS • Client Involvement Statement – Attachment B or Virtual Client Involvement Statement <p>The virtual ISS available in OKJobMatch may be utilized in the applicable program enrollment or a locally developed form may be used. All documentation related to the ISS must be easily accessible for monitoring purposes and all uploaded documentation must be clearly labeled in OKJobMatch.</p>
Data Element	Program Requirement	Definitions and Requirements	Acceptable Source Document

<p>Enrolled in Secondary Education Program (WIOA)</p>	<p>WIOA Adults WIOA Dislocated Worker WIOA Youth Dislocated Worker Grants TAA NFJP</p>	<p>If a participant is enrolled in a Secondary Education Program at or above the 9th Grade level.</p> <p>A Secondary Education Program includes both secondary school and enrollment in a program of study with instruction designed to lead to a high school equivalent credential. Examples may include adult high school credit programs and programs designed to prepare participants to pass recognized high school equivalency exams such as the GED, HiSet, or TASC.</p> <p>Programs of study designed to teach English proficiency skills or literacy skills below the 9th grade equivalent are not considered Secondary Education Programs.</p> <p>States may use this if the participant was either already enrolled in education or training at the time of application to the program or became enrolled in an education or training program at or above the 9th Grade level at any point while participating in the program.</p>	
<p>Data Element</p>	<p>Program Requirement</p>	<p>Definitions and Requirements</p>	<p>Acceptable Source Document</p>

<p>Most Recent Date Received Supportive Services</p>	<p>WIOA Adults WIOA Dislocated Worker WIOA Youth Dislocated Worker Grants</p>	<p>Supportive services include, but are not limited to, assistance with transportation, child care, dependent care, and housing that are necessary to enable the participant to participate in programs which provide career and training services.</p> <p>Support services for Youth participants must be appropriate to the needs of the individual and defined in their individual Service Strategy which may include:</p> <ol style="list-style-type: none"> a) Linkages to community services b) Assistance with transportation c) Assistance with child care and dependent care d) Assistance with housing e) Needs-related payments f) Assistance with educational testing g) Reasonable accommodations for youth with disabilities h) Referrals to healthcare i) Assistance with uniforms or other appropriate work attire and work-related tools, including such items as eye glasses and protective eye gear j) Assistance with books, fees, school supplies, and other necessary items for students enrolled in postsecondary education classes; and k) Payments and fees for employment and training-related applications, test, and certifications. 	<p>Required</p> <ul style="list-style-type: none"> • Service and Training Plan entry – Supportive Service • Supportive Service Request/Voucher • Verification that No Other Sources Are Available • LWDB required documentation
<p>Data Element</p>	<p>Program Requirement</p>	<p>Definitions and Requirements</p>	<p>Acceptable Source Document</p>

Received Needs-Related Payments	WIOA Adults WIOA Dislocated Worker Dislocated Worker Grants TAA	Needs-related payments provided to a participant with financial assistance for the purpose of enabling them to participant in training services. A participant must be enrolled in a training program in order to receive needs-related payments.	Required <ul style="list-style-type: none"> • Training Service documented in the Program Service & Training Plan • Voucher, Purchase Order, Invoice, & Receipts • LWDB Required Documentation
Type of Work Experience	Wagner-Peyser WIOA Adults WIOA Dislocated Worker WIOA Youth Dislocated Worker Grants NFJP	An individual who received work experience: <ul style="list-style-type: none"> a) Summer Employment/ Internship (WIOA Youth). b) Internship/Employment Opportunity. c) Pre-apprenticeship program d) Job Shadowing. e) On-The-Job Training (WIOA Youth). f) Transitional Job (WIOA Adult, Dislocated Worker, and Dislocated Worker Grants). g) Work experience. <p>The type of work experience is recorded as the type of service entered into the Service and Training Plan</p> <p>NOTE: If Internship/Employment Opportunities or On-The-Job Training are part of a Pre-Apprenticeship program, use the Pre-Apprenticeship Service.</p>	Required <ul style="list-style-type: none"> • Service and Training Plan entry • Detailed Program note • State and Local policy documentation requirements
Date Entered Training (WIOA)	WIOA Adults WIOA Dislocated Worker WIOA Youth Dislocated Worker Grants TAA NFJP	The date on which the participant’s training service actually began. The date entered training is recorded as the actual start date of the first applicable training service.	Required <ul style="list-style-type: none"> • Documentation of need for training • Service and Training Plan entry • Detailed Program note
Data Element	Program Requirement	Definitions and Requirements	Acceptable Source Document

<p>Type of Training Service (WIOA)</p>	<p>WIOA Adults WIOA Dislocated Worker WIOA Youth Dislocated Worker Grants TAA NFJP</p>	<p>The date on which the participant’s training service actually began. WIOA requires the following type of training services provided to a participant to be reported.</p> <ul style="list-style-type: none"> a) On the Job Training b) Skill Upgrading c) Entrepreneurial Training d) ABE or ESL in conjunction with Training (non-TAA funded) e) Customized Training f) Other occupational Skills Training g) Remedial Training (ABE/ESL – TAA only) h) Prerequisite Training i) Registered Apprenticeship Training j) Youth Occupational Skills Training k) Other Non-Occupational Skills Training <p>The type of training is recorded as the type of service entered into the Service and Training Plan. For a list of Training service by program, reference the Service List in the Core Measures OWDI.</p>	<p>Required</p> <ul style="list-style-type: none"> • Documentation of need for training • Service and Training Plan entry • Detailed Program note • State and Local policy documentation requirements
<p>Participated in Postsecondary Education During Program Participation (WIOA)</p>	<p>WIOA Adults WIOA Dislocated Worker WIOA Youth Dislocated Worker Grants TAA NFJP</p>	<p>When a participant is in a postsecondary education program that leads to a credential or degree from an accredited postsecondary education institution at any point during program participation.</p> <p>This data element relates to the credential indicator denominator and those who are recorded as 1 are included in the credential rate denominator.</p>	<p>Required</p> <ul style="list-style-type: none"> • Service and Training Plan entry
<p>Data Element</p>	<p>Program Requirement</p>	<p>Definitions and Requirements</p>	<p>Acceptable Source Document</p>

Date of First WIOA Youth Service	WIOA Youth	<p>The date on which the participant began receiving his/her first service funded by the WIOA Youth program following a determination of eligibility to participate in the program.</p> <p>The date of the first Youth service is the actual start date of the first qualifying service. (i.e. objective assessment or individual service strategy).</p>	<p>Required</p> <ul style="list-style-type: none"> • Service and Training Plan entry
Most Recent Date Received Educational Achievement Services	WIOA Youth	<p>Educational Achievement services include, but are not limited to tutoring, study skills training, instruction, and evidence-based dropout prevention and recovery strategies that lead to completion of the requirements for a secondary school diploma or its recognized equivalent (including a recognized certificate of attendance or similar document for individuals with disabilities) or for a recognized postsecondary credential.</p>	<p>Required</p> <ul style="list-style-type: none"> • Service and Training Plan entry – <i>Tutoring, Study Skills Training, Instruction, and Dropout Prevention</i>
Data Element	Program Requirement	Definitions and Requirements	Acceptable Source Document

<p>Most Recent Date Received Alternative Secondary School Services</p>	<p>WIOA Youth</p>	<p>Alternative Secondary School services include Alternative Secondary School Offering and Dropout Recovery Services. These services are provided with the goal of helping youth to re-engage and persist in education that leads to the completion of a recognized high school equivalent attainment.</p> <p>Alternative Secondary School Services are those services that assist youth who have struggled in traditional secondary education that include, but are not limited to services such as basic education skills training, individualized academic instruction, and English as a Second language training.</p> <p>Dropout Recover Services are those that assist youth who have dropped out of school and focus on getting them back into a secondary school or alternative school include, but are not limited to credit recovery, counseling, and educational plan development.</p>	<p>Required</p> <ul style="list-style-type: none"> • Service and Training Plan entry – <i>Alternative Secondary School Offerings or Dropout Recovery Services</i>
<p>Most Recent Date Received Work Experience Opportunities</p>	<p>WIOA Youth</p>	<p>Work experience opportunities that have academic and occupational education as a component. Work experiences are a planned, structured learning experience that takes place in a workplace for a limited period of time. Work experiences include:</p> <ul style="list-style-type: none"> (a) Summer employment opportunities (b) Employment opportunities throughout the school year (c) Pre-apprenticeship programs (d) Internships (e) Job shadowing (f) On-the-job training 	<p>Required</p> <ul style="list-style-type: none"> • Applicable Service and Training Plan entry: <ul style="list-style-type: none"> ○ Work Experience ○ Internships/Employment Opportunities ○ Job Shadowing ○ On-the-Job Training ○ Summer Employment/Internships ○ Pre-apprenticeship Program
<p>Data Element</p>	<p>Program Requirement</p>	<p>Definitions and Requirements</p>	<p>Acceptable Source Document</p>

Most Recent Date Received Education Offered Concurrently with Workforce Preparation	WIOA Youth	<p>Education services offered concurrently with and in the same context as workforce preparation activities and training for a specific occupation or occupational cluster.</p> <p>For example, a program developing basic academic skills, which are included as part of alternative secondary school services and dropout recovery services, workforce preparation activities that occur as part of a work experience, and occupational skills training would make up an integrated education and training model.</p>	<p>Required</p> <ul style="list-style-type: none"> • Service and Training Plan entry – Concurrent Education, Training, & Workforce Preparation
Most Recent Date Received Leadership Development Opportunities	WIOA Youth	<p>Leadership development opportunities are services that encourage responsibility, confidence, employability, self-determination, and other positive social behaviors that may include, but are not limited to services such as, exposure to postsecondary educational possibilities, community and service learning projects, peer mentoring, training in decision-making, life skills training, and civic engagement activities.</p>	<p>Required</p> <ul style="list-style-type: none"> • Service and Training Plan entry – <i>Leadership Development Opportunities</i>
Most Recent Date Received Adult Mentoring Services	WIOA Youth	<p>Adult mentoring service may last for at least twelve months and may occur both during and after program participation and be a formal relationship between a youth participant and an adult mentor that includes structured activities where the mentor offers guidance, support, and encouragement to develop the competence and character of the mentee.</p>	<p>Required</p> <ul style="list-style-type: none"> • Service and Training Plan entry – Adult mentoring
Data Element	Program Requirement	Definitions and Requirements	Acceptable Source Document

Most Recent Date Received Comprehensive Guidance/ Counseling Services	WIOA Youth	Comprehensive guidance and counseling services which may include drug and alcohol abuse counseling, mental health counseling, and referral to partner programs, as appropriate.	Required <ul style="list-style-type: none"> • Service and Training Plan entry – Comprehensive Guidance and Counseling
Most Recent Date Received Youth Follow-up Services	WIOA Youth	<p>Youth follow-up services are services the youth participant received after exiting the program. Follow-up services for youth participants are described as:</p> <ol style="list-style-type: none"> a) Critical services provided following a youth’s exit from the program to help ensure the youth is successful in employment and/or postsecondary education and training. Follow-up may include regular contact with a youth participant’s employer, including assistance in addressing work-related problems that arise. b) Services for youth may also include the following program elements: <ol style="list-style-type: none"> i. Supportive services ii. Adult mentoring iii. Financial literacy education iv. Services that provide labor market and employment information about in-demand industry sectors or occupations available in the local area, such as career awareness, career counseling, and career exploration services; and v. Activities that help youth prepare for and transition to postsecondary education and training. c) Services that align with their Individual Service Strategies. Furthermore, follow-up services must be provided to all participants for a minimum of 12 months unless the participant declines to receive follow-up services or the participant cannot be located or contacted. 	Required <ul style="list-style-type: none"> • Service and Training Plan entry – Follow-up Services
Data Element	Program Requirement	Definitions and Requirements	Acceptable Source Document

Most Recent Date Youth Received Entrepreneurial Skills Training	WIOA Youth	Entrepreneurial Skills Training provides the basics of starting and operating a small business. Such training must develop the skills associated with entrepreneurship and may include, but are not limited to the ability to: take initiative, creatively seek out and identify business opportunities, develop budgets and forecast resource needs, understand various options for acquiring capital and the trade-offs associated with each option, and communicate effectively and market oneself and one's ideas.	Required <ul style="list-style-type: none"> • Service and Training Plan entry – Entrepreneurial Training
Most Recent Date Youth Received Services that provide labor market information and employment information	WIOA Youth	Services that provide labor market and employment information about in-demand industry sectors or occupations available in the local area, such as career awareness, career counseling, and career exploration services.	Required <ul style="list-style-type: none"> • Service and Training Plan entry – Labor Market Information Or <ul style="list-style-type: none"> • Service and Training Plan entry – Career Guidance
Most Recent Date Youth Received Postsecondary transition and preparatory activities	WIOA Youth	Activities that helped them to prepare for and transition to postsecondary education and training. Services include exploring postsecondary education options including technical training schools, community colleges, 4-year colleges and universities, and registered apprenticeship. Additional services include but are not limited to assisting youth to prepare for SAT/ACT testing; assisting with college admission applications; searching and applying for scholarships and grants; filling out the proper Financial Aid applications and adhering to changing guidelines, and connecting youth to postsecondary education programs.	Required <ul style="list-style-type: none"> • Service and Training Plan entry – Postsecondary Preparation and Transition Activities
Data Element	Program Requirement	Definitions and Requirements	Acceptable Source Document

<p>Date of Program Exit (WIOA)</p>	<p>Wagner-Peyser WIOA Adults WIOA Dislocated Worker WIOA Youth Dislocated Worker Grants TAA NFJP</p>	<p>The date of program exit is the last date the participant received services (excluding self-service, information-only service or activities, or follow-up services) for at least 90 days, and no future services are planned.</p> <p>The date of program exit is the actual end date of the last qualifying service.</p>	<p>Required</p> <ul style="list-style-type: none"> • Service and Training Plan entry
<p>Other Reasons for Exit (WIOA)</p>	<p>Wagner-Peyser WIOA Adults WIOA Dislocated Worker WIOA Youth Dislocated Worker Grants TAA NFJP</p>	<p>If the Participant exits the program and is unable to continue to receive program services due to any of the following reasons:</p> <ul style="list-style-type: none"> • The participant has become incarcerated in a correctional institution or has become a resident of an institution or facility providing 24-hour support such as a hospital or treatment center during the course of receiving services as a participant. • The participant must undergo medical treatment and that treatment is expected to last longer than 90 days and precludes entry into unsubsidized employment or continued participation in the program. • The participant is deceased. • The participant is a member of the national Guard or other reserve military unit of the armed forces and is called to active duty for at least 90 days. • YOUTH ONLY: The participant is in the foster care system and has moved from the area as part of such a program or system. • VR ONLY: The participant who was determined to be eligible, is later determined not to have met eligibility criteria. • The participant is a criminal offender in a correctional institution under section 225 of WIOA 	<p>SUPPORTING</p> <ul style="list-style-type: none"> • Detailed Program note • Court Documents • Physician’s Statement • Institution or facility Documentation • Death Certificate • Social Service Verification • Military Orders • Written Statement from State or Local Agency <p>REQUIRED: Staff must enter the reason for Exit in the applicable Program Exit Questions section of OKJobMatch and provide detailed program note.</p>
<p>Data Element</p>	<p>Program Requirement</p>	<p>Definitions and Requirements</p>	<p>Acceptable Source Document</p>

School Status at Exit	WIOA Youth NFJP	<p>At program exit, school status must be recorded as follows:</p> <p>a) In-school, secondary school or less: If the participant has not received a secondary school diploma or its recognized equivalent and is attending any secondary school (including elementary, intermediate, junior high school, whether full or part-time), or is between school terms and intends to return to school.</p> <p>b) In-school, Alternative school: If the participant has not received a secondary school diploma or its recognized equivalent and is attending an alternative secondary school or an alternative course of study approved by the local educational agency whether full or part-time.</p> <p>c) In-school, Postsecondary school: If the participant has received a secondary school diploma or its recognized equivalent and is attending a postsecondary school or program (whether full or part-time, or is between school terms and intends to return to school).</p> <p>d) Not attending school or Secondary School Dropout: If the participant is no longer attending any school and has not received a secondary school diploma or its recognized equivalent.</p> <p>e) Not attending school: Secondary School Graduate or has a Recognized Equivalent: If the participant is not attending any school and has either graduated from secondary school or holds an equivalency.</p> <p>f) Not attending school; within age of compulsory school attendance: If the participant is within the age of compulsory school attendance but has not attended school for at least the most recent complete school year calendar quarter and has not received a secondary school diploma or its recognized equivalent.</p>	<p>Required</p> <ul style="list-style-type: none"> • Completion of Exit Questions in applicable program enrollment <p>REQUIRED: Staff must ensure that school status at exit is entered into the applicable Program Outcomes in OKJobMatch as soon as they receive notification of attainment.</p>
Performance Accountability			
Data Element	Program Requirement	Definitions and Requirements	Acceptable Source Document

Date Enrolled in Post Exit Education or Training Program Leading to a Recognized Postsecondary Credential (WIOA)	WIOA Adults WIOA Dislocated Worker WIOA Youth Dislocated Worker Grants TAA NFJP	Record the date the participant is enrolled in an education or training program that leads to a recognized postsecondary credential after program exit. Leave blank if this data element does not apply to the participant. NOTE: This element only applies to participants who exited secondary education and obtained a secondary school diploma or its equivalency per Sec. 116(b)(2)(A)(iii). This data element applies to the Credential Rate indicator.	
Youth 2nd and 4th Quarter Placement (Title I) (WIOA)	WIOA Youth NFJP	Record if the participant was enrolled in the following for the 2nd and 4th Quarter after Exit: a) Occupational Skills Training b) Postsecondary Education c) Secondary Education d) Was not placed in any of the above conditions	Required <ul style="list-style-type: none"> • OKJobMatch Outcomes 2nd Quarter • OKJobMatch Outcomes 4th Quarter REQUIRED: Staff must ensure that the placement information for the 2nd and 4th quarter are entered into the Youth Program Enrollment Outcomes in OKJobMatch during following up with the participant.
Type of Employment Quarter After Exit (WIOA)	Wagner-Peyser WIOA Adults WIOA Dislocated Worker WIOA Youth Dislocated Worker Grants TAA NFJP	Identify the type of employment status following exit: a) Unsubsidized Employment b) Subsidized Employment c) Registered Apprenticeship d) Military e) Not employed Requirement Staff must enter the reason for Exit in the applicable Program Exit Question section of OKJobMatch.	SUPPORTING <ul style="list-style-type: none"> • Completion of Exit Questions in applicable program enrollment • Supplemental Data REQUIRED: Staff must enter the reason for Exit in the applicable Program Exit Question section of OKJobMatch.
Data Element	Program Requirement	Definitions and Requirements	Acceptable Source Document

<p>Employment Related to Training (2nd Quarter After Exit) (WIOA)</p>	<p>Wagner-Peyser WIOA Adults WIOA Dislocated Worker WIOA Youth Dislocated Worker Grants TAA NFJP</p>	<p>Record if the participant received training services and obtained employment directly related to the training services they received.</p>	<p>SUPPORTING</p> <ul style="list-style-type: none"> • Completion of Exit Questions in applicable program enrollment • Supplemental Data <p>REQUIRED: Staff must enter the reason for Exit in the applicable Program Exit Question section of OKJobMatch.</p>
<p>Entered Non-Traditional Employment</p>	<p>WIOA Adults WIOA Dislocated Worker WIOA Youth NFJP</p>	<p>Non-traditional employment is when the participant's employment is an occupation or field of work for which individuals of the participant's gender comprise less than 25% of the individuals employed in such occupation or field of work.</p> <p>Non-traditional employment can be based on either local or national data, and both males and females can be in non-traditional employment. This information can be based on any job held after exit and only applies to adults, dislocated workers and youth who entered employment in the second quarter after the exit quarter.</p>	<p>SUPPORTING</p> <ul style="list-style-type: none"> • Completion of Exit Questions in applicable program enrollment • Supplemental Data <p>REQUIRED: Staff must enter the reason for Exit in the applicable Program Exit Question section of OKJobMatch.</p>
<p>Data Element</p>	<p>Program Requirement</p>	<p>Definitions and Requirements</p>	<p>Acceptable Source Document</p>

Documentation of Pre-Test and Post-Test Assessments	WIOA Adults WIOA Dislocated Worker WIOA Youth Dislocated Worker Grants TAA NFJP	Documentation of Assessment: a) Category of Assessment i. Adult Basic Education (ABE); or ii. English-As-A-Second Language (ESL) b) Date of Pre-assessment test c) Pre-Test Score: i. Raw scale score d) Pre-Test Educational Functioning Level (EFL) i. Beginning ABE Literacy ii. Beginning Basic Education iii. Low Intermediate Basic Education iv. High Intermediate Basic Education v. Low Adult Secondary Education vi. High Adult Secondary Education vii. Beginning ESL Literacy viii. Low Beginning ESL ix. High Beginning ESL x. Low Intermediate ESL xi. High Intermediate ESL xii. Advanced ESL e) Date of Post-Assessment Test f) Post-Test Score g) Post-Test Educational Functioning Level (EFL)	<p>Required</p> <ul style="list-style-type: none"> • Applicable Program Enrollment Testing Section <ul style="list-style-type: none"> ○ Pre-Test Score ○ Post-Test Score <p>SUPPORTING SOURCE DOCUMENTATION</p> <ul style="list-style-type: none"> • Testing Scores <p>REQUIRED: Staff must ensure that participants Pre-test and Post-test scores are recorded in the Testing Section in the applicable Program Enrollment of OKJobMatch.</p>
Data Element	Program Requirement	Definitions and Requirements	Acceptable Source Document

<p>Type of Recognized Credential / Date of Attainment (WIOA)</p>	<p>Wagner-Peyser WIOA Adults WIOA Dislocated Worker WIOA Youth Dislocated Worker Grants TAA NFJP</p>	<p>The type of recognized diploma, degree, or credential consisting of an industry-recognized certificate or certification that is attained either during participation or within one year of exit:</p> <ul style="list-style-type: none"> a) Secondary School Diploma/or equivalent b) AA or AS Diploma/Degree c) BA or BS Diploma/Degree d) Occupational Licensure e) Occupational certificate f) Occupational Certification g) Other Recognized Diploma, Degree, or Certificate 	<p>Required</p> <ul style="list-style-type: none"> • Applicable Program Outcome entry <p>SUPPORTING SOURCE DOCUMENTATION</p> <ul style="list-style-type: none"> • Transcript • Certificate • Diploma • Licensure <p>REQUIRED: Staff must ensure that attained recognized credentials are entered into the applicable Program Outcomes in OKJobMatch as soon as they receive notification of attainment. A detailed Program Note and/or an Update to the participants virtual or uploaded IEP/ISS must be entered in the applicable program enrollment.</p> <p>The date of attainment must match date on source documentation.</p>
<p>Data Element</p>	<p>Program Requirement</p>	<p>Definitions and Requirements</p>	<p>Acceptable Source Document</p>

<p>Date of Most Recent Measurable Skill Gains (MSG): Educational Functioning Level (EFL) (WIOA)</p>	<p>WIOA Adults WIOA Dislocated Worker WIOA Youth Dislocated Worker Grants TAA NFJP</p>	<p>Title I Adults & Dislocated Workers:</p> <ul style="list-style-type: none"> All participants who are receiving instruction below the postsecondary education level and achieves at least one documented educational functioning level measurable skill gain. <p>Title I Youth:</p> <ul style="list-style-type: none"> In-School Youth: All in-school youth that achieves at least one documented educational functioning level measurable skill gain. Out-of-School Youth: Out of school who are receiving instruction below the postsecondary education level, are receiving an Occupational Skills Training, Title II funded adult education service, Youthbuild service, or Job Corps service during participation in the Title I Youth program, and achieves at least one documented educational functioning level measurable skill gain. <p>An educational functioning level measurable skill gain may be achieved and documented in one of three ways:</p> <ol style="list-style-type: none"> Comparing a participant’s initial EFL as measured by a pre-test with the participant’s EFL as measured by a participant’s post-test; or For States that offer secondary school programs that lead to a secondary school diploma or its recognized equivalent, an EFL gain may be measured through the awarding of credits or Carnegie units; or States may report and EFL gain for participants who exit the program and enroll in postsecondary education or training during the program year. 	<p>Required</p> <ul style="list-style-type: none"> Service & Training Plan <ul style="list-style-type: none"> Training that leads to a credential Measurable Skill Gain – Educational Functioning Level Testing <ul style="list-style-type: none"> Pre-Test Score Post-Test Score <p>SUPPORTING SOURCE DOCUMENTATION</p> <ul style="list-style-type: none"> Testing Scores <p>Staff must ensure that demographic information (school status and English language learner or basic skills deficient/low levels of literacy) is entered correctly during the eligibility process and that a program service that leads to a credential is entered into Service and Training Plan in the applicable program enrollment in OKJobMatch.</p> <p>Staff must ensure that participants Pre-test and Post-test scores are recorded in the Testing Section in applicable program enrollment of OKJobMatch.</p> <p>Staff must ensure that an Educational Functioning Level MSG is entered into the Measurable Skills Gain screen in the applicable program enrollment in OKJobMatch.</p>
Data Element	Program Requirement	Definitions and Requirements	Acceptable Source Document
<p>Date of Most Recent</p>	<p>WIOA Adults WIOA Dislocated</p>	<p>Title I Adults & Dislocated Workers:</p>	<p>Required</p> <ul style="list-style-type: none"> Service & Training Plan

<p>Measurable Skill Gains: Postsecondary Transcript/Report Card (WIOA)</p>	<p>Worker WIOA Youth Dislocated Worker Grants TAA NFJP</p>	<ul style="list-style-type: none"> All participants who are in an education or training program that leads to a recognized postsecondary credential or employment and achieves a documented postsecondary transcript/report card measurable skill gain. <p>Title I Youth:</p> <ul style="list-style-type: none"> In-School Youth: All in-school youth that who achieve a documented postsecondary transcript/report card measurable skill gain. Out-of-School Youth: Out of school who are receiving an Occupational Skills Training, Title II funded adult education service, Youthbuild service, or Job Corps service during participation in the Title I Youth program, and achieve a documented postsecondary transcript/report card measurable skill gain. <p>A postsecondary transcript/report card measurable skill gain may be achieved and documented by one of the following ways:</p> <ol style="list-style-type: none"> The participant’s transcript or report card from a postsecondary education institution demonstrating a minimum of 12 hours per semester, that shows the participant is meeting Oklahoma’s academic standards, or For part time students, the participant’s transcript or report card from a postsecondary education institution demonstrating a total of at least 12 credit hours over the course of two completed semesters during the same 12-month period, that shows the participant is meeting Oklahoma’s academic standards. 	<ul style="list-style-type: none"> Training that leads to a credential Measurable Skill Gain – Post-Secondary Transcript/Report Card <p>SUPPORTING SOURCE DOCUMENTATION</p> <ul style="list-style-type: none"> Report Card (12 hours) Transcript (12 hours) <p>Staff must ensure that a program service that leads to a credential is entered into Service and Training Plan in the applicable program enrollment in OKJobMatch.</p> <p>Staff must ensure that a Post-Secondary Transcript/Report Card MSG is entered into the Measurable Skills Gain screen in the applicable program enrollment in OKJobMatch.</p>
<p>Data Element</p>	<p>Program Requirement</p>	<p>Definitions and Requirements</p>	<p>Acceptable Source Document</p>

<p>Date of Most Recent Measurable Skill Gains: Secondary Transcript/Report Card (WIOA)</p>	<p>WIOA Adults WIOA Dislocated Worker WIOA Youth Dislocated Worker Grants TAA NFJP</p>	<p>Title I Adults & Dislocated Workers: All participants who are in an education or training program that leads to a recognized postsecondary credential or employment and achieves a documented secondary transcript/report card measurable skill gain.</p> <p>Title I Youth:</p> <ul style="list-style-type: none"> • In-School Youth: All in-school youth who achieve a documented secondary transcript/report card measurable skill gain. • Out-of-School Youth: Out of school who are receiving an Occupational Skills Training, Title II funded adult education service, Youthbuild service, or Job Corps service during participation in the Title I Youth program, and achieve a documented postsecondary transcript/report card measurable skill gain. <p>A secondary transcript/report card measurable skill gain may be achieved and documented by:</p> <ol style="list-style-type: none"> 1. The participant’s transcript or report card for secondary education for one semester showing that the participant is meeting Oklahoma’s academic standards. 	<p>Required</p> <ul style="list-style-type: none"> • Service & Training Plan <ul style="list-style-type: none"> ○ Training that leads to a credential • Measureable Skill Gain – Secondary Transcript/Report Card <p>SUPPORTING SOURCE DOCUMENTATION</p> <ul style="list-style-type: none"> • Report Card (semester) • Transcript (semester) <p>Staff must ensure that a program service that leads to a credential is entered into Service and Training Plan in the applicable program enrollment in OKJobMatch.</p> <p>Staff must ensure that a Secondary Transcript/Report Card MSG is entered into the Measurable Skills Gain screen in the applicable program enrollment in OKJobMatch.</p>
<p>Data Element</p>	<p>Program Requirement</p>	<p>Definitions and Requirements</p>	<p>Acceptable Source Document</p>

<p>Date of Most Recent Measurable Skill Gains: Training Milestone (WIOA)</p>	<p>WIOA Adults WIOA Dislocated Worker WIOA Youth Dislocated Worker Grants TAA NFJP</p>	<p>Title I Adults & Dislocated Workers: All participants who are in an education or training program that leads to a recognized postsecondary credential or employment and achieves a documented training milestone measurable skill gain.</p> <p>Title I Youth:</p> <ul style="list-style-type: none"> • In-School Youth: All in-school youth who achieve a documented training milestone measurable skill gain. • Out-of-School Youth: Out of school who are receiving an Occupational Skills Training, Title II funded adult education service, Youthbuild service, or Job Corps service during participation in the Title I Youth program and achieve a documented training milestone measurable skill gain. <p>A training milestone measurable skill gain may be achieved and documented by:</p> <ol style="list-style-type: none"> 1. The documentation of a participant’s satisfactory or better progress towards established milestones from and employer/training provider who is providing training (e.g., completion of on-the-job training (OJT), completion of one year of a registered apprenticeship program, etc.). 	<p>Required</p> <ul style="list-style-type: none"> • Service & Training Plan <ul style="list-style-type: none"> ○ Training that leads to a credential • Measureable Skill Gain – Training Milestone <p>SUPPORTING SOURCE DOCUMENTATION</p> <ul style="list-style-type: none"> • Training provider reports • Pay stubs (increase in pay must be from acquired skills or increased performance) • Employer progress report (substantive skill development) • OJT completion verification • Registered Apprenticeship completion verification <p>Staff must ensure that a program service that leads to a credential is entered into Service and Training Plan in the applicable program enrollment in OKJobMatch.</p> <p>Staff must ensure that a Training Milestone MSG is entered into the Measurable Skills Gain screen in the applicable program enrollment in OKJobMatch.</p> <p>Source documentation must document newly acquired skills or increased performance as a result of the training received.</p>
<p>Data Element</p>	<p>Program Requirement</p>	<p>Definitions and Requirements</p>	<p>Acceptable Source Document</p>

<p>Date of Most Recent Measurable Skill Gains: Skills Progression (WIOA)</p>	<p>WIOA Adults WIOA Dislocated Worker WIOA Youth Dislocated Worker Grants TAA NFJP</p>	<p>Title I Adults & Dislocated Workers: All participants who are in an education or training program that leads to a recognized postsecondary credential or employment and achieves a documented skills progression measurable skill gain.</p> <p>Title I Youth:</p> <ul style="list-style-type: none"> • In-School Youth: All in-school youth who achieves a documented skills progression measurable skill gain. • Out-of-School Youth: Out of school who are receiving an Occupational Skills Training, Title II funded adult education service, Youthbuild service, or Job Corps service during participation in the Title I Youth program and achieves a documented skills progression measurable skill gain. <p>A skill progression measurable skill gain may be achieved and documented by:</p> <ol style="list-style-type: none"> 1. The documentation of a participant successfully completing an exam that is required for a particular occupation, or progress in attaining technical or occupational skills as evidenced by trade-related benchmarks such as knowledge-based exams. 	<p>Required</p> <ul style="list-style-type: none"> • Service & Training Plan <ul style="list-style-type: none"> ○ Training that leads to a credential • Measurable Skill Gain – Exam Passage/Skills Progression <p>SUPPORTING SOURCE DOCUMENTATION</p> <ul style="list-style-type: none"> • Exam completion verification <p>Staff must ensure that a program service that leads to a credential is entered into Service and Training Plan in the applicable program enrollment in OKJobMatch.</p> <p>Staff must ensure that a Skill Progression MSG is entered into the Measurable Skills Gain screen in the applicable program enrollment in OKJobMatch.</p>
TAA			
Data Element	Program Requirement	Definitions and Requirements	Acceptable Source Document

Date of First Case Management and Employment Service	TAA	The date on which the participant begins receiving his/her first case management and employment service funded by a program following a determination of eligibility to participate in the program.	Required <ul style="list-style-type: none"> • Service and Training Plan entry
TAA Petition Number	TAA	The petition number of the certification which applies to the participant's group.	MATCH <ul style="list-style-type: none"> • Determination of Eligibility Form • DOLETA Website Verification www.doleta.gov/tradeact • Worker Group Certification • TAA eligibility form issued by State Office or other state
TAA Application Date	TAA	The date on which the individual first applied for Trade Act services/benefits under the applicable certification.	MATCH <ul style="list-style-type: none"> • OESC Form 856
Waiver from Training Requirement	TAA	Reasons for which a waiver from the training requirements was issued to the participant include: 1 = Recall 2 = Marketable Skills 3 = Retirement 4 = Health 5 = Enrollment Unavailable 6 = Training Not Available 0 = No	

WIOA Youth Eligibility Form

Attachment B

IDENTIFYING INFORMATION			
Applicant's Name:	_____	_____	_____
	Last	First	MI
Participant ID:	_____	_____	Application Date: _____

General Eligibility – Verify all of the following criteria.

CRITERIA	IDENTIFY SOURCE DOCUMENT(S)
1. Age / Date of Birth	
2. Citizenship / Eligible to Work	
3. Selective Service Registration ¹	<input type="checkbox"/> N/A – female <input type="checkbox"/> N/A – male under 18

Out of School Youth must be between the ages of 16 and 24, not attending any school, and meet one of the following criteria:

CRITERIA	IDENTIFY SOURCE DOCUMENT(S) (source document must be uploaded)
1. Has a disability	
2. School Dropout	
3. Not attended school for at least the most recent calendar quarter	
4. High school graduate who is low-income and either an English language learner or basic skills deficient.	
5. An offender	
6. Homeless or runaway youth	
7. In foster care or aged out of foster care	
8. Pregnant or parenting	
9. * Low income and requires additional assistance to enter or complete an educational program or to secure or hold employment as defined by the State/	

In Youth must be attending school, not younger than 14 or older than 21, low income, and meet one of the following criteria:

CRITERIA	IDENTIFY SOURCE DOCUMENT(S) (source document must be uploaded)
1. Basic Skills Deficient	
2. English language learner.	
3. 14-21 who is subject to the juvenile or adult justice system.	
4. Homeless or runaway youth	
5. In foster care or aged out of foster care	
6. Pregnant or parenting	
7.. Has a disability	
8. Requires additional assistance to enter or complete an educational program or to secure or hold employment.	

WIOA Youth Support Form

Attachment C

IDENTIFYING INFORMATION

Applicant's Name: _____
 Last First MI
 Participant ID: _____ Application Date: _____

I HAVE HAD LITTLE OR NO INCOME OR I AM A MEMBER OF A FAMILY THAT HAS HAD LITTLE OR NO INCOME FOR THE 6-MONTH PERIOD PRIOR TO APPLICATION.

1. What is your household's monthly grocery bill? _____
 How does your household pay for this expense? _____
2. What are your household's monthly housing expenses (include rent and utilities)? _____
 How does your household pay for this expense? _____
3. What are your household's monthly transportation expenses (car payment, gas, bus, etc.)? _____
 How does your household pay for this expense? _____
4. What is the average monthly cost for clothing and shoes for your household? _____
 How does your household pay for this expense? _____
5. What are your household's monthly entertainment expenses? _____
 How does your household pay for this expense? _____

I LIVE WITH MY PARENTS/GUARDIAN OR OTHER RESPONSIBLE ADULT BUT AM INDEPENDENT BECAUSE:

- I am an orphan or ward of the court or was a ward of the court until I reached the age of 18 (attach documentation).
- I am a veteran of the Armed Forces of the United States (attach documentation).
- I am a graduate or professional student (in college, beyond a bachelor's degree) (attach documentation).
- I am a married individual (attach documentation).
- I have legal dependents other than a spouse (attach documentation).
- I am a student for whom a financial aid administrator made a documented determination of independence (attach documentation).
- I provide more than 50% of my own support (complete questions below).
- I am 18 and not attending secondary school.

1. During this time period, for what items (rent, utilities, food, insurance, clothing, etc.) did your parents pay?
 _____ What is the total approximate cost of these items? _____
2. During this time period, for what items (rent, utilities, food, insurance, clothing, etc.) did you pay?
 _____ What is the total approximate cost of these items? _____
3. What is the approximate percentage of support that you provided?

$$\frac{\text{Total cost of items you paid for:}}{\text{Total cost of all items paid for:}} \times 100 = \text{_____ \%}$$
4. Do you provide more than 50 percent of your own support according to these calculations? Yes No

I ATTEST THAT THE INFORMATION STATED ABOVE IS TRUE AND ACCURATE, AND UNDERSTAND THAT THE ABOVE INFORMATION, IF MISREPRESENTED, OR INCOMPLETE, MAY BE GROUNDS FOR IMMEDIATE TERMINATION FROM THE PROGRAM, REPAYMENT OF ANY FUNDS EXPENDED ON THE PARTICIPANT, AND/OR OTHER PENALTIES AS SPECIFIED BY LAW.

Applicant Signature _____ Date _____ Parent/Guardian or Other Responsible Adult Signature _____ Date _____

Case Manager Signature _____ Date _____

IDENTIFYING INFORMATION

Applicant's Name: _____
Last First MI

Participant ID: _____ Application Date: _____

NOTE: In addition to eligibility items, this form may be used to document other information. Be sure to clearly mark the appropriate reason for using the Telephone Verification – ELIGIBILITY ITEM or OTHER

TELEPHONE VERIFICATION

TELEPHONE VERIFICATION USED FOR: ELIGIBILITY ITEM OTHER (EXPLAIN) _____

SUBJECT TO BE VERIFIED: _____ DATE VERIFIED: _____

AGENCY OR THIRD PARTY RELATIONSHIP: _____

CONTACT NAME: _____ PHONE NUMBER: _____

COMMENTS: _____

CERTIFICATION

I attest that the information recorded by me on this form was obtained through telephone contact on the above date. As indicated by the agent, all information was obtained from data previously determined and recorded in the applicant's records at the agency providing the eligibility verification.

Case Manager Signature Date

WIOA Youth Income Eligibility Form: Part I

Attachment E

IDENTIFYING INFORMATION			
Applicant's Name:	_____	_____	_____
	Last	First	MI
Participant ID:	_____	Application Date:	_____

Income Period – From (6 months prior to application): _____ **To (application date):** _____

NOTE – Family Income Calculation: Complete and attach Part II: Income Calculation, for each family member with earned income during the 6 month income review period. **Documentation of income source(s), family size, and Parts I & II of this form must be in the participant paper case file.**

Family Composition: List each family member. Refer to *WIOA Youth Program Eligibility and Data Validation Policy* for help in determining dependent status of applicant. If applicant lives with parents but claims family size of 1 due to providing more than 50 percent of his/her support, then the appropriate section of Attachment C, WIOA Youth Support Form, must also be completed.

Family Member	Name	Relationship	Date of Birth	Age	Income Source(s)	6-Month Income
1		Self/Applicant				
2						
3						
4						
5						
6						
7						
8						

Income Review	Family Size: _____	Income Limit: <small>* to be taken from 'at or below Poverty Line or 70% LLSIL'</small>	Total 6-Month Income: 6-Month Income X 2: <small>* to be compared to INCOME LIMIT</small>
Certification	I attest that to the best of my knowledge the above information is true and correct.		

Applicant Signature _____	Date _____
Parent/Guardian or Other Responsible Adult Signature (if applicant is under 18) _____	Date _____
Case Manager Signature _____	Date _____

Family income calculations INCLUDE the following:	Family income calculations EXCLUDE the following:
<ul style="list-style-type: none"> Gross wages and salaries before deductions Net income (gross income minus operating expenses) from a business or other non-farm enterprise Net income from farm self-employment (income from a farm which operates as an owner, renter, or sharecropper, after deductions from farm operating expenses) Social Security Disability Insurance (SSDI) Governmental and non-governmental pensions (including military retirement pay) Regular payments from railroad retirement benefits, strike benefits from union funds, worker's compensation and training stipends Alimony Merit based scholarships, fellowships, and assistantships i.e. the recipient may be determined by students' athletic, academic, artistic or other abilities Dividends, interest, net rental income, net royalties, periodic receipts from estates or trusts, and net gambling or lottery winnings Terminal leave pay, severance pay, or a cash out of accrued vacation leave Disaster Relief Employment wages On-the-Job Training (OJT) wages 	<ul style="list-style-type: none"> Unemployment compensation Child support payments and foster child care payments Old age and survivors' insurance benefits received under section 202 of the Social Security Act (42 U.S.C. 402) Income earned while the veteran was in Active Military Duty, and certain other Veteran's Benefits Federal non-cash benefits such as: Medicare, Medicaid, food stamps, school lunches, and housing assistance Assets drawn down as withdrawals from a bank Public Assistance payments: TANF, SSI, GA, and RCA One time cash payment, which includes: tax refunds, loans, one-time insurance payments or compensation for injury, gifts and lump sum inheritances Job Corps payments Cash value of employer-paid or union-paid portion of health insurance or other employee fringe benefits Cash value of food or housing received in lieu of wages Payments received under the Trade Readjustment Act of 1974 Needs-based scholarship assistance Financial assistance under Title IV of the Higher Education Act Stipends received from the following programs: VISTA, Peace Corps, Foster Grandparents Program, Retired Senior Volunteer Program, Youth Works/AmeriCorps Program All WIOA payments except OJT

WIOA Income Calculation Worksheet: Part II

Attachment E

IDENTIFYING INFORMATION			
Applicant's Name:	Last _____	First _____	MI _____
Participant ID: _____	Application Date: _____		

Income Period – From (6 months prior to application): _____ **To (application date):** _____

Family Member: _____ **Relationship:** _____

Straight Pay Method: Use this method if family member provides all income documents covering income review period.

#	Employer or Income Source	Pay Date	# Weeks in Time Frame	=	Pay Period Gross Pay
1				=	
2				=	
3				=	
4				=	
5				=	
6				=	
7				=	
8				=	
a) 6-Month Income: Sum of all Pay Period Gross Pays				=	

Average Pay Method: Use this method if family member provides at least 2 income documents from each source

#	Employer or Income Source	Pay Date	Gross Pay	÷	# Weeks in Time Frame*	=	Weekly Gross Income
1				÷		=	
2				÷		=	
3				÷		=	
a) Average Weekly Gross: Sum of Weekly Gross Income ÷ # of Pay Stubs						=	
b) 6-Month Income: Average Weekly Gross x # Weeks Included During Income Review						=	

* Time Frame: weekly = 1; bi-weekly = 2; monthly = 4.3

Year-to-Date Method: Use this method if the family member provides a recent pay stub or income source with the cumulative year-to-date gross income indicated on it.

#	Employer or Income Source	Pay Date	Cumulative Gross Pay	÷	# Weeks Cumulative	=	Weekly Gross Income
1				÷		=	
2				÷		=	
3				÷		=	
a) Average Weekly Gross: Sum of Weekly Gross Income ÷ # of Income Document						=	
b) 6-Month Income: Average Weekly Gross x # Weeks Included During Income Review						=	

Intermittent Work/Other Income Method: Use this method if the family member has not had steady income from one or more sources during the review period.

#	Employer	Description of Work	Start Date	End Date	Total Gross Income
1					
2					
a) 6-Month Income: Sum of all Total Gross Incomes					=

WIOA Youth Dropout Status Form

Attachment F

IDENTIFYING INFORMATION			
Applicant's Name:	_____		
	Last	First	MI
Participant ID:	_____	Application Date:	_____

I HEREBY CERTIFY UNDER PENALTY OF PERJURY, THAT I AM NO LONGER ATTENDING ANY SCHOOL AND THAT I HAVE NOT RECEIVED A SECONDARY SCHOOL DIPLOMA OR ITS RECOGNIZED EQUIVALENT.

Last School Attended: _____
Location: _____
Dates _____ **of** _____
Attendance: _____
Highest Grade Level Completed: _____

I ATTEST THAT THE INFORMATION STATED ABOVE IS TRUE AND ACCURATE, AND UNDERSTAND THAT THE ABOVE INFORMATION, IF MISREPRESENTED, OR INCOMPLETE, MAY BE GROUNDS FOR IMMEDIATE TERMINATION FROM THE PROGRAM, REPAYMENT OF ANY FUNDS EXPENDED ON THE PARTICIPANT, AND/OR OTHER PENALTIES AS SPECIFIED BY LAW.

 Applicant Signature

 Date

 Parent/Guardian or Other Responsible Adult Signature (if applicant is under 18)

 Date

CERTIFICATION	
I certify that the information recorded on this form was provided by the individual whose signature appears above.	
_____ Case Manager Signature	_____ Date

List of Acceptable Documents to Verify Eligibility to Work
All documents must be unexpired

Make sure DACA is covered**LIST A: Documents That Establish Both Identity and Employment Authorization**

1. U.S. Passport or Passport Card
2. Permanent Resident Card or Alien Registration Receipt Card (Form I-551)
3. Foreign passport that contains a temporary I-551 stamp or temporary I-551 printed notation on a machine-readable immigrant visa (MRIV)
4. Employment Authorization Document (Card) that contains a photograph (Form I-766)
5. In the case of a nonimmigrant alien authorized to work for a specific employer incident to status, a foreign passport with Form I-94 or Form I-94A bearing the same name as the passport and containing an endorsement of the alien's nonimmigrant status, as long as the period of endorsement has not yet expired and the proposed employment is not in conflict with any restrictions or limitations identified on the form
6. Passport from the Federated States of Micronesia (FSM) or the Republic of the Marshall Islands (RMI) with Form I-94 or Form I-94A indicating nonimmigrant admission under the Compact of Free Association Between the United States and the FSM or RMI

OR

LIST B: Documents That Establish IdentityFor individuals 18 years of age or older:

1. Driver's license or ID card issued by a state or outlying possession of the United States, provided it contains a photograph or information such as name, date of birth, gender, height, eye color, and address
2. ID card issued by federal, state, or local government agencies or entities, provided it contains a photograph or information such as name, date of birth, gender, height, eye color, and address
3. School ID card with a photograph
4. Voter's registration card
5. U.S. military card or draft record
6. Military dependent's ID card
7. U.S. Coast Guard Merchant Mariner Card
8. Native American tribal document
9. Driver's license issued by a Canadian government authority

For persons under age 18 who are unable to present a document listed above:

10. School record or report card
11. Clinic, doctor, or hospital record
12. Day-care or nursery school record

AND

LIST C: Documents That Establish Employment Authorization

1. U.S. Social Security account number card, unless the card includes one of the following restrictions: 1. Not valid for employment,
2. Valid for work only with INS authorization, or 3. Valid for work only with DHS authorization.

NOTE: A copy (such as a metal or plastic reproduction) is not acceptable.

2. Certification of Birth Abroad issued by the U.S. Department of State (Form FS-545)
3. Certification of Report of Birth issued by the U.S. Department of State (Form DS-1350)
4. Original or certified copy of a birth certificate issued by a state, county, municipal authority, or outlying possession of the United States bearing an official seal
5. Native American tribal document
6. U.S. Citizen Identification Card (Form I-197)
7. Identification Card for Use of Resident Citizen in the United States (Form I-179)
8. Employment authorization document issued by Department of Homeland Security

Note: Employment Verification for Deferred Action for Childhood Arrival (DACA) applicants that have been approved are issued an Employment Authorization Document (EAD) card by the U.S. Citizenship and Immigration Service (USCIS) valid for up to two years.

YOUTH TRAINING PROVIDER PROCUREMENT FORM

Attachment H

PARTICIPANT INFORMATION			
Applicant's Name: _____			
Last		First	MI
Participant ID: _____		Application Date: _____	

TRAINING PROVIDER #1		TRAINING LOCATION ADDRESS AND PHONE NUMBER	
COURSE OF TRAINING	TOTAL HOURS	TOTAL TUITION AND FEES	
SOURCE OF INFORMATION (choose one)			
CATALOG	WEB PAGE PRINT-OUT (attach)	TELEPHONE QUOTE (attach telephone verification form)	
TRAINING PROVIDER #2		TRAINING LOCATION ADDRESS AND PHONE NUMBER	
COURSE OF TRAINING	TOTAL HOURS	TOTAL TUITION AND FEES	
SOURCE OF INFORMATION (choose one)			
CATALOG	WEB PAGE PRINT-OUT (attach)	TELEPHONE QUOTE (attach telephone verification form)	
TRAINING PROVIDER #3		TRAINING LOCATION ADDRESS AND PHONE NUMBER	
COURSE OF TRAINING	TOTAL HOURS	TOTAL TUITION AND FEES	
SOURCE OF INFORMATION (choose one)			
CATALOG	WEB PAGE PRINT-OUT (attach)	TELEPHONE QUOTE (attach telephone verification form)	
Justification / Explanation for training selected:			

CERTIFICATION	
I certify that the information recorded on this form is accurate and was obtained as indicated by the signature and date below	
_____	_____
Case Manager Signature	Date

EMPLOYMENT PLAN ASSESSMENT

Name: _____

Preferred method of contact: phone voice mail email letter/mail text

WORK HISTORY SUMMARY

Enter the **number of months** the client worked (full time, at or above minimum wage) during the last 24 months:

PREVIOUS TRAINING/VOCATIONAL EXPERIENCE

TYPE COURSE	PROVIDER	LABOR MARKET COMPATIBLE		DATE COMPLETED
		YES	NO	

LITERACY ASSESSMENT: Conducted? Yes Date _____ No Scheduled Date _____

Score _____ Grade Level _____

SELF-INITIATED EDUCATION/TRAINING — Currently attending, or registered for, post-secondary education/training? Yes No

If yes, specify type of education/training:		Accredited Institution <input type="checkbox"/> Yes <input type="checkbox"/> No	Type Credential to be Awarded	Expected Completion Date
Training Relevant to Jobs Available <input type="checkbox"/> Yes <input type="checkbox"/> No	Training Relevant to Job Goals <input type="checkbox"/> Yes <input type="checkbox"/> No	Enrolled <input type="checkbox"/> Full Time <input type="checkbox"/> Part Time		Currently in good standing to continue enrollment? <input type="checkbox"/> Yes <input type="checkbox"/> No
If not approved activity, explain: _____				
Have you applied for FAFSA? <input type="checkbox"/> Yes <input type="checkbox"/> No				

CURRENT EMPLOYMENT SITUATION — is the client currently employed? Yes No

If yes, where? Get check stub!	Hours Worked Per Week
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STRENGTHS/EXPERIENCE/ASSETS/RESOURCES (Consider skills, experience, assets and resources that have been obtained or are available from prior employment, training, hobbies, volunteer work, home/family responsibilities, family support and personal characteristics.)

TRANSPORTATION

Transportation Resources (check all that apply)

Family Car
 Walk
 Public Transportation
 Ride w/ Friend or Relative
 Other (specify): _____

Client would need help with transportation costs or with access to means of transportation.

CHILD CARE

Child Care Resources (check all that apply)

Immediate Family
 Friend
 Relative
 School (no before or after school care needed)
 Other (specify): _____

None
 Client would need help with locating and paying for child care resources or with financing self-arranged child care.

BARRIER IDENTIFICATION — (check all that apply)

No HS Diploma or GED
 Felony or Misdemeanor

Language Barrier
 Pregnant/Parenting Teen
 Domestic Violence
 Temporary Housing
 Lack of Recent/Steady Work History

Improvement in Education Level/Literacy Level Necessary for Employment Opportunities in Area

Additional Employment-Related Skills Necessary for Employment Opportunities in Area

Pregnant: Give the anticipated delivery date

Physical/Mental Disability or Condition

Currently receiving medical care?	Expected Duration
<input type="checkbox"/> Yes <input type="checkbox"/> No	

Provides Daily Personal Care to Family Member

Other Family Problems (child abuse, gangs, school problems, problems with law enforcement, problems with children, etc.)

If so, briefly describe: _____

OVERALL CAREER GOAL	
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CURRENT INVOLVEMENT WITH OTHER AGENCIES/ SERVICES OR REFERRAL TO OTHER AGENCIES/ SERVICES

AGENCY NAME	TYPE SERVICE	AGENCY CONTRACT

Participant signature:	Date:
Staff signature:	Date:

IDENTIFYING COMBINATION OF SERVICES TO OVERCOME NEEDS & BARRIERS

1. TABE Test Assessment:

Is Participant Basic Skills Deficient? Yes No (If yes choose how you will address)

Check if Providing	Training/Where	Date to Start
	Study Skills Training	
	Tutoring in ResCare Academy	
	Tutoring at training facility	
	Refuses Tutoring of any kind	
	Other (Explain)	

2. Traitify Assessment:

Does Interest results match participant career choice? Yes No

If not participant must understand and agree this is still what they want to do.

3. Employment Plan Assessment:

High School Dropout? Yes No

Check if Providing	Training/Where	Date to Start
	ABE Classes	
	ResCare GED Academy	
	Refuses to try to attain HSD or equivalent	
	Other (Explain)	

Lacks Skills, Training or a Credential

Check if Providing	Training/Referral/Where	Date to Start
	Occupational Skills Training	
	ResCare Academy Occupational Skills	
	Referral to Job Corps	
	Other (Explain)	

Does participant have a criminal record that is a barrier to employment:

Check if Providing	Training/Where	Date to Start
	Referral to Legal Aid	
	Other (Explain)	

English as a Second Language:

Check if Providing	Training/Where	Date to Start
	ESL Classes	
	Other (Explain)	

Lack of Transportation:

Check if Providing	Service/Referral	Date to Start
	Gas Card	
	Mileage Reimbursement	
	Referral	
	Bus Pass	
	Other (Explain)	

Substance Abuse:

Check if Providing	Service/Referral	Date to Start
	Referral to Agency(list)	
	Refuses to try to seek assistance	
	Other (Explain)	

No Driver's License:

Check if Providing	Referral	Date to Start
	Referral	
	Other (Explain)	

Lack of Child Care or Dependent Care:

Check if Providing	Training/Referral/Where	Date to Start
	Referral to DHS	
	Supportive Service if Available	
	Other (Explain)	

Poor Work History:

Check if Providing	Training/Where	Date to Start
	Work Experience or OJT	
	Other (Explain)	

Difficulty finding employment:

Check if Providing	Training/Referral/Where	Date to Start
	Resume Development	
	Interview Assistance	
	Job Search Assistance	
	Referral for Job Development through Veterans or Workforce programs	
	Other (Explain)	

Other Barriers including Soft Skills Development:

Check if Providing	Training/Referral/Where	Date to Start
	Soft Skills in ResCare Academy	
	Referrals	

	Other (Explain)	
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4. Budget:

Are there any needs in the budget that are not addressed above? _____

(Developing and maintaining a budget is a financial literacy service)

PERSONAL MONTHLY BUDGET

Projected Monthly Income	
Income 1	\$
Extra income	\$
Total monthly income	\$

HOUSING	Projected Cost
Mortgage or rent	
Phone	
Electricity	
Gas	
Water and sewer	
Cable	
Waste removal	
Maintenance or repairs	
Supplies	
Other	

ENTERTAINMENT	Projected Cost
Video/DVD	
CDs	
Movies	
Concerts	
Sporting events	
Live theater	
Other	
Other	
Other	

Subtotal

Subtotal

TRANSPORTATION	Projected Cost
Vehicle payment	
Bus/taxi fare	
Insurance	
Licensing	
Fuel	
Maintenance	

LOANS	Projected Cost
Personal	
Student	
Credit card	
Credit card	
Credit card	
Other	

Other

Subtotal

INSURANCE	Projected Cost
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Home

Health

Life

Other

Subtotal

PERSONAL CARE	Projected Cost
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Medical

Hair/nails

Clothing

Dry cleaning

Health club

Organization dues or fees

Other

Subtotal

Subtotal

FOOD	Projected Cost
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Groceries

Dining out

Other

Subtotal

SAVINGS OR INVESTMENTS	Projected Cost
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Retirement account

Investment account

Other

Subtotal

Total Cost	\$
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