



**GREEN
COUNTRY
WORKFORCE**

**GREEN COUNTRY WORKFORCE
DEVELOPMENT BOARD**

14002 E. 21st St.
Suite 825
Tulsa, OK 74134

Workforce Innovation and Opportunity Act

Youth Program Policy

Chair, Green Country Workforce Development Board

Date

No individual in the United States may, on the basis of race, color, religion, sex, national origin, age, [disability](#), or political affiliation or belief, or, for beneficiaries, applicants, and participants only, on the basis of citizenship or participation in any WIOA Title I-financially assisted program or activity, be excluded from participation in, denied the benefits of, subjected to discrimination under, or denied employment in the administration of or in connection with any WIOA Title I-financially assisted program or activity.



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I. Purpose

Green Country Workforce Development Board (GCWDB) provides this guidance to Green Country Workforce Development Area (GCWDA) system partners on the implementation requirements for the WIOA Title I youth program. This policy establishes GCWDB standards for the implementation, design, and parameters of the WIOA Title I youth formula program, with emphasis on priority of service to out of school youth (OSY) and youth program activities including expenditure, eligibility, and program elements. This policy is established in accordance with applicable state and federal laws and regulations.

II. Effective Date

GCWDB BD Approved and Effective 07/26/2023

NOTE: All GCWDB Policies and attachments are available for download at:

<https://www.greencountryworks.org/resources/policy-research-best-practices/>

III. Policy

WIOA outlines a broad youth vision that supports an integrated service delivery system and provides a framework through which state and local areas can leverage other federal, state, local, and philanthropic resources to support OSY and in-school youth (ISY). WIOA affirms the United States Department of Labor's (USDOL's) commitment to providing high-quality services for all youth and young adults: beginning with career exploration and guidance, continuing with support for educational attainment and opportunities for skills training in high demand industries and occupations, and culminating with a job which will provide self-sufficiency and opportunity for advancement along a career pathway, enrollment in post-secondary education, a Registered Apprenticeship or internship. All USDOL youth-serving programs continue to promote evidence-based strategies to assist in achieving high-levels of performance, accountability, and quality in preparing young people for the workforce.

FUNDING

The primary focus of the Title I youth formula program is to support the educational and career success of OSY, with an expectation that the shift in focus will result in a reconnection of OSY to education and jobs. The OSY focus is evident in the requirement that a minimum 75 percent (75%) of WIOA youth funds be spent on OSY. The minimum 75% OSY expenditure applies to GCWDB funds and funds reserved by the Governor. Further, the 75% expenditure rate is a minimum requirement. Therefore, GCWDB may spend up to 100 percent of GCWDB youth funds on OSY, if they choose. This decision will be reviewed yearly and reflected in the GCWDB budget which is modified and approved yearly. There is a focus on work experience with a 20 percent (20%) expenditure requirement as detailed on page 31 and 5 percent (5%) above income expenditure limitations as detailed beginning on page 16. In the case of youth participant co-enrolled in the adult or dislocated worker programs, funding may be maximized using cost sharing between programs as funding streams allow.

PROGRAM DESIGN AND SERVICE DELIVERY

All individuals who engage in workforce services through a GCWDA Oklahoma Works American Job Center (AJC) and the State of Oklahoma's (State's) mandated system, the virtual case management



Equal Opportunity Employer/Program. Auxiliary aids and services are available upon request for individuals with disabilities.

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system, are entitled to receive an initial assessment and a determination of eligibility for the WIOA Title I youth program.

Case Management

The design framework services of local youth programs must provide case management to participants including assessment, planning and development of an Individual Service Strategy (ISS), continued provision of services and referrals to services, progress review, and follow-up. WIOA case management is a client-centered approach designed to provide career exploration and guidance, services, and referral to services to assist youth with overcoming barriers to education and/or employment, support for educational attainment and opportunities for training in high demand occupations and industries, and job placement. In addition, case management includes broader functions like facilitation, communication, and coordination to ensure that each youth receives one-on-one contact and guidance, as needed, to participate in and benefit from the activities set forth in the ISS. At any point an applicant or participant discloses a barrier or if a barrier is observed during the ongoing assessment of and case management for an individual, appropriate accommodations, services, or referrals to services must be made. Any issue must be followed up, clarifying if the issue was resolved, if the participant received a service, if the issue has worsened, etc. If a problem remains or worsens, the case manager must identify a plan of action for resolution. Case management is the act of connecting youth to appropriate services, not a program element, and should not be reported as one of the 14 youth program elements in the Participant Individual Record Layout (PIRL). At any point there is a gap in service, it must be noted in case notes and recorded in "Schedule a Service Gap" in the virtual case management system. Case management involves regular contact with a participant which, at a minimum, must be conducted face-to-face every thirty (30) days. Contact with a participant for case management purposes is not considered a program service and will not prevent program exit. Procedures for more frequent contact for individuals enrolled in short-term training programs are particularly important for those in short-term training programs that are scheduled for completion in 30 days or less to help participants address any challenges they face during the short-term training. GCWDB requires contact with any participant attending short-term training at least 3 times during the training, and the minimum three case management contacts during the training must take place at the beginning, middle, and end of training.

Reasonable Accommodations

Including accommodations available at the GCWDB website (www.GreenCountryWorks.org), GCWDB policies, and CASAS (GCWDB's chosen NRS approved EFL assessment), GCWDA strives to accommodate all individuals. To this end, GCWDA Oklahoma Works AJCs are equipped with accessibility kits. GCWDA Oklahoma Works AJC staff are expected to orientate themselves with the contents of the bag and request technical assistance from the GCWDA One-Stop Operator (OSO) on any items. Center managers may also request an orientation session on these kits from the OSO. GCWDA Oklahoma Works AJCs strive for 100% accessibility. Comprehensive and affiliate centers are reviewed yearly during center certification. Additional accessibility information is provided in the Vital Service and Information Notice (Attachment ZZ). Under Section 188 of WIOA and related regulations, providers must provide reasonable accommodations to qualified individuals with disabilities, unless providing the accommodation would cause undue hardship. No qualified individual with a disability may be excluded from participation in or be denied the benefits of a service, program, or activity or be subjected to discrimination because facilities are inaccessible or

unusable by said individual.

Virtual Case Management System

GCWDA does not keep paper files. Any and all case information must be entered, uploaded, noted, and otherwise appropriately documented in Oklahoma's State approved and mandated virtual case management system. If any event is not properly recorded and documented, that event is considered as not occurred.

Case Notes

Case notes, referred to as both Client Notes (pre-enrollment) and Program Notes (post-enrollment) in the virtual case management system, must be entered each time contact is made or attempted with a client and any time action is taken on a client's behalf. Case notes must provide detailed information on the coordination of services and all case management activities must be documented in detail. Detailed case notes are an important aspect of case management because they tell the story of an individual and help maintain continuity of services at every stage of service provision (i.e., application, eligibility determination, enrollment, identified services and needs, services provided, referrals made, and status of participation at any given point through follow-up to exit). Monitors or other authorized personnel should be able to read case notes and ascertain where an individual is in the GCWDB WIOA process, what the relevant needs are and how needs are being addressed. Case notes describe an individual's application to and participation in WIOA programs, providing eligibility information, tracking progress and setbacks in the achievement of stated objectives, providing facts pertinent to an individual's training and employment, detailing service needs, provision and referrals, and detailing outcomes. Information contained in case notes should be relevant to the eligibility, enrollment, needs, services, and education and employment goals of the individual. Service provider staff must maintain a written record of communication with participants from the date of application to exit through follow-up. Case managers are required to enter case notes at every interaction, point of contact or attempted contact with an individual, every contact or action on behalf of an individual, when the participant receives a service, has a service status update or outcome, or makes contact with a case manager. Point of contact includes all correspondence with the participant, including email, phone call, text, letter, private message, verbal, written messages, and mail-outs to the individual. Case notes should be entered timely following the event or contact. Case notes may be grouped together when services are sequential and/or provided on the same day. If more than one service is provided on the same day, each service must:

- Be distinguishable by type and/or title of service (e.g., Eligibility, IEP, ITA, etc.),
- Provide complete description of each service, and
- Correlate with uploaded and recorded documentation on the same day.

Case notes should NOT include any Health Insurance Portability and Accountability Act (HIPAA) protected information.

On December 6th, 2018, the U. S. Department of Labor, Employment and Training Administration, Division of Workforce Investments, Region IV provided advice of the STAR method for case noting. The STAR case note method consists of: S – Situation, background, set the scene; T – Task or Target, specifics of what is required, when, where, who; A – Action, what you did, skills used, behaviors,

characteristics; R – Result, outcome, what happened. This method is recommended to include in program notes by GCWDB.

All case notes *must*:

- Be detailed, reflecting the complete interaction or action,
- Have the proper use of pronouns, subject-verb agreement, correct spelling, be coherent, and contain accurate information,
- Be entered daily (under normal circumstances) after any action related to the case and no more than seven (7) days under special circumstances, and
- Be consistent with other information entered in the virtual case management system.

Declination of Services

At any point an individual declines WIOA services, a detailed case note must be entered.

Failure to Complete Activities Within Specified Time Frame

If any required action of service provider staff is not completed within a specified time frame, an explanation in the form of a detailed case note must be entered.

Uploads

All documents related to any case note must be uploaded in the virtual case management system. Uploaded documentation must be clear and legible. Some documentation may be source documents for more than one data element and need only to be uploaded one time, provided all data elements are indicated prior to the upload. Upload documentation according to the guidelines below.

Click on “Add New Document”

Documentation Item:

- Choose the item being uploaded.

Uploaded Documentation:

- Universal: Documentation used to determine eligibility.
- Enrollment: Documentation used to validate or support data elements, career services, training, performance measures, or other documents required by state and/or local policy.

Type of Document (Multiple types of documentation can be chosen.):

- Eligibility: documentation was used to determine eligibility.
- Validation: documentation was used to validate data/information entered into the virtual case management system.
- Supporting: documentation is used to support a service and training entry or case note entered into the virtual case management system.
- Follow-up: documentation to support follow-up services.
- Employment Planning: documentation used to support employment planning.

Data Elements to be verified:

- Data Elements to be verified vary by enrollment.
- If multiple enrollments are chosen, you will be required to choose the applicable data element for each enrollment.

Participant

For the WIOA Title I youth program, a participant is a reportable individual who has satisfied all applicable program requirements for the provision of services, including

- Eligibility determination,
- Objective assessment,
- Development of an ISS, and
- Received at least 1 of the 14 program elements.

The point of program participation does not begin until after the youth is determined eligible and is enrolled. All youth program elements, except follow-up services, trigger participation following eligibility determination and enrollment, an objective assessment, and completion of the ISS.

Application and Registration

A GCWDB WIOA Title I Youth programs application titled “Apply for Services” is available on the home page of the GCWDB website at www.greencountryworks.org. At the point an applicant clicks “SUBMIT INFORMATION,” the system sends an e-mail directly to the designated service provider staff person, as well as to the GCWDB executive director. Paper applications are also available and may be submitted via a variety of methods.

At the point an application is received by designated service provider staff person via the electronic system from www.greencountryworks.org, via e-mail, via facsimile (fax), via paper copy, and via any other documentable method, the following steps and time frame apply. Therefore, service provider staff absences or vacancies shall be covered immediately and the GCWDA OSO, GCWDB executive director, respective Oklahoma Works American Job Center (AJC) manager, and any other appropriate individuals promptly advised via e-mail of the staff absent or vacant, the staff person covering and the duration of the coverage or expected duration of the coverage, with additional e-mail reflecting updates to the coverage submitted in a timely manner. This process is to ensure no lapse in services.

The service provider will put procedures in place for timely processing of applications and shall submit that process in written form to the GCWDB executive director at the beginning of every program year or upon request by GCWDB.

Upon receipt of an application by a case manager, the case manager will immediately:

- Check for completion of the applicant’s registration in the virtual case management system;
- Review the application, referral form (if one exists), any other documents received pertaining to the applicant, and all workforce history and case notes in the virtual case management system to familiarize themselves with the applicant;
- Contact the applicant via the applicant’s phone number, or other contact method noted by the applicant, and follow-up via e-mail: confirming instructions conveyed and any determinations made or confirming attempted contact via phone call, voicemail, or text, to include case manager name, office phone number, link, and quick response (QR) code to Oklahoma Office of Workforce Development’s (OOWD’s) GCWDA Customer Satisfaction Survey: <https://www.surveymonkey.com/r/GreenCountryWFB>



At first contact the case manager must:

- Ensure the applicant has completed registration in the virtual case management system, The State of Oklahoma's current online case management system. If the application has not completed registration, instruct the application to do so and provide technical assistance to aid in the completion if necessary. Case managers may not provide answers to questions within the virtual case management system registration or complete the virtual case management system registration for the applicant but may provide technical assistance to accomplish completion.
- Determine if current basic eligibility documents are uploaded in the participants the virtual case management system account. If basic eligibility documents are not present, request basic eligibility documents. Provide technical assistance to help obtain those documents if necessary.
- Request program eligibility documents, providing technical assistance to help obtain those documents if necessary.
- Perform initial assessment or set an appointment to do so, including assessment for Basic Skills Deficiency (see page 22).
- Document existing skills, work history, career pathway discussion and an outline of the quickest route to gainful employment which will achieve self-sufficiency.
- Determine basic eligibility for the youth program. Every applicant regardless of Oklahoma Workforce Development Area must be provided basic eligibility determination.
- Provide applicants with the Basic Service:
 - "Referral to WIOA Services" if the applicant is determined to be outside of GCWDA, referring the applicant to the appropriate workforce development area using the Referral to Partner or Community Resource available at <https://www.greencountryworks.org/resources/policy-research-best-practices/>; or
 - "Orientation to WIOA Services" if the applicant is determined to be inside GCWDA, including requirements of participation and follow-up services addressed with the applicant.
- Provide every applicant with the Complaint Procedures Condensed available at <https://www.greencountryworks.org/resources/policy-research-best-practices/>, verbal advice of complaint procedures, including that an Equal Opportunity Officer (EOO) is available to assist with the process and that Complaint Procedures Condensed is available at any time at <https://www.greencountryworks.org/resources/policy-research-best-practices/>, as are Discrimination and Complaint Procedures and Programmatic Grievances and Complaints Policy, all which may be visually read, screen reader read, or provided printed at request, as well as in large font either digitally or printed at request, to applicants or any person.

The service provider will put procedures in place for timely processing of eligibility determination and enrollment and shall submit that process in written form to the GCWDB executive director at the beginning of every program year or upon request by GCWDB.

Enrollments and eligibility are valid for thirty (30) days and will not be backdated. Enrollments left in pending status over 30 days will automatically be denied. Program enrollments denied for being in pending status over 30 days require a redetermination of eligibility and new enrollment completed, including collection of data validation documentation. Enrollments open for less than thirty (30) days do not count toward service provider contract extension measures, although clients may fall into federal performance measures.

If an applicant is enrolled in any program, applicable and adequate services must be provided to address all needs and barriers. Please review Oklahoma Workforce Development Issuance (OWDI) #09-2017, CHANGE 2, Attachment I: Service List (available at <https://oklahomaworks.gov/local-workforce-boards/wioa-policy-center/>), noting which services do and which services do not “Set Participation” and the services applicable to each program.

National Reporting System (NRS) approved educational functioning level (EFL) assessment must be completed, if necessary, as soon as possible, and not later than thirty (30) business days following program enrollment. A NRS approved EFL assessment must be administered if an applicant is a school dropout, has ever been on an Individualized Educational Plan (educational IEP) or if the case manager determines a need for EFL assessment.

There is no self-service concept for the WIOA youth program. Every individual receiving services as a WIOA youth must meet ISY or OSY eligibility criteria and formally enroll in the program.

The following individuals are not participants:

- Individuals who only use the self-service system,
- Individuals who receive information-only services or activities, which provide readily available information that does not require an assessment by a staff member of the individual’s skills, education, or career objectives.

This is the beginning of the initial assessment which, for youth, provides a base for the objective assessment and building blocks for ISS development.

Application Case Note:

- Includes the date the application was received
- Includes the date contact or attempted contact was made to the applicant
- Includes if the contact was in person, by telephone, or if a voicemail, text message, or other communication was made
- Includes what was said or conveyed during the contact
- Includes that applicant was advised of complaint procedures and provided a copy of Complaint Procedures Condensed from <https://www.greencountryworks.org/resources/policy-research-best-practices/>

Upload:

- Completed GCWDB WIOA Application for Services (form or online digital record)
- Referral form if one exists
- Signed Complaint Procedures Condensed

S&T:

- Orientation to WIOA Services (for applicants in GCWDA)
- Referral to WIOA Services (for applicants outside GCWDA)

Basic Eligibility

All WIOA program applicants must provide documentation of basic eligibility:

- Age/date of birth,
- Selective Service registration (if applicable), and
- Eligibility to work in the United States, see List of Acceptable Documents to Verify Eligibility to Work in the GCWDB DVSDR policy at <https://www.greencountryworks.org/resources/policy-research-best-practices/>.

Selective Service Registration:

The service provider that enrolls individuals in WIOA Title I-funded activities is the entity responsible for verifying selective service registration for males seeking to enroll in WIOA programs. If a male turns 18 while participating in any applicable services, registration with Selective Service must be completed no later than 30 days after he becomes 18 in order to continue to receive WIOA Title I-funded services. If a man under the age of 26 refuses to register with the Selective Service, WIOA Title I-funded services must be suspended until he registers.

Acceptable documentation showing registration status includes:

- Selective Service Acknowledgement letter
- Form DD-214 “Report of Separation”
- Screen printout of the Selective Service Verification which can be found at <https://www.sss.gov/verify/>. For males who have already registered this website can be used to confirm their Selective Service number as well as the date of registration, by entering a last name, social security number, and date of birth.
- Selective Service Registration Card
- Selective Service Verification Form (Form 3A)
- Stamped Post Office Receipt of Registration

Exceptions to Selective Service Registration

For U.S. citizens, Selective Service registration is not required if the individual falls within one of the following categories.*In these instances, service staff may proceed with enrollment and service delivery:

- Men born on or before December 31, 1959;
- Men who are serving in the military on full-time active duty;
- Men attending the service academies;
- Disabled men who are continually confined to a residence, hospital, or institution; and/or
- Men who are hospitalized, institutionalized, or incarcerated are not required to register during their confinement; however, they must register within 30 days after being released if they have not yet reached their 26th birthday.
- Persons who were designated female at birth and have since undergone gender

reassignment.**

For non-U.S. citizens, Selective Service registration is not required if the man falls within one of the following categories:

Non-U.S. male who came into this country for the first time after his 26th birthday. Acceptable forms of supporting documentation include:

- Date of entry stamp in his passport;
- I-94 with date of entry stamp on it; or
- Letter from the U.S. Citizenship and Immigration Services (USCIS) indicating the date the man entered the United States presented in conjunction with documentation establishing the individual's age.
- Non-U.S. male who entered the U.S. illegally after his 26th birthday must provide proof that he was not living in the U.S. from age 18 through 25.
- Non-U.S. male on a valid non-immigrant visa.

*Note: This list is not intended to be exhaustive. Please visit the Selective Service website for more information about the registration requirements at www.sss.gov. Selective Service also provides a quick reference chart at <https://www.sss.gov/wp-content/uploads/2020/11/WhoMustRegisterChart.pdf> showing who must register.

**Note: Per the Selective Service website, individuals who are born female and have a gender transition are not required to register regardless of their current gender or transition status. U.S. citizens or immigrants who are born male and have had a gender transition are still required to register.

Males 26 and Older Who Are Not Registered

GCWDB requires a completed Selective Service Status Form, available at <https://www.sss.gov/forms>, signed by the applicant, and a signed detailed statement that outlines the reason(s) why the participant did not register with Selective Service to the GCWDB executive director or designated board staff for review and final determination.

If the Director determines the non-registration was knowing and willful, the participant has the option of requesting a Status Information Letter from the Selective Service website using the Selective Service Status Form.

Requesting a Status Information Letter

An individual may obtain a Status Information Letter (<https://www.sss.gov/forms>) from Selective Service if he believes he was not required to register or did register but cannot provide any of the documentation listed in Section 3 of the Selective Service Status Form. If an individual decides to request a Status Information Letter, they will need to describe, in detail, the circumstances that prevented him from registering (e.g., hospitalization, institutionalization, incarceration, and/or military service from age 18 through 25) and provide documentation of those circumstances to the Selective Service System (SSS). The documentation should be specific as to the dates of the circumstances.

If the Status Information Letter indicates that an individual was not required to register for the Selective

Service, then he is eligible to enroll in a WIOA-funded service and service provision should proceed. If the Status Information Letter indicates that the individual was required to register but failed to do so, the individual may only receive services if they can provide evidence to establish the failure to register was not knowing and willful. All costs associated with grant-funded services provided to non-eligible individuals may be disallowed.

How to Determine Knowing and Willful Failure to Register

GCWDB executive director or designated board staff will be responsible for evaluating the evidence presented by the individual to determine whether the failure to register was a knowing and willful failure. The individual should be encouraged to offer as much evidence and in as much detail as possible to support his case. Evidence must include the individual's signed A written explanation and supporting documentation of his circumstances at the time of the required registration and the reasons for failure to register. The following are examples of documentation/evidence that may be of assistance in making a determination in these cases:

- Service in Armed Forces. Evidence that a man has served honorably in the U.S. Armed Forces such as DD Form 214 or his Honorable Discharge Certificate. Such documents may be considered sufficient evidence that his failure to register was not willful or knowing.
- Third Party Affidavits. Affidavits from parents, teachers, employers, doctors, etc. concerning reasons for not registering may also be helpful to grantees in making determinations in cases regarding willful and knowing failure to register.

In order to establish consistency regarding the implementation of the requirement, SSS has designated the following questions as a model for determining whether a failure to register is knowing and willful.

In determining whether the failure was "knowing," GCWDB executive director or designated board staff will consider:

- Was the individual aware of the requirement to register?
- If the individual knew about the requirement to register, was he misinformed about the applicability of the requirement to him (e.g., veterans who were discharged before their 26th birthday were occasionally told that they did not need to register)?
- On which date did the individual first learn that he was required to register?
- Where did the individual live when he was between the ages of 18 and 26?
- Does the status information letter indicate that Selective Service sent letters to the individual at that address and did not receive a response?

In determining whether the failure was "willful," GCWDB executive director or designated board staff will consider:

- Was the failure to register done deliberately and intentionally?
- Did the individual have the mental capacity to choose whether or not to register and decide not to register?
- What actions, if any, did the individual take when he learned of the requirement to register?

If GCWDB executive director or designated board staff determine it was not a knowing and willful failure and the individual is otherwise eligible, services may be provided. If the service provider

staff determines that evidence shows that the individual's failure to register was knowing and willful, WIOA services must be denied. All documents must be uploaded into the virtual case management system.

Basic Eligibility Case Note:

- Date Verified – Identify the date that the information collected in this note was validated
- Age documentation
- Eligibility to Work in the United States documentation
- Selective Service Registration documentation (if applicable)

Upload:

- Documents verifying basic eligibility

Referral

The design framework services of local youth programs must ensure that WIOA youth service providers meet the referral requirements for all youth participants, including:

- Providing participants with information about the full array of applicable or appropriate services available through GCWDB or other eligible providers, or one-stop partners;
- Referring participants to appropriate training and educational programs that have the capacity to serve them either on a sequential or concurrent basis using the Referral to Partner or Community Resource available at <https://www.greencountryworks.org/resources/policy-research-best-practices/> ;
- Ensuring referral to youth who apply for enrollment in a program of WIOA youth activities and either do not meet the enrollment requirements for that program or cannot be served by that program. The eligible training provider of that program must ensure that the youth is referred for further assessment, if necessary, or referred to appropriate programs to meet the skills and training needs of the youth.
- Ensuring appropriate referrals to an applicant who declines GCWDB WIOA services.
- Entering referral information in the virtual case management system under "Interagency Referrals."

Referral Case Note:

- Includes referral date
- Includes the partner, agency, community organization name referred to
- Includes a statement as to why the referral is made

Upload:

- Completed Referral to Partner or Community Resource

Referral Outcome Note:

- Restates referral case note information
- States outcome of the referral

Program Eligibility

Most of the information needed to determine program eligibility will be completed and entered into the system by service provider staff, with cooperation by the applicant, and after self-registration in the virtual case management system is complete. For information on eligibility and documentation requirements, please see GCWDB DVSDR policy at <https://www.greencountryworks.org/resources/policy-research-best-practices/>.

Determination of School Status

School status is determined at the time of program enrollment and must be based on the status at the time eligibility determination is made. School status remains the same throughout the youth's participation in the WIOA Title I youth program and is critical as it determines how expenditures will be reported.

Definition of "School" for OSY and ISY Eligibility Determination:

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

- Adult Education under Title II of WIOA;
- Youth Build;
- Job Corps;
- Dropout re-engagement programs; and
- High school equivalency (HSE) programs.

There is one exception. Youth attending HSE programs, including those considered to be dropout re-engagement programs funded by the public K–12 school system, who are classified by the school system as enrolled in school are considered ISY.

OSY Eligibility

OSY youth is an individual who is:

- Not attending any school (as defined under State law, Oklahoma Code, Title 70-1-106), and
- Not younger than age 16 or older than age 24 at time of enrollment.

Because age eligibility is based on age at enrollment, OSY participants may continue to receive services beyond the age of 24 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/dislocated worker programs to maximize program resources designed to meet the needs of the individual. Co-enrollment must meet all requirements as per policies until the participant exits.

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

1. A school dropout,
2. 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 an area school district defines its school year quarters. In cases where schools do not use quarters, GCWDA programs must use calendar year quarters.
3. A recipient of a secondary school diploma or its recognized equivalent who is a low-income individual and is either basic skills deficient or an English language learner,
4. An offender (juvenile who is or has been subject to any stage of the criminal justice process),
5. Homeless individual 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,
6. Individual in foster care or who has aged out of the 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,
7. An individual who is pregnant or parenting,

8. An individual with a disability, or
9. A low-income individual who also requires additional assistance to enter or complete an educational program or to secure or hold employment, as described in one of the following:
 - A youth with a parent or legal guardian that is currently or previously incarcerated for a felony conviction,
 - A youth with a parent or legal guardian who lacks a high school diploma or GED
 - A youth who attends or has attended chronically underperforming schools listed as a priority or targeted intervention school on the OSDE website <http://sde.ok.gov/sde/priority-schools>,
 - A youth between 18-24 years of age with a pattern of poor work history, such as non-reoccurring employment income or sporadic employment.

The low-income requirement applies only to the following categories of OSY:

- A recipient of a secondary school diploma or its recognized equivalent who is either basic skills deficient or an English language learner, and
- An individual who requires additional assistance to enter or complete an educational program or to secure or hold employment.

Because not all OSY are required to be low-income, the five percent (5%) OSY low-income exception under WIOA is calculated based on the five percent (5%) of *all* youth enrolled in a given program year who are required to meet the low-income criteria. Under WIOA, the term “low-income” also includes youth that lives in a high poverty area. This exception will be at the discretion of the GCWDB Board Director. Example: There would have to be ninety-nine (99) youth enrolled in a program year, in order to enroll one (1) OSY as low-income that requires additional assistance.

ISY Eligibility

An ISY is an individual who is low-income and:

- Attending school (as defined under State law, Oklahoma Code, Title 70-1-106), including secondary and postsecondary school,
- Not younger than age 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 age 21 at time of enrollment.

Because age eligibility is based on age at enrollment, ISY 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/dislocated worker program to maximize program resources designed to meet the needs of the individual. Co-enrollment must meet all requirements as per policies until the participant exits.

Youth eligible to be served as ISY must be low-income and fall into one or more of the following categories:

1. An individual who is 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. An individual in foster care or who has aged out of foster care
6. An individual who is pregnant or parenting
7. An individual with a disability

A low-income individual who requires additional assistance to complete an educational program or to secure and hold employment with one of the following:

- A parent or legal guardian that is currently or previously incarcerated for a felony conviction,
- A parent or legal guardian who lacks a high school diploma or GED,
- Attends or has attended chronically under performing schools listed as a priority or targeted intervention school on the OSDE website <http://www.ok.gov/sed/priority-schools>,
- A youth between eighteen (18) and twenty-one (21) years of age with a pattern of Poor Work History.
 - Poor Work History is defined as: Has no past work history, has been fired from a job, working less than full time, has sporadic work history (history of job hopping).

Low-income must be determined by recording all income received over the last six (6) months.

WIOA Income Eligibility Form: Part I in the DVSDR policy at

<https://www.greencountryworks.org/resources/policy-research-best-practices/> contains income requirements.

The low-income requirement applies to all ISY unless they are served under the five percent (5%) exception. The five percent (5%) exception allows an ISY that is not low-income to be served as long as ninety-five percent (95%) of the ISY enrolled in a program year are low-income.

Example: There would have to be twenty (20) ISY enrolled in a program year in order to enroll one (1) ISY that is not low-income under the five percent (5%) exception allowed. This exception will be at the discretion of the GCWDB executive director.

The State has established the definitions and eligibility documentation requirements for the criteria, “an individual who requires additional assistance to enter or complete an educational program or to secure or hold employment.” Not more than five percent (5%) of ISY in a given program year can be eligible based on this barrier.

High Poverty Area and Low-Income Criteria

The 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 ISY and for two barriers for OSY. 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 (OTSA) (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 (25%) as set every five (5) years using American Community Survey 5-Year data. Instructions from the Census Bureau are as follows:

Determining if an overall city or county has a poverty rate of twenty-five percent (25%).

First, check to see if your overall city or county has a poverty rate of twenty-five percent (25%) or above. Go to [Census.gov](https://www.census.gov) or click on <https://www.census.gov>. In the middle of the page, go to “Quick Facts: Access Local Data” and click on the arrow. On the top of the page that comes up, type

in the name of your city or county and then click on your city or county from the list provided of places with the same name. Scroll down near the bottom of the table to “Income and Poverty” and it will give you the poverty rate of your city or county. If the poverty rate is twenty-five percent (25%) or above, that is all that you need to do to show that your city or county is a high-poverty area.

Determining if an individual lives in a high-poverty area based on their street address consists of two steps.

1. Determining the Census tract in which the street address is located, and second determining the poverty rate of the Census tract. For the first step, click on <https://geocoding.geo.census.gov/geocoder/geographies/address?form>. There will be two choices: “Find Locations Using...” and “Find Geographies Using...” Click on the second option to “Find Geographies.” Type in the street address, city, and state. You do not need to type in the zip code. Click on Find. A list of information will appear giving geographic identifiers first by Matched Address, then by Census Blocks, States, Counties, then by Census Tracts. Scroll down near the bottom of the page to Census Tract. In the middle of the information for Census tracts there will be column listed as “NAME.” This will give the Census tract number of the street address. For Example; Census Tracts is: “NAME: Census Tract 1030, Oklahoma County, Oklahoma”.
2. Go to the American Community Survey home page by clicking on <https://www.census.gov/programs-surveys/acs>. On the left side of the American Community Survey (ACS) home page, click the fourth option which is “Data.” When the Data page comes up in the middle column in the middle of the page under Data Tables and Tools, click on “Subject Tables.” On the top right-hand corner of the page in the Search Box type in “S1701”. Click on the table titled “Poverty Status in the Past 12 Months”. At the top of the page, it will say 2018: ACS 1-Year Estimates Subject Tables. Click on the drop-down arrow and a list of tables will appear. Click on “2018: ACS 5-Year Estimates Subject Tables”. You need 5-year data because 1-year data will be too small of a sample size to show data on Census tracts. Then right next to where you have selected the 2018 ACS 5-Year Estimates click on “CUSTOMIZE TABLE”. After you have clicked on CUSTOMIZE TABLE you will be taken to a page with several options across the top of the page. Click on “Geographies.” After you click on Geographies you will be taken to a page with a list of options on the left of the page, including Nation, Region, Division, State, County, Tract...etc. Click on “Tract.” There is a dropdown menu for you to select your state. After you have done that, there is a dropdown menu for you to select your county, and then a dropdown menu of the various Census tract numbers in the county. Select the Census Tract number you have found for the street address. Keep clicking on the Census Tract number until you see that it registers at the bottom page as “Selected Geographies.” You have to keep clicking on it until it shows up there. After your Census tract shows up next to “Selected Geographies” at the bottom of the page, go up to the top of the page and click on the data set you selected “2018: ACS 5-Year Estimates Subject Tables”. A table will appear showing the total population of the Census Tract, the population for whom poverty status is determined, below poverty level, and percent below poverty level.

Not every area in the OTSA is eligible, just as it is not every Census tract, or county in the country, but rather every OTSA that has a poverty rate of at least twenty-five percent (25%). The OTSA’s poverty rates may or may not have a Native American poverty rate of over twenty-five percent

(25%). Each OTSA poverty rate will have to be determined on an individual, case-by-case basis.

Applicant Statement

The applicant statement may be used in limited circumstances to document low-income for applicants, when income is not verifiable for the six (6) months prior to the enrollment date or when obtaining the acceptable source documentation will cause undue hardship for the individual (i.e., natural disasters, domestic violence, etc.). An applicant statement is to be used only after all practicable attempts to secure documentation have failed. The applicant's statement must:

- Explain all missing pay stubs and non-working periods during the last six months,
- Indicate the resources relied upon for support during the last six months,
- Be supported with a detailed statement documenting all attempts to secure the listed source documentation,
- Be supported by a corroborative contact or reliable witness signature attesting to the accuracy of the statement,
- Be signed by the participant, reliable witness, and case manager; and
- Be uploaded into the participant's file in the virtual case management system.

Program Enrollment

Program enrollment is the point at which collection of information used in performance reporting begins. All applicable demographic information pertaining to a program participant must be accurately entered in the virtual case management system. The demographic information entered will generate potential eligibility and allow enrollment into appropriate programs. When enrollment is complete, a snapshot of the demographic information will exist in program enrollment. The information in the snapshot will remain unchanged throughout program participation. During initial assessment, these characteristics MUST be reviewed by a case manager, in conjunction with the applicant, and will be verified by the applicant via virtual self-attestation. Only the characteristics used to qualify youth as eligible for WIOA program enrollment will require appropriate documentation uploaded to the virtual case management system, except for those allowed attested which are noted in Data Validation and Source Documentation Requirements policy at <https://www.greencountryworks.org/resources/policy-research- best-practices/>.

Assessments

For all assessments given to a participant, the GCWDB service provider must use basic skills assessment instruments and occupational skill levels determination, diagnostic testing and other assessment tools that are valid and appropriate for the target population, providing reasonable accommodation in the assessment process, if necessary, for individuals with disabilities. Any formalized testing used must be appropriate, fair, cost effective, well-matched to the test administrator's qualifications, and be easy to administer and interpret results. Skills related gains may be determined through less formal alternative assessment techniques such as observation, interviews, and evaluations.

Initial Assessment

An initial assessment is a basic career service made available to all individuals through the AJC network and includes a review of demographic information entered into the virtual case management system and pre- determination of programs for which the individual may be

eligible.

The initial assessment should include:

- A review of prior workforce program enrollments and/or services, and includes;
- A basic assessment of skill levels including literacy, numeracy, and English language proficiency,
 - A statement that the participant is not basic skills deficient based on graduating high school and case manager observation, or
 - A statement that the participant is basic skills deficient based on case manager observation or participant interview, and include the test given to determine level of deficiency, date test given, and results of test given.
- Preferred language,
- Preferred mode of contact (phone call, text message, e-mail, social media, etc.)
- Interests,
- Aptitudes,
- Abilities,
- Work history,
- Educational attainment,
- Skills as proclaimed by participant,
- Skills gaps,
- Barriers,
- Participant needs and possible supportive services, in part determined by an applicant's budget, to determine the level of services needed by the customer, and, when serving youth, contribute findings to the objective assessment. The use of techniques such as observation, interviews and evaluations are appropriate initial assessment tools. The selection and use of English language proficiency assessment tools, and qualified administrators of such tools, are to be determined by the local area and must be appropriate to the individual receiving the assessment. When an NRS approved assessment is necessary, GCWDB provides the CASAS to be administered by trained service provider staff.

The initial assessment should result in a determination of the individual's next steps. Next steps may include but are not limited to:

- A detailed, objective assessment,
- Determination of appropriate program enrollment or co-enrollments,
- Enrollment request to service provider supervisor,
- The development of an ISS,
- The provision of training or education services, and
- Appropriate referrals based on assessments using Referral to Partner or Community Resource available at <https://www.greencountryworks.org/resources/policy-research-best-practices/>.

Initial Assessment Case Note:

The initial case note is a singular note intended to identify all relevant data items captured at enrollment. It is required to follow the GCWDB DVSDR policy at <https://www.greencountryworks.org/resources/policy-research-best-practices/>. Case note elements include:

- Date Verified – Identify the date that the information collected in this note was validated

- Program – Identify the program(s) that the participant is being enrolled into
- Eligibility – Identify the eligibility documentation & criteria to support the participant’s program
Example:
 - Eligibility –OSY or ISY
 - Age – birth certificate, government issued photo ID
 - ETW – photo ID & Social Security Card, Selective Service letter
 - Elements – youth meets one of the fourteen (14) elements, assessment, third-party statement or affidavit
 - Barrier – parenting youth – validated with child’s birth certificate
 - School Status – not attending school – validate with HS diploma
 - OSY with High school diploma
 - Area of interest
- Employment Status – identify current employer or previous employer, if unemployed, last date of employment, and how this was verified.
- Wage Status – identify current wage or previous wage, if unemployed
- Veteran Status – identify if the participant is a veteran – validation typically using a DD-214
- Family Size – identify the number of persons in the participant’s family. Family is defined in 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
- Low-Income – identify if participant is low-income and supporting documentation used to validate low-income status
- All barriers identified during assessment
- Coordination of Resources – identify any resources the participant is receiving (i.e., partner services, TANF, SNAP, SSI, etc.). If none, state that participant is not receiving any assistance. They should also check to ensure no services are available for that client through any partners using the Referral to Partner or Community Resource available at <https://www.greencountryworks.org/resources/policy-research-best-practices/>.
- Assessment Results – identify the participant’s assessment results and review with participant
- Employment Goal or Career Pathway – identify participant’s employment goal or career pathway
- Education Summary – identify participant’s education history and highest level of educational attainment
- Summary of Needs/Barriers – identify any needs/barriers expressed by the participant (homeless, justice system involvement, etc.). All barriers will be documented and addressed in the ISS
- Client Involvement Statement Date – identify date participant reviewed their ISS, signed their Client Involvement Statement (virtual or paper), and received a copy of their ISS. The date of uploaded Client Involvement Statement (paper) or program note (virtual) should match their signature date
- Referrals – identify if referrals are made using the Referral to Partner or Community Resource available at <https://www.greencountryworks.org/resources/policy-research-best-practices/>

- If self-attestation is used to document eligibility, the case note must clearly state why and what it is being used for
- Next Steps – instructions or next steps, with date and time

Upload:

- All documents related to case note
- Youth Eligibility Form in the DVSDR policy at <https://www.greencountryworks.org/resources/policy-research-best-practices/>

S&T:

- Initial Assessment
- Eligibility Determination

Demographic Information Review

All characteristics that apply to the participant, including all barriers, must be correctly and accurately entered in the virtual case management system and self-attested to by the participant prior to each program enrollment. During initial assessment, staff must review the information with the participant as it is entered in the Universal Demographics screen and prior to the demographic snapshot, self- attestation and submitting for enrollment.

Virtual Signature (Self-Attestation)

The individual provides his/her status or information for a particular data element and then signs and dates the form acknowledging that it is true and correct. The self-attestation is completed as a virtual signature in the virtual case management system with the individual's unique username and password being used as the signature. Eligibility determination and receipt of individual career services and/or training services requires that all individuals self-attest by virtual signature in the applicable enrollment demographics before services are provided. The participant must then verify that the status is true and correct by entering their virtual signature (self-attest) in the applicable program demographics snapshot prior to receiving program eligibility. More information regarding self-attestation is found in the Data Validation and Source Documentation Requirements policy at <https://www.greencountryworks.org/resources/policy-research-best-practices/>.

Basic Skills Assessment

WIOA sec. 3(5) defines basic skills deficient, as an individual:

- Who is a youth with English reading, writing, or computing skills at or below the eighth (8th) grade level on a generally accepted standardized test, or
- Who is a youth that is unable to compute or solve problems, read, write, or speak English, at a level necessary to function on the job, in the individual's family or in society.

If it is identified that an individual is not basic skills deficient, as determined through items such as:

- The participant having a high school diploma,
 - The participant self-attesting to not being basic skills deficient, or
 - The participant identifies through interview and their ISS they are not basic skills deficient;
- then it is not necessary to conduct an NRS approved assessment as part of their initial objective assessment. In this case, case managers need to ensure that it is clearly documented in case notes the method used for determining the participant was not basic skills deficient at enrollment.

Sample case notes might look like:

- Participant completed CASAS and results were uploaded. Participant will attend Adult Basic Education to improve reading and math skills. Case manager and participant completed a supportive service needs inventory. Participant loves animals and would like to get training or a job working with animals.
- Participant identified that they were not basic skills deficient through their initial assessment and self-attestation; this is further confirmed by their having a high school diploma. Participant also requested no assistance with basic reading or math skills while developing their ISS. Participant likes working with people and would like to become a nurse.

Case managers must conduct NRS approved assessments for youth participants who indicate directly, or through other observations that they may be basic skills deficient; such as for clients:

- Who do not have a high school diploma at enrollment,
- Who are on an Individualized Education Program (IEP),
- Who were on an IEP while in-school,
- Who identify in their self-attestations as needing assistance with reading or math, or
- Who appear to struggle with completing reading or math portions of basic assessments, such as Career Clusters or a simple personal budget.

This list is not exhaustive.

In summary, an NRS approved assessment is not required for all youth enrollments; and the need for such an assessment is dependent on a participant's expressed or observed need. TEGL 21-16 notes: "There are limited instances where WIOA youth funds may be expended on costs related to individuals who are not yet participants in the WIOA youth program." Among those instances are "assessment for eligibility determination (such as assessing basic skills level) prior to eligibility determination." Furthermore, a prior NRS approved assessment completed in the last six months must be used whenever possible. If a partner assessment is not being used, the CASAS is provided by GCWDB for use.

Educational Functioning Level (EFL) Gain Assessment

When measuring EFL gains after program enrollment under the measurable skill gains indicator, WIOA requires standardized assessment for accountability in documenting client educational gains that are aligned with the NRS EFL's. EFL gains are key indicators of program performance and success in preparing WIOA participants for training, postsecondary education opportunities, gainful employment, and economic self-sufficiency. EFL measures are defined by the participant's ability to perform literacy-related tasks in the specific skill areas of reading, math and speaking. The NRS EFL of a student is measured by scale scores on NRS approved standardized assessments. (See Scale Score Ranges for NRS Educational Functioning Levels and NRS Testing Benchmarks [Attachments A and B] for further information.) An EFL gain also provides the opportunity to enter a measurable skills gain in the virtual case management system.

A process which allows for comparability across programs within the state in order to provide fair and equitable access to services for individual learners, collect consistent data regarding learner placement and advancement, and maintain accurate data for program planning, improvement, and accountability is required. Consistency cross WIOA funded programs in the state is crucial for determining the instructional needs of individual learners, determining the effectiveness of

instruction through learner gains, and providing information regarding local program and/or statewide professional development needs.

The approved assessments for EFL gains are:

- Test of Adult Basic Education (TABE) – Adult Basic Education (ABE) Reading, Language, Mathematics Skills
- TABE Complete Language Assessment System – English (CLAS-E) – English Language Learners (ELL) Reading, Listening, Writing, and Speaking Skills
- CASAS – Adult Basic Education Reading and Math; English as a Second Language.
- Basic English Skills Test (BEST) Literacy 2008 – ELL Reading and Writing Skills
- BEST Plus 2.0 – ELL Speaking and Listening Skills

To ensure valid results, individuals administering these assessments will follow all assessment administration and scoring guidelines established by the publishers.

- The TABE and CASAS are appropriate for assessing all ABE levels
- TABE CLAS-E, CASAS (Forms 27, 28, 081-088, 513, 514), BEST Plus 2.0, and BEST Literacy are appropriate for assessing ESL levels.
- The TABE Locator and CASAS Appraisal tests should be administered first and used to determine the appropriate Education Level to administer in each subject area. Individual learners unable to complete the TABE Locator Test will be administered the TABE Literacy Level (L) Test. Level L is not approved to measure learning gain.
- Different Forms of the same Level of the TABE and CASAS will be used for the pre- and post-assessments. Example: If a student is pre-assessed using TABE Form 11, Level M, they would then be post-assessed using TABE Form 12, Level M.
- TABE 9/10 should never be mixed with TABE 11/12. Students tested in TABE 9 should be assessed TABE 10. TABE 11 should be paired with TABE 12 only.

An individual's lowest scale score will be used for placement in an EFL and to document learning gains in accordance with NRS guidelines. If this is not the case, written documentation should be placed in the individual's file explaining why the lowest scale score subject area is not being tracked for learning gain. Subject area scores to be used for measuring individual learner gain include reading, total math, or language are located in Scale Score Ranges for NRS Educational Functioning Levels (Attachment A).

Basic Skills Pre-Assessment:

A basic skills pre-assessment should assess the individual learner in the areas that are the focus of instruction, using an appropriate standardized test. If a participant does not have an NRS approved EFL dated within the last six months from a partner entity, a pre-assessment should be completed immediately and not longer than within 3 days of enrollment. Pre-assessment scores must be documented in the virtual case management system in the enrollment details testing screen once the assessment is provided and the measurable skills gain is entered into the system. Documentation must be noted in the participant's ISS and must be uploaded in the applicable enrollment.

Basic Skills Post-Assessment:

If a participant is pre-assessed for the measurable skills gain EFL performance measure the participant must receive the appropriate instructional hours before the participant may be post-assessed according to the following NRS-approved publisher guidelines:

- TABE 9/10 – Entry Levels 1-4: Minimum 40 hours of instruction (50-60 recommended)
- TABE 9/10 – Entry Levels 5-6: Minimum 30 hours of instruction (30-59 recommended)
- TABE 11/12* – Entry Levels 1-6: Minimum 40 hours of instruction (50-60 recommended)
- CASAS – Levels A – D: Minimum 40 hours of instruction (70-100 recommended)
- TABE – CLAS-E: Minimum 50 hours of instruction (60-95 recommended)
- BEST Plus 2.0 Minimum 60 hours of instruction (80-100 recommended)
- BEST Literacy Minimum 60 hours of instruction (80-100 recommended)

* Based on the test publisher recommendations and to avoid a possible “practice effect,” the same TABE Form (11 or 12) should not be administered to a participant more often than every six months or 120 instructional hours.

If a participant exits the program without taking a post-assessment, a new assessment should be administered to determine EFL and no EFL may be obtained without the minimum hours of instruction requirement.

Post-assessment scores can only be documented in the virtual case management system once the required number of instruction hours have been completed and documented. Documentation must be noted in the participant’s ISS, uploaded in the applicable enrollment and results recorded in appropriate testing screens.

EFL Case Note(s):

A case note must be entered when a pre or post-test is given or obtained from a partner.

- Includes the type of test (pre or post)
- Includes the name of the test (CASAS, TABE)
- Includes if gains were earned

Upload:

- Test results

Objective Assessment

An objective assessment is a pre-enrollment activity required to be provided to each title I youth per section 129 (c)(1)(A) of WIOA. The assessment must include a review of the youth’s academic levels, skill levels, and service needs of the individual, which includes a review of basic skills, occupational skills, prior work experience, employability, interests, aptitudes, supportive service needs, and developmental needs. The assessment must also consider the youth’s strengths, motivations, assets, and unique personality rather than just focusing on areas that need improvement. The purpose of the objective assessment is to identify appropriate services and career pathways that are supported by the assessment and appropriate for the individual youth participant. All information must be incorporated into the youth’s ISS.

For purposes of the basic skills assessment portion of the objective assessment, local programs are not required to use assessments approved for use in the USDE’s NRS, nor are they required to determine an individual’s grade level equivalent or educational functional level (EFL), although use of these tools is permitted. Previous basic skills assessments that have been conducted within the

past six months must be used if available. This may include assessments completed by a secondary school, Vocational Rehabilitation, Adult Basic and Literacy Education, or other education or training providers.

Objective assessment includes a review of:

- The participant's motivation for seeking WIOA services;
 - Basic Skills;
 - Occupational Skills;
- Some sources for quality occupational skills assessments include:
- <https://www.careeronestop.org/Toolkit/Skills/skills-matcher.aspx>,
 - Armed Services Vocational Aptitude Battery (ASVAB),
 - Work Keys or Key Train.
- Prior Work Experience;
 - This could be a great time to create a work history document with a participant that will serve them for years to come. Stored in a digital format, a work history document chronicles work history including begin and end dates, contact information, name and title for reference requests, website, job duties, equipment operated, and for youth may appropriately contain: clubs, school activities, volunteer experiences, ROTC, non-profit and tax-exempt organization activities, or groups. Storing the document digitally and forwarding it to the participant provides an electronic record the participant can manipulate and update throughout their career.
 - Employability;
 - <https://www.truity.com/test/type-finder-personality-test-new>
 - Interests;
 - Career Clusters at <https://www.onetonline.org/find/career>, or <https://cte.careertech.org/sites/default/files/StudentInterestSurvey-English.pdf> or <https://www.okcareertech.org/educators/career-clusters>,
 - Interview
 - <https://www.careeronestop.org/ExploreCareers/Assessments/interests.aspx>,
 - <https://www.mynextmove.org/explore/ip>
 - Aptitudes;
 - <https://www.truity.com/test/type-finder-personality-test-new>
 - Assets;
 - Supportive Service Needs; and
 - Developmental needs to identify employment barriers,
 - https://www.mindtools.com/pages/article/newTMC_05_1.htm
 - Motivations;
 - Appropriate Employment Goals
 - Career Clusters at <https://www.onetonline.org/find/career>, or <https://cte.careertech.org/sites/default/files/StudentInterestSurvey-English.pdf> or <https://www.okcareertech.org/educators/career-clusters>,
 - <https://www.careeronestop.org/toolkit/careers/interest-assessment.aspx>,
 - <https://www.mynextmove.org/explore/ip>,
 - <https://www.asvabprogram.com/>,
 - The use of in-depth interviewing and evaluations are appropriate assessment tools.

Objective assessment must include:

- A statement that lists results from an interest assessment.
- A statement that links the participant's interests and skills listed in the initial assessment to the results of the interest assessment.
- A statement that lists what motivates the participant, and why the participant is seeking WIOA services.
- A statement that the case manager is going to set the participant up in a WEX (Work Experience) that is in line with the participant's interests based on assessments to see if that participant wants to continue in that direction.

GCWDB can develop and provide an Interview Tool upon request, which may assist service provider staff in conducting a thorough interview. This tool is for use by service provider staff only and is an optional guide for use during the comprehensive interview process. This tool is not to be submitted to a potential participant for completion and is not an application to any program.

Objective Assessment Case Note:

- Includes a review of occupational skills, basic skills, prior work experience, employability, interest, aptitudes, and developmental needs
- Includes identification of skills the client already has and how they will be considered in the ISS
- Identify assessments used to determine the ISS
- Address academic levels, skill levels, and service needs

Upload:

- All documents related to the detailed case note

S&T:

- Objective Assessment

Skill and Career Assessment

A career assessment is an individualized career service that is provided to an individual after it has been determined that services are required to retain or obtain employment. This assessment will identify the service needs, academic levels, goals, interests, skill levels, abilities, aptitudes, supportive service needs, and measures barriers and strengths of the individual. It includes a review of basic and occupational skills, prior work experience, employability potential, interests, aptitudes, supportive service needs and developmental needs. The purpose of the assessment is to identify appropriate services and career pathways that are appropriate for the individual and all information must be incorporated into a youth's ISS. Career assessment must include:

- A statement that the case manager has determined that the participant needs WIOA services to obtain and/or retain employment.
- A statement reflecting factors that affect employability.
- A statement that lists the results from a career assessment.
- A Statement that links the participant's interests and skills from the initial assessment and objective assessment to the results of the career cluster.
- A statement that shows skills obtained from prior work experience and/or training to the interest and job results assessments given.
- A statement that the case manager assigned Pathful Explore a.k.a Virtual Job Shadow Videos to

the participant that are in a career pathway with the results of My Next Move and Career Cluster.

- A statement that the case manager and the participant discussed the top results of the Career Assessment and that the participant is excited to start their training in that field.

Skill and Career Assessment Case Note:

All findings from career assessment

Upload:

- Formalized assessment results

S&T:

- Career Assessment

ISS

The design framework services of local youth programs must include an ISS designed for youth, which is jointly developed by the youth and the case manager. Each participant's plan is entered by choosing "Individual Service Strategy" in the Enrollment Details section of WIOA Program Details, WIOA Enrollments and the appropriate program. The initial development of an ISS will identify where the participant currently is, where the client wants to be, and the appropriate mix and sequence of services and support to meet needs and overcome all barriers indicated in the virtual case management system Demographic Snapshot to reach a realistic employment goal or begin a career pathway. Updates to the ISS are required when there are changes to the employment goal(s), the training goal, and/or services necessary to remove barriers and achieve the goals listed in the ISS. The ISS must:

- Be based on the individual needs of the youth participant;
- Be directly linked to one or more indicators of performance described below:
 - Employment Rate – 2nd Quarter After Exit;
 - Employment Rate – 4th Quarter After Exit;
 - Median Earnings – 2nd Quarter After Exit;
 - Credential Attainment;
 - Measurable Skill Gains; and
 - Effectiveness in Serving Employers.
- Identify career pathways that include education and employment goals;
- Consider career planning and the results of the objective assessment;
- Prescribe achievement objectives and services for the participant.

The ISS includes the fourteen (14) components below, and are further described in The Virtual Case Management System Virtual IEP/ISS, Attachment G.

1. Comprehensive Assessment & Career Research.
2. Employment Goals & Achievement Objectives.
3. Training Goals.
4. Client Strengths and Attributes.
5. Combination of Services to Overcome Needs and all Barriers.
6. Assistive Technology Needs for Achieving Goals
7. Client Responsibilities and Agency Responsibilities.
8. Economic Need Statement and Planning.

9. Supportive Service Needs.
10. Follow-up Services Planned.
11. Performance Goals & Accountability Indicators.
12. Client Progress Review.
13. Additional Notes.
14. Client Involvement Statement.

The initial development of the ISS requires entries in the virtual case management system for components one (1) through eleven (11) and component thirteen (13). However, the initial entry for Supportive Service Needs (component nine [9]) may, for example, be a statement that the participant has indicated they currently have no supportive service needs, and the topic will be reviewed during future contacts. Additionally, an entry of not applicable (N/A) may be entered in a section that does not pertain to the individual. For example, N/A may be entered when there are no Assistive Technology Needs (component ten [10]), or when Additional Notes (component thirteen [13]) are not vital to the initial ISS.

Client Progress Review

Progress reviews of the ISS goals must be documented in component twelve (12) of the ISS, Client Progress Review. The ISS must be reviewed on a regular basis, no less than quarterly, and may be reviewed more frequently as determined necessary by GCWDB. Progress reviews of the ISS must be conducted at least every thirty (30) days in person for active participants. If a youth is unable to meet the case manager at the case manager's public location, the case manager must meet the participant at another agreed upon public location. Additional contact for reviews may be made by phone, text messaging, mail, email, office or on-site visits or other available media. Reviews will focus on progress in the training program, progress towards the employment goal, supportive service needs and any personal needs related to the achievement of the employment goal.

The Client Involvement Statement

The final component of the ISS is a signed virtual or paper Client Involvement Statement. The participant must agree to the employment goal(s), achievement objectives, and combination of services listed in their ISS, and virtually sign the Client Involvement Statement upon development. When the ISS/Client Involvement Statement is signed virtually, it must be addressed in the participant's program notes. In the event of virtual services being rendered with the participant or case manager off site, the Client Involvement Statement in the Data Validation and Source Documentation Requirements policy at <https://www.greencountryworks.org/resources/policy-research-best-practices/> may be used.

The ISS must be amended when necessary to reflect any deviations from the initial ISS. Changes to the ISS do not require a new virtual signature unless there is a change in the training or employment goals, achievement objectives, or the combination of services to be provided. Case management updates do not require a new client involvement statement. If a participant has completed the last service in the ISS and enters follow-up, but later determines that they need additional services beyond the five elements allowed in follow-up and is scheduled to exit in ninety (90) days; the ISS may be revised, and additional services added to keep the participant from exiting.

ISS Case Note(s) must:

- Include statements that detail progress in meeting objectives, changes in training/educational needs or employment goals, accomplishments, and setbacks.
- Document a connection to the applicable performance and/or outcomes.
- Include details of all modifications to the ISS explaining why the modification occurred.

The client must be provided with a copy of the ISS at enrollment and when modifications are made.

ISS Case Note regarding Progress Review additional information:

- The date the review was conducted in the event the note is not entered into the virtual case management system on the date the actual periodic review was conducted, as the system will automatically refer to the date that the note is entered. The note must be entered into the system no less than 48 hours after the review, with the exception of weekends, holidays, closures, sick days, or other unforeseeable events that would prevent a note entry within forty-eight (48) hours.
- If the case manager is unable to reach the participant for routine progress review updates or the participant does not follow-up, the case manager must document each contact attempt/lack of follow-up in a case note. The case manager must exhaust all sources of contact, including alternate contacts, as part of the progress review process.

Upload:

- Individual Service Strategy (ISS) Client Involvement Statement (in the GCWDB DVSDR policy at <https://www.greencountryworks.org/resources/policy-research-best-practices/>)

S&T:

- ISS

Participation in at least 1 of the 14 Program Elements

WIOA includes fourteen (14) program elements. All elements must be included in the WIOA Youth program design. Although these program elements must be made available to all eligible youth participants between the ages of fourteen (14) through twenty-four (24), not all elements must be funded with WIOA youth funds. Also, GCWDB service provider has the discretion to determine which elements to provide to a participant based on the participant's assessment results and ISS. Receipt of program elements is critical to ensure that youth who are actively participating in programs are not exited due to ninety (90) days of no service. All fourteen (14) WIOA youth program elements are contained in the PIRL and GCWDB youth programs should ensure that services received are reported in the applicable program element in the PIRL.

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

Element 1 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 focuses 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.

Resources for study skills training include:

- <https://www.howtostudy.org/index.php>
- <https://www.testtakingtips.com/study/index.htm>
- <https://www.mometrix.com/academy/test-anxiety-tips/>
- <https://www.test-preparation.ca/>
- <https://www.recordnations.com/articles/record-keeping-students/>

This is not an exhaustive list.

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 2 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 3 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 is, 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 GCWDB youth funds to be expended on work experience. Please note that:

- GCWDB administrative funds are not subject to the twenty (20%) requirement; and
- Leveraged resources cannot count toward the twenty (20%).

Work experience 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 education component, or such components may be provided separately in the classroom or through other means;
- GCWDB service provider has the flexibility to decide who provides the education component;
- The occupational education component can be provided by the Work Experience Employer when it is identified in the Trainee Work Plan and addressed in the Trainee Evaluation;
- 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;
- The academic component can be provided by the Occupational Skills Training Provider when identified in the ISS and the occupational education component can be provided by the Work Experience Employer when it is identified in the Trainee Work Plan and addressed in the Trainee Evaluation. The ISS and a program note should identify how the academic component from OSY and occupational educational component from WEX add to the employability of the participant;
- GCWDB service provider has 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.

Every individual enrolled in WIOA youth must be offered a work experience. Instructions for WEX are found at <https://www.greencountryworks.org/resources/policy-research-best-practices/>.

WEX Case Note:

- Outreach efforts utilized to develop WEX opportunities with potential employers
- Duration, start and end dates, total hours
- The name of the employer, job site, supervisor, and any supports necessary
- The participant's job title
- The participant's progress, challenges or issues identified by the employer with the resulting plan of action and all services provided to the participant and/or employer during the WEX
- The reason a participant exits a WEX prior to the anticipated completion date. Case notes should reflect the reason for the early termination from the participant's perspective, as well as information received from the employer to develop the next steps in the participant's employment plan.
- Terminations or dropped from activities with reasons why
- Intent of the WEX and alignment with the ISS, rationale for selection, and identify the academic and/or occupational educational component(s) that are being met
- Address the assessment that determined that the participant was lacking in employability skills, work plan, skill development, work readiness skills, paid/unpaid
- Indicate which category the work experience aligns with:
 - Summer employment opportunity
 - Pre-apprenticeship program
 - Internship and job shadowing
 - On-the-job training
 - Regular non-summer employment opportunity
- How WEX connects fourteen (14) elements
- All documents necessary for processing the WEX must be outlined

Upload:

- All documents required for WEX
- All documents included in case note

S&T:

- Work Experience Service

Program Element 4: Occupational Skills Training (OST)

Element 4 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. GCWDB must select training programs that lead to recognized postsecondary credentials that align with in-demand industry sectors or occupations in GCWDA. GCWDB has determined the in-demand occupations and industry sectors for the GCWDA which may be viewed by clicking the Demand Occupations List available at <https://www.greencountryworks.org/resources/policy-research-best-practices/>.

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.

USDOL and the State allow WIOA Individual Training Accounts (ITA's) for OSY, ages sixteen (16) to twenty-four (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 (ETPL). However, USDOL prohibits the use of youth program funded ITAs for ISY. ISY between the ages of eighteen (18) and twenty-one (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. Instructions for ITAs are found at <https://www.greencountryworks.org/resources/policy-research-best-practices/>.

The State allows competitive procurement of ISY OST. The process is detailed in Competitive Procurement (Attachment D). This process is also supported by the USDOL National Office.

Science Technology Engineering Math (STEM) Training

Some of the measures of contract performance for GCWDB's service provider are the measures defined as the projected cumulative [WIOA Title I] participant service level for "Receiving Occupational Training" and "Receiving a Credential" which are designed to support entry into a STEM occupation. The GCWDB wants the service provider to promote and encourage participants to enter STEM occupations. The GCWDB service provider is responsible for career counseling and training geared toward introduction and identification of STEM occupations with eligible program participants. GCWDB has developed our own definition of a STEM Occupation. There are two parts:

1. An occupation that is classified as STEM in the O*Net Online database: <https://www.onetonline.org/find/stem>
2. An occupation that is otherwise recognized by GCWDB as a STEM occupation.

A complete list of STEM Occupations appears in STEM Occupations (Attachment E).

OST Case Note(s):

- Identify how the selected training program supports the results of the participant's assessment.
- Include a statement that the participant's desired occupational goal is a demand occupation as confirmed by the GCWDB Demand Occupations list.
- Explain the method of funding the training. Include a statement for the other sources of grants that are available to pay for training costs, such as Temporary Assistance for Needy Families (TANF), State-funded training funds, education grants, and Federal Pell-Grants, and how WIOA funds supplement these sources of training grants.
- Provide information regarding defaulted student loans.
- Provide detailed information for the Individual Training Account (ITA) – approval of training must identify the type of program (area of study), the cost, Coordination of Training Funds (COTF), unmet need, the credential type, and the anticipated start and end date. The case note should include any identified needs or complications and convey the status of all check requests and payments charged to the ITA.
- Include all training progress/updates during the training (e.g., attendance, grades, challenges, successes);
- Date training was completed and outcome.

- Document when a certificate, credential, degree, diploma, or General Education Development (GED) is attained.
- Note how training connects to fourteen (14) elements.

Upload:

- All documents necessary for ITA
- All documents included in case note

S&T:

- ITA Established
- Occupational Skills Training

* For further guidance on Occupational Skills Training Service Status Definitions and Reporting Accuracy see OOWD [TA-03-2020](#).

The “Educational Grants” section of the virtual case management system must be completed with the ITA information and other federal or state grants or aid provided, any financial aid provided by the training institution, and any other financial aid provided by other sources not previously mentioned.

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

Element 5 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.

The three components above all fit under different WIOA youth program elements and are only counted here under Element 5 if they occur concurrently as part of an IET model.

Program Element 6: Leadership Development Opportunities

Element 6 includes opportunities that encourage responsibility, confidence, employability, self-determination, and other positive social behaviors such as:

- Exposure to postsecondary educational possibilities;
 - Introduction to CareerTech, colleges and universities,
 - OJT, RA, Internship opportunities,
 - Assistance to sign up for tours, orientations, etc.,
- Community and service-learning projects;
- Peer-centered activities, including peer mentoring and tutoring;
- Organizational and teamwork 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;
 - through non-profits, clubs, faith-based organizations, community organizations such as:

Senior Citizen Centers, libraries, economic development entities, chambers of commerce, Main Street programs, tourism entities, parks, and recreation departments; and

- Activities that place youth in a leadership role such as serving on GCWDB's Youth Committee. Oklahoma Bar Association offers several resources at <https://www.okbar.org/freelegalinfo/> including "You're 18 Now" at <https://oklaw.org/resource/youre-18-now-its-your-responsibility> and available as an app at <https://www.okbar.org/yag/>.

Program Element 7: Supportive Services

Element 7 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 childcare and dependent care;
- Assistance with housing;
- Assistance with utility payments;
- Assistance with food;
- Assistance with translations;
- Assistance with educational testing;
- Reasonable accommodations for youth with disabilities;
- Legal Aid services;
- Medical and prescription 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 work and training related licenses and permits;
- Assistance with in-state job search and relocation to a new job;
- 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.

Training-related expenses that may be covered by an ITA do not count against the supportive services limit for each registered participant. ITA related training expenses may include but are not limited to assistance with the purchases of tools required for a specific course; current school admission fees, computer, and lab fees; and books and supplies.

All WIOA enrolled youth are eligible for supportive services as defined in WIOA Section 3(59). Supportive services are designed to provide a participant with the resources necessary to participate in career services and/or training services. To ensure the highest quality, most comprehensive service provision possible, supportive services funds may be utilized in coordination with career and training services provided by other partner programs and entities jointly responsible for workforce and economic development, educational, and other human resource programs. For example, title I supportive services funds may be utilized when the cost of training is borne by a workforce partner, the partner entity does not have available funds for supportive services, and the supportive services are not otherwise available from other sources.

Documentation of the details and the type(s) of supportive services provided to an individual, which entity provided the services, and why the services were necessary for the individual's participation in career or training services must be documented in the Required Supportive Services Needs section of the virtual ISS in case notes and uploads. The "other resources" must be appropriate resources with like services.

Supportive services are based on financial need and participants are not automatically entitled to supportive services.

WIOA supportive services are limited and must be coordinated with other community resources. In every instance of providing supportive services the case manager must ensure that no other resource exists or that the need is so urgent that referral to other resources would delay the provision of the support service and create a hardship to the participant. When determining if other community resources are available to cover necessary expenses it is required to show evidence of no less than three contacts with other resources including outcomes of each to be documented on the GCWDB Non-Competitive Purchase Form available at <https://www.greencountryworks.org/resources/policy-research-best-practices/>. When a participant is co-enrolled and/or receiving services from any partner programs, community-based organizations, and/or entities jointly responsible for workforce and economic development, educational, and other human resource programs, those must be contacted first. In the event another community resource is not available, a Telephone Verification form is available at <https://www.greencountryworks.org/resources/policy-research-best-practices/> and may be used to document that outcome. In the event another community resource is available, the case manager will make a referral for the participant to the resource and follow-up with the provider that the supportive service was obtained. A Referral to Partner or Community Resource form, available at <https://www.greencountryworks.org/resources/policy-research-best-practices/>, must be used to document the provision of the supportive service.

Supportive Services funded with WIOA Title I funds are funds of last resort, and when possible, must be coordinated/braided with other supportive services, career services and/or training services funded by partner programs, community-based organizations, and entities jointly responsible for workforce and economic development, educational, and other human resource programs. The separate and simultaneous provision of resources from multiple funding streams will help ensure the highest quality and most comprehensive service provision possible for individuals requiring supportive services to enable their participation in training services. The details of the coordination of services and resources must be documented in the ISS, as well as in Program Notes.

Disallowed Supportive Services

Supportive services may not be utilized to pay for expenses incurred prior to the Participant's enrollment into the WIOA program. Case manager is required to document detail in case notes in the state of Oklahoma's current online case management tool.

- Fines and penalties such as traffic violation, late finance charges, and interest payments;
- Entertainment including tips;
- Contributions or donations;
- Vehicle or mortgage payments;

- Refundable deposits;
- Alcohol or tobacco products;
- Firearms or ammunition;
- Lottery or gaming products;
- Pet food;
- Items for family members or friends;
- In state job search and relocation expenses that are paid for by the prospective employer; or
- Out of state relocation expenses.

Needs-related payments (NRP's): Currently, GCWDB does not provide NRP's due to financial limitations.

Limitations

Although there is no limit to training-related supportive services, they must be determined to be reasonable and necessary for an individual to complete training. The supportive services limit for each registered WIOA eligible Participant is \$500.00 for a lifetime, and they must be determined to be reasonable and necessary for an individual to obtain employment. The GCWDB executive director, on a case-by-case basis, has the authority to increase this limit by \$500.00. To request the additional supportive service amount, a detailed email request must be sent to the GCWDB executive director and a conference call with the case manager and their supervisor will also be completed prior to the approval. This will ensure all other avenues and resources have been thoroughly explored. All supportive documentation must be uploaded and/or input into the virtual case management system, prior to the request.

Provision

Supportive services are usually provided through a voucher system or payments made directly to a vendor (i.e., to pay for clothes, rent or utilities). A completed and current participant budget verifying that the participant does not have the financial resources to obtain the service attached to the request form must be uploaded with all supporting documents. Case managers will submit the Supportive Services Request (Attachment H) to their supervisor for approval.

The supervisor will converse with their designated staff to obtain a supportive service voucher number. The Supportive Service Voucher number must be in the following format: SS- [first 2 letters of county]- [Program Year, as ##]- [sequential number, as ###]- [A, D, or Y for Adult, Dislocated Worker, or Youth] For example, a Youth participant's Supportive Service Voucher is the 4th Supportive Service Voucher issued in Cherokee County during Program Year 2022. That Youth participant's Supportive Service Voucher number, as obtained from designated staff, would be SV-CH-22-004-Y

A Supportive Services Voucher (Attachment I) must be issued, and the case manager must be informed of the outcome of the request. Case managers must maintain a Supportive Service Tracking Tool (Attachment J) uploaded to the online system that tracks the date and type of supportive services. When uploading an updated Supportive Service Tracking Tool, do not delete the old ones. Case managers will enter all supportive services into the S&T on the date the service was provided. Supportive services will be provided within two business days. The case manager will ensure all documents are uploaded into the on-line system and documentation details are in case

notes.

Support Documentation

- For bus tickets, bus passes, or gift cards, a copy of the front and back of the card and both the participant and case manager signatures.
- For rental assistance, a copy of the current rental or lease agreement in the participant's name, with signatures.
- For assistance with car repair, a gas card or mileage reimbursement, a copy of the vehicle registration, registered in the participant's or family member's name; a copy of participant's current vehicle insurance card; a copy of the participant's valid driver licenses; and a copy of the printed estimate for repairs from the vendor. Need should be based on:
 - Other available transportation, bus, carpool, bicycle, etc.;
 - Distance from work or training to residence; and
 - Current participant supportive services budget.

All supportive services payments must have a receipt from the vendor that clearly shows the amount that was paid. If the participant loses the receipt from the vendor, the participant and the case manager must show due diligence in obtaining the receipt, sign a statement saying the participant received the supportive service and document in full detail in a case note in the on-line case file, and GCWDB staff must be notified of the situation to see if other assistance could produce a copy of the receipt.

If a participant is co-enrolled in the WIOA adult or dislocated worker programs and supportive services are being supplied by adult or dislocated worker funds, supportive services qualifying as directly related to training must be entered into the state forty percent (40%) Minimum Training Expenditure Rate Tool by the service provider. Transportation and childcare costs are specifically excluded.

Supportive Service Case Notes must include:

- Participant's request for supportive service prior to the participant's actually incurring the expenditure
- Justification for the requested service, stating the reason the service is needed and the barrier the assistance is resolving for the participant to participate in WIOA activities
- How the service connects to the fourteen (14) youth elements
- Detail that assistance is not available from other sources and outline services provider's efforts to use other relevant community resources before WIOA funds were authorized, including notation of uploaded documents as needed (i.e., phone verification, quotes, self-attestation, etc.) and the name of the person contacted from the other resource
- Identify the cost of supportive services provided and how the participant will pay these expenses in the future, including uploaded budget information
- The date the supportive services were provided
- The outcome of the supportive service

Upload:

- All documents related to the detailed case note
- Referral to Partner or Community Resource
- Supportive Services Request (Attachment H)

- Supportive Services Voucher (Attachment I)
- Supportive Services Tracking Tool (Attachment J)
- Verification of three (3) sources consulted: e-mail, written and signed statement from the partner or community resource, Non-Competitive Purchase Form, or Telephone Verification Form. Forms are available for download at <https://www.greencountryworks.org/resources/policy-research-best-practices/>.
- Paid receipt from the vendor

S&T:

- Supportive Services

Program Element 8: Adult Mentoring

Element 8 defines the timeframe for adult mentoring as lasting at least twelve (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 youth must be matched with an individual mentor and interact on a face-to-face basis.
- Mentoring may include workplace mentoring where the youth participant is matched with an employer or employee of a company.

Case managers are allowed to serve as mentors in areas where adult mentors are scarce. GCWDB provides the following links as potential resources for mentors:

- Oklahoma Mentoring Organizations list by Oklahoma Foundation for Excellence <https://www.ofe.org/oklahoma-mentoring-organizations/>
- For teacher preparation students https://www.ok.gov/octp/Professional_Development/Mentoring_PDI/index.html
- Big Brothers Big Sisters <https://bbbsok.org/>
- Oklahoma Creativity Project <https://creativeoklahoma.org/about/> link to entrepreneur mentoring program <https://creativeoklahoma.org/okemp/>
- The National Mentoring Partnership search for a local mentoring program <https://www.mentoring.org/get-involved/find-a-mentor/#zipsearch2>

This is not an exhaustive list.

Searching local news also proves to be a wealth of information on local mentoring efforts. See the following examples:

- https://www.enidnews.com/news/northwest-oklahoma-coaches-participate-in-mentoring-challenge/article_d69fa950-cf2a-11e9-a530-cb2a00950ac0.html
- https://www.swoknews.com/news/southwest-oklahomans-recognized-for-their-mentoring-work/article_4fc48d58-75bf-575b-ba86-3fe2575f8ceb.html
- <https://www.okhighered.org/newsletter/stories/2013/02-SWOSU-MentorDay.shtml>

The following link provides useful information on mentoring, programs resources for mentor training and information on becoming a mentor:

- <https://www.mentoring.org/>

Program Element 9: Follow-up services

Element 9 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 provide support and guidance after placement to facilitate sustained employment and educational achievement; advancement along a job and/or educational ladder; and personal development. Follow-up services include a broad range of activities identified as effective approaches, such as: developing a close, trusting relationship before and after job placement, providing intensive support and case management during the first part of the follow-up period, since job loss and other setbacks may occur early in the post-program time period, providing engaging activities to help young people stay connected to program staff, providing supportive services, as appropriate, and maintaining contact with employers of participants and providing the necessary support to both employers and participants to ensure that participants remain employed.

- 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, including referral to supportive services not funded by WIOA;
 - Adult Mentoring;
 - Financial Literacy Education;
 - Services that provide labor market and employment information about in-demand industry sectors or occupations available in GCWDA, such as career awareness, career counseling, or career exploration services; and
 - Activities that help youth prepare for and transition to postsecondary education or training.

Any program element other than the five (5) listed above requires re-enrollment 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 twelve (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;
 - The WIOA service provider must contact the participant a minimum of once every thirty (30) days after exit and document the contact, or attempt to contact, in a detailed case note identifying the type of contact (phone, alternative phone, email, social media, etc.). Once all types of contact have been exhausted, the WIOA case manager may request the individual be dropped from the caseload due to inability to contact and a detailed case note must be documented in the virtual case management system. Follow-up Services should begin at the point of the last youth program service even if the program exit has not occurred and must be appropriate to the needs of the individual youth and documented in the virtual case management system and entered in the service and training (S&T) plan. All acceptable source document(s) supporting follow-up services must be scanned and uploaded as needed to the appropriate program by choosing

“Enrollment” as the item type. Choose the type of documentation as “Supporting” and proceed to upload document(s).

- At the time of enrollment, youth must be informed that follow-up services will be provided for twelve (12) months following exit. If at any point in time during the program or during the twelve (12) months following exit the youth requests to opt out of follow-up services, they may do so. Youth in follow-up may receive an incentive award for 6 months for employment retention.

Follow-up Case Note:

Follow-up services are available to participants for twelve (12) months upon program completion. Follow-up activity must occur at least every thirty (30) days in person during the first through fourth quarters after exit, including employer, wage, hours, position, address, phone, contact numbers and any name changes. If a youth is unable to meet the case manager at the case manager’s public location, the case manager must meet the participant at another agreed upon public location. Refusal of follow-up services must be documented. Types of follow-up services are:

- Assistance in securing better paying jobs
- Additional career planning and counseling
- Assistance with work-related problems
- Information about additional educational or employment opportunities
- Referral to other community services
- Post-program supportive services
- Post-exit credentials and quarterly employment updates

Upload:

- Youth Follow-up Form (Attachment F)
- All documents related to the detailed case note

S&T

- Follow-up

Enter participant’s wage information in the virtual case management system under “Wages.”

Program Element 10: Comprehensive guidance and counseling

Element 10 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 GCWDB youth program or its service providers, the GCWDB youth program must coordinate with the organization it refers to in order to ensure continuity of service and using the Referral to Partner or Community Resource available at <https://www.greencountryworks.org/resources/policy-research-best-practices/>. GCWDB requires that this program element be provided by a counselor holding a certificate or licensure.

Program Element 11: Financial Literacy Education

Element 11 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.

- a) The State of Oklahoma released this resource in 2015 and it 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=PLrfmdUIWzRF2-wzQbIJaR3vVERdc3Thqk>
- b) 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 educates 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;
 - <https://www.identitytheft.gov/>
 - 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 provides 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
 - That 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.

Additional resources include:

- <https://www.oklahomamoneymatters.org/index.shtml>,
- <http://www.oklahomajumpstart.org/>,
- <https://www.federalreserveeducation.org/>,
- <https://www.consumer.ftc.gov/>,
- <https://www.consumerfinance.gov/>,
- <https://studentaid.gov/>,

- <https://www.ucango2.org/>, and many other banks offer education programs and resources, as well as professional organizations such as:
 - Oklahoma Society of CPA's at <https://www.oscpa.com/for-the-public/financial-literacy>, or
 - The American Institute of CPA's at <https://www.360financialliteracy.org/>.
- The federal government offers information and services at <https://www.usa.gov/> with links to topics such as:
- Benefits, Grants and Loans,
 - Consumer Issues, or
 - Money and Taxes.
- These lists are not exhaustive.

Program Element 12: Entrepreneurial Skills Training

Element 12 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 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.

Following are resources for entrepreneurial education:

- <https://www.sba.gov/>, and
- from the Oklahoma Creativity project <https://creativeoklahoma.org/okemp/>, plus
- <https://www.workforcegps.org/>.

This list is not exhaustive.

Program Element 13: Services that provide labor market information

Element 13 includes services that provide labor market and employment information about in-demand industry sectors or occupations available in the GCWDB, 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 (Department of Labor) 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>.

Other resources available are:

- OKCareerGuide.org at <https://okcareerguide.kuder.com/landing-page>, where youth can learn about their interests, skills, and values with researched based assessments; plan their education and career goals based on real-time assessments; and succeed by making confident career choices via career planning tools.
- Through Oklahoma Employment Security Commission (OESC)_
https://www.ok.gov/oesc/Labor_Market/index.html.
- Through OOWD Workforce Area Labor Market Briefings_
<https://oklahomaworks.gov/workforce-briefings/>.

Program Element 14: Postsecondary preparation and transition activities

Element 14 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, four (4)-year colleges and universities, and Registered Apprenticeship.

Additional services include, but are not limited to:

- Assisting youth to prepare for SAT/ACT testing;
 - https://www.powerscore.com/sat/help/content_practice_tests.cfm
 - <https://www.mometrix.com/academy/act-practice-test/>
 - <https://www.test-guide.com/free-act-practice-tests.html>
 - <http://www.act.org/content/act/en/products-and-services/the-act/test-preparation.html>
 - <https://collegereadiness.collegeboard.org/sat/k12-educators/resource-library>
- Assisting youth research, scheduling, and evaluating supportive service needs to attend college, career tech, or training provider technology tours, campus tours, informational sessions, or orientations;
- Assisting with college admission applications;
- Searching and applying for scholarships and grants;
- Filling out the proper financial aid applications, such as <https://studentaid.gov/h/apply-for-aid/fafsa>, and adhering to changing guidelines;
- Connecting youth to postsecondary education programs such as OkCollegeStart.org at <https://www.okcollegestart.org/>; and
- Connecting youth with some college to programs such as Flex Finish through Reach Higher_ <https://reachhigherok.org/>.

Stipend and Incentive

Stipend and incentive payments made to participants in the youth program are different from payments made as a supportive service. Supportive service payments may only be made when they are necessary to

enable an individual to participate in program activities. Stipend and incentive payments, on the other hand, are designed to be used as a way of recognizing achievement and rewarding participation in a program activity. Attachment L, WIOA Youth Program Stipend and Incentive Brief is provided for outreach.

When providing stipends and incentives, service providers must be mindful of the requirements of the state and federal funding sources as well as other board policies. This policy does not mandate that stipends and incentives are paid but only establishes the guidelines, minimum requirements, and procedures to be followed should the service provider decide to provide stipends and/or incentives. Stipends and incentives are provided according to funding available and should be consistent among participants. If a stipend or incentive differs from the schedule outlined in policy, a detailed program must be entered explaining the reason. Stipends and Incentives are not intended to be the only avenue to provide direct client services and service providers should use caution when implementing this policy as all stipends and incentives are to be factored into the total amount of supportive services for each youth. The maximum amount of non-training related supportive services that can be provided to an enrolled youth is \$500.

Incentive payments to youth participants are permitted for recognition and achievement directly tied to training activities and work experiences. Such incentives for achievement could include improvements marked by testing or other successful outcomes. USDOL has also clarified that incentives are not allowed for activities such as recruitment, submitting eligibility documentation, or just simply showing up for the program. You are allowed to pay incentives to WIOA ISY and OSY for milestones such as receiving a high school diploma or high school equivalency or other acceptable credentials. Also, the work experience incentive must be directly tied to the completion of work experience.

While incentive payments are allowable under WIOA, the incentives must be in compliance with the cost principles in 2 CFR part 200. For example, federal funds must not be spent on entertainment costs. Therefore, incentives must not include entertainment, such as movie or sporting event tickets or gift cards to movie theaters or other venues whose sole purpose is entertainment. Additionally, there are requirements related to internal controls to safeguard cash, which also apply to safeguarding of gift cards, which are essentially cash.

Payment Procedures

The Service providers may make incentive and/or stipend payments to eligible enrolled/active participants based on properly documented attainment of benchmarks and goals. The payment mechanisms the Service providers must adhere to include appropriate review of procedures to ensure that all stipend and/or incentive payments are made in accordance with GCWDB guidelines and any appropriate state policies and/or procedures.

Once the Service provider has verified the proper attainment benchmark(s) is achieved and documented, the service provider will enter a case clearly documenting/explaining the attainment of the benchmark and the ensuing request for stipend/incentive payment as well as the payment amounts for each. A Quick Service entry must be made in the virtual case management system for a stipend payment or an incentive payment. A Request for Stipend and Incentive form (Attachment H) for approval by their respective agency. Once approved, the form must be uploaded into the participant's file in the virtual case management system. A check or other payment mechanism will be issued as required. Proof that the participant received the payment must be uploaded into the participant's file in the virtual case management system. If the request is denied, a detailed program note explaining why it was denied must be entered.

Standard Stipend/Incentive Plan

This plan describes stipend and incentive payments that may be offered to eligible enrolled youth program participants served in GCWDA. Service providers are required to ensure all payments are made in a way to be fair to all participants within each category. Each type and benchmark should be considered a singular

service/activity with singular payment and not in combination or conjunction with another type or benchmark at a time of service.

Pathful Explore a.k.a Virtual Job Shadow Career Exploration Incentive Payment

Eligibility: any participant who completes 60 Pathful Explore a.k.a Virtual Job Shadowing videos, from Career Central in Virtual

Job Shadow, in 60 days.

Benchmark: completion of 60 Pathful Explore a.k.a Virtual Job Shadowing videos, from Career Central in Pathful Explore a.k.a Virtual Job Shadow,

in 60 days following enrollment in the youth program.

Payment: up to \$100 payable upon documented completion.

Documented by: a printed record of completion from Pathful Explore a.k.a Virtual Job Shadow verified by a case manager, case manager signature, and date, signed and uploaded.

Pathful Explore a.k.a Virtual Job Shadow Flex Lessons Incentive Payment

Eligibility: any participant who completes a Flex Lesson(s) by Pathful Explore a.k.a Virtual Job Shadow assigned by their case manager.

Benchmark: completion of a lesson(s).

Payment: up to \$50 per flex lesson and payable upon documented completion.

Documented by: a printed record of correct completion from Pathful Explore a.k.a Virtual Job Shadow verified and checked for content by a case manager, case manager signature and date signed, and uploaded

Pathful Explore a.k.a Virtual Job Shadow Mini Lesson Incentive Payment

Eligibility: any participant who completes a lesson(s) assigned by their case manager.

Benchmark: completion of a lesson(s).

Payment: based on lessons defined and schedule as follows and payable upon documented completion.

- Self-Discovery including: Long and Short-Term Goals, Setting SMART Goals, Determine Your Personal Goals up to \$100.00
- Employability Soft Skills including: Verbal Communication, Written Communication, Personal Development Essay up to \$100.00
- Time Management including: What is Time Management, Self-Management & Independence up to \$100
- Team Building including: Relationship Building, Teamwork and Collaboration up to \$100
- College & Career Research including: Job Shadowing, Internships, A Summer Job Guideline for Teens, How to Pick a College Major, Personal Essay up to \$100
- Land the Job including: Resume Preparation, Composing an Effective Cover Letter, Asking for Recommendations and Securing References, Job Applications 101, Maintaining a Professional Appearance, Honing Your Interview Skills, and including completion of a resume that includes three references consisting of name, company, title, address, e-mail, phone, relationship, and years acquainted all verified good references by a case manager with any poor references replaced, and a cover letter for application to a targeted Work Experience up to \$250
- Financial Literacy including: Budgeting Basics Part I, Budgeting Basics Part II, Checking and Savings Part I: Opening Your Accounts, Checking and Savings Part II: Using Your Accounts, Credit Basics, and including completion the Shared Flex Lesson, Becoming Familiar with Your Financial Life a budget, up to \$250

Documented by: a printed record of correct completion from Pathful Explore a.k.a Virtual Job Shadow verified by a case

manager, case manager signature and date signed, and uploaded.

Post-Secondary School Enrollment Incentive Payment

Eligibility: Any participant who is enrolled in a recognized post-secondary school who was not already enrolled in a recognized post-secondary school at the date of WIOA Title I youth program participation.

Benchmark: successful completion of a semester/trimester of post-secondary school at full-time status for one calendar year.

Payment: up to \$50.00 per semester/trimester, payable at the end of each semester/trimester after enrollment into the WIOA Program and at the end of each semester/trimester thereafter. This incentive is not available to students who enroll in a short-term training project (less than one semester in length) which does not result in a credential/certificate.

Documented by: post-secondary school enrollment paperwork as well as a progress report from the school, attendance records, and grade reports (Participant must provide the original document. After review, a copy of the original will be uploaded).

Attainment of High School Diploma Incentive Payment

Eligibility: any participant who has not yet completed a high school diploma or the High School Equivalency certificate (GED) at the time of enrollment into WIOA Title I youth program.

Benchmark: receipt of a high school diploma or its equivalent.

Payment: up to \$200, payable upon the documented attainment of a high school diploma or its equivalent.

Documented by: diploma or its equivalent (Participant must provide the original document. After review by service provider staff, a copy of the original will be maintained in the participant file and uploaded).

Post-Secondary Occupational Skills Training Incentive Payment

Eligibility: any participant who is enrolled in an occupational skills training program and has completed the program that is linked to the Board's Demand Occupations whether or not the training was paid for by WIOA funds.

Benchmark: completion of a post-secondary occupational skills certificate or degree granted by a Career Tech, college, or university (including public or private schools), whether or not the training was paid for with WIOA financial assistance.

Payment: see "Type of Attainment" below for payment schedule.

Documented by: receipt of certificate or degree from training institution (Participant must provide the original document. After review by service provider staff, a copy of the original will be maintained in the participant file and uploaded).

Type of Attainment:

- Career Tech Certificate/Industry Recognized Certificate up to \$100.00
- Associates Degree up to \$200.00
- Bachelor's Degree up to \$400.00

"Demand Occupation" refers to skills training in support of an occupation that is included on the board's current official list of Demand Occupations.

Basic Skills Deficient Incentive Payment

Eligibility: Youth participants who were assessed as having a deficiency in basic skills measured by a WIOA/board approved assessment process during the objective assessment.

Benchmark Out-of-school Youth: Achievement of an increase by one or more functioning levels in reading and/or math per approved standardized test/assessment utilized in the objective assessment for basic skills until the participant is no longer basic skills deficient.

Payment: up to \$50.00 per measure per functioning level increase (Maximum up to \$200.00 in a 12-month period), payable only after verification of post-test/assessment results.

Documented by: pre-assessment/test scores and post-assessment/test using an approved standardized test or performance assessment, documented in the appropriate testing section in the online system, and

captured in case notes.

Unsubsidized Employment Incentive Payment

Eligibility: Any participant who was not employed at the date of participation. This incentive is reserved for participants who accept unsubsidized employment, which does not interfere with school attendance and which is considered employment that leads to self-sufficiency.

Benchmark: Obtaining a job or jobs that: (a) Offers a work schedule of at least thirty-two (32) hours per week; (b) Has an expected duration of at least six (6) months; and (c) Is not subsidized by any State or Federal program funding. **Payment:** up to \$100.00 (one time only) after two (2) months of work.

Documented by: Participant statement self-certifying hours per week, status/duration of job, and hourly wage accompanied by the participant's first paycheck or a hiring letter signed by the employer indicating hours per week, status/duration of job, and hourly wage. (Participant must provide the original document. After review by service provider staff, a copy of the original will be maintained in the participant file and uploaded).

Employment in a subsidized Work Experience activity/job or On-the-Job Training does not meet the qualification benchmark for this incentive.

Retention in Employment Incentive Payment

Eligibility: Any participant who entered unsubsidized employment during the period of his/her enrollment in the WIOA Youth program.

Benchmark: Successful retention in a job or jobs that: (a) Offers a work schedule of at least thirty-two (32) hours per week; and (b) Is not paid for nor subsidized by State or Federal program funding.

Payment: See schedule below. The maximum amount of cumulative payments to an individual participant is up to \$500.00

Documented by: Presentation of an employer-generated record, letter, etc., indicating hours per week and duration of job. (Participant must provide the original document. After review by Youth Provider staff, a copy of the original will be maintained in the participant file and uploaded).

Retention Period Incentive Payment Cumulative Incentive:

- 3 Months up to \$ 50.00
- 6 Months up to \$ 100.00
- 9 Months up to \$ 150.00
- 12 Months up to \$ 200.00

Employment in a subsidized Work Experience activity/job or On-the-Job Training does not meet the qualification benchmark for this incentive.

Workshops and Conferences Stipend Payment

Eligibility: Any participant who has participated in a Workshop or Conference focusing on Leadership Development or any one of the fourteen (14) Elements. To be eligible for this stipend, the agenda for the workshop or conference must reflect a length of at least two (2) hours, at least three (3) hours, or at least four (4) hours. Cannot be used in conjunction with item ten (10) Work Readiness Workshops; participants can only be paid for one of the other of these. Workshop total hours do not include breaks for lunch.

Benchmark: Successful completion of the time allotted Workshop/Conference

Documented by: a signed Attendance Record and description of the Workshop/Conference (such as an agenda, program, or brochure).

Payment: Conference Duration Stipend Payment

- 2 hours up to \$30.00 total
- 3 hours up to \$45.00 total
- 4 or more hours up to \$60.00 total

Documented by: Attendance records and detailed description of the workshop/conference, including date, time, and topic(s). The virtual case management system case note and quick service entry and any follow-up documentation (such as a written report by the participant on the workshop/conference). All documentation of workshop including all sign-in sheets, agendas, workbooks, etc. must be kept in a separate file from the participant file and must be available for review when monitored.

Summer Employment Opportunities Stipend Payment/Incentive Payment

Eligibility: Any participant who is enrolled in a summer employment opportunity subsidized employment program (whether paid for by WIOA or not) during the 'summer months' starting in May and ending in September with the emphasis on increasing work readiness skills, employability skills, life skills, soft skills, etc. The work experience portion of the program must be at least three (3) weeks in length and may include a combination of other services, programs, and workshops but **MUST** include an academic enrichment piece.

Benchmark #1: Successful completion of a work readiness class/program with an eighty-five (85%) attendance record and completion of all class assignments. Work readiness class/program should focus on increasing work readiness skills. Work readiness skills include world-of-work awareness, labor market knowledge, occupational information, values clarification and personal understanding, career planning and decision making, and job search techniques (resumes, interviews, applications, and follow-up letters). They also encompass survival/daily living skills such as using the phone, telling time, shopping, renting an apartment, opening a bank account, and using public transportation. They also include positive work habits, attitudes, and behaviors such as punctuality, regular attendance, presenting a neat appearance, getting along, and working well with others, exhibiting good conduct, following instructions, and completing tasks, accepting constructive criticism from supervisors and co-workers, showing initiative and reliability, and assuming the responsibilities involved in maintaining a job. This category also entails developing motivation and adaptability, obtaining effective coping and problem-solving skills, and acquiring an improved self-image. Cannot be used in conjunction with item eight (8) Workshops/conferences and/or eleven (11) Work Readiness Workshops; participants can only be paid for one of the other of these.

Payment: up to \$25 per evaluation reflecting a measurable skill gain.

Documented by: The virtual case management system program note, quick service entry of stipend payment, and records of attendance and completion of any classroom assignments and uploaded.

Benchmark #2: Completion of GCWDB designated staff approved Academic Enrichment workbook along with completion of the Work Experience worksite agreement (defined as not having been fired or quitting before contract estimated end date). The workbook/curriculum must provide an appropriate mix of work maturity and career exploration, basic academic skills (math, reading, writing, language, etc.), and should reinforce study skills techniques and drop-out prevention strategies as well as provide activities to develop leadership, decision making, and citizenship skills.

Payment: incentive up to \$300, max amount payable; one time only per enrollment.

Documented by: verification of workbook completion via program notes, grading of workbook, and signature page signed by staff and participant, program notes detailing career counseling conducted with participant regarding all issues and items in the workbook that were incorrect or needed addressing, attainment of worksite agreement evaluations conducted by worksite supervisor, and review of all participant time sheets for correct hours and satisfactory attendance and quick service entry of incentive payment.

Benchmark #3: Completion of Key Train assessment (not the 'pre-assessment'), any learning modules assigned, and completion of the Work Experience worksite agreement (defined as not having been fired or quitting before contract estimated end date).

Payment: incentive up to \$200 total paid to youth at completion of all assigned modules to the satisfaction of staff and completion of Work Experience

Documented by: Verification of completion of academic enrichment activities shall be through the virtual case management system Program notes as well as any progress reports (uploaded) from Key Train program documenting hours of work and progress within each module. Verification of completion of Work Experience will be review of contract and trainee plan as well as Service and Training Plan. Quick service entry of incentive payment.

Regular (non-summer) Work Experience Stipend Payment/Incentive Payment Eligibility:

Eligibility: Any participant who is enrolled in a work experience (whether paid for by WIOA or not) with the emphasis on increasing work readiness skills, employability skills, life skills, soft skills, etc. The work experience portion of the program must be 520 hours in length, may include a compilation of other services, programs, and workshops, and must include an academic component and occupational education components, addressed in the WIOA Trainee Work Plan.

Benchmark 1: Successful completion of one-third (1/3) of the total work experience with an employee evaluation showing a favorable performance rating (a measurable skill gain of the occupational educational component) and perfect punctuality and attendance.

Payment: Up to \$50.00 for the first 173 hours worked with a WIOA WEX Trainee Evaluation rating of “Good” or “Excellent” on six (6) or more items and up to \$50.00 for perfect attendance and punctuality.

Documented by: The first WIOA WEX Trainee Evaluation showing a “Good” or “Excellent” rating on six (6) or more items and perfect attendance and punctuality reflected on the WIOA Trainee Time Sheet for the first 173 hours.

Benchmark 2: Successful completion of two-thirds (2/3) of the total work experience with an employee evaluation showing a favorable performance rating (a measurable skill gain of the occupational educational component) and perfect punctuality and attendance.

Payment: Up to \$50.00 for the second 173 hours worked and a WIOA WEX Trainee Evaluation rating of “Good” or “Excellent” on eight (8) or more items, improvement on any item marked “Unsatisfactory” or “Satisfactory” from the first evaluation, and up to \$50.00 for perfect attendance and punctuality.

Documented by: The second WIOA WEX Trainee Evaluation showing a “Good” or “Excellent” rating on eight (8) or more items, improvement on any item marked “Unsatisfactory” or “Satisfactory” from the first evaluation, and perfect attendance and punctuality reflected on the WIOA Trainee Time Sheet for the second 173 hours worked.

Benchmark 3: Successful completion of 520 hours of total work experience with an employee evaluation showing a favorable performance rating (a measurable skill gain of the occupational educational component) and perfect punctuality and attendance.

Payment: Up to \$50.00 for the final 174 hours worked and a WIOA WEX Trainee Evaluation rating of “Good” or “Excellent” on ten (10) or more items, improvement on any item marked “Unsatisfactory” or “Satisfactory” from the second evaluation, and up to \$50.00 for perfect attendance and punctuality.

Documented by: The third WIOA WEX Trainee Evaluation showing a “Good” or “Excellent” rating on ten (10) or more items, improvement on any item marked “Unsatisfactory” or “Satisfactory” from the second evaluation, and perfect attendance and punctuality reflected on the WIOA Trainee Time Sheet for the final 174 hours worked.

Work Readiness Workshops Stipend Payment

Eligibility: Any participant who has participated in a Work Readiness Workshop focusing on work readiness skills prior to being placed at a work experience worksite. Work readiness class/program should focus on increasing work readiness skills. Work readiness skills include world-of-work awareness, labor market knowledge, occupational information, values clarification and personal understanding, career planning and decision making, and job search techniques (resumes, interviews, applications, and follow-up letters). They also encompass survival/daily living skills such as using the phone, telling time, shopping, renting an apartment, opening a bank account, and using public transportation. They also include positive work habits, attitudes, and behaviors such as punctuality, regular attendance, presenting a neat

appearance, getting along, and working well with others, exhibiting good conduct, following instructions, and completing tasks, accepting constructive criticism from supervisors and co-workers, showing initiative and reliability, and assuming the responsibilities involved in maintaining a job. This category also entails developing motivation and adaptability, obtaining effective coping and problem-solving skills, and acquiring an improved self-image. To be eligible for this stipend, the agenda for the workshop must reflect a length of at least two (2) hours. Cannot be used in conjunction with item 7

Workshops/conferences; participants can only be paid for one of the other of these.

Benchmark: Successful completion of the time allotted Work Readiness Workshop with evidence of a signed attendance record and description of the Work Readiness Workshop to include any related topics covered, any Q&A provided, handout materials, any follow-up documentation written report by the participant regarding the Work Readiness Workshop, evaluations, etc.) as appropriate.

Payment: up to \$10.00 per full hour of attendance (partial hours cannot be counted)

Documented by: The virtual case management system program notes, quick service entry, and attendance records and detailed description of the Workshop including agenda, related topics covered, any Q&A provided, handout materials, and any follow-up documentation (such as a written report by the participant regarding the Work Readiness Workshop, evaluations, etc.) as appropriate. Documentation uploaded.

Attaining a Career Readiness Certificate Incentive Payment

Eligibility: Any participant who has successfully completed the work keys test and scored a bronze certificate or higher. Participants are only allowed to be paid one time for this type of incentive while participating in WIOA youth programs.

Benchmark: Successfully attaining a bronze, silver, gold, or platinum Career Ready Certificate, with evidence of test scores in case files and uploaded to the virtual case management system.

Payment scale/schedule:

- Bronze Certificate up to \$10.00
- Silver Certificate up to \$50.00
- Gold Certificate up to \$100.00
- Platinum Certificate up to \$200.00

Documented by: The virtual case management program note and uploaded, participants WorkKeys testing 'receipt' or actual CRC card/Certificate.

Stipend or Incentive Payment Case Note:

Incentive payments are permitted for recognition and achievement directly tied to training activities and work experience. Case notes must indicate the following:

- Date incentive payment was requested.
- How incentives are tied to the goals of the program identified in the participant's ISS.
- The amount of the incentive payment and how the payment was made.
- How the incentive payments are connected to recognition of achievement of milestones in the program tied to work experience, education, or training. Such incentives for achievement could include improvements marked by acquisition of a credential or other successful outcomes.
- Details of the incentive payment, such as the credential obtained, the completion of a work experience, or any other successful outcome.

Upload:

- Verification of the participant's receipt of an incentive by obtaining an original signature on a receipt form.
- Stipend and Incentive Request (Attachment H)

S&T:

- Incentive Payment

Exits and Outcomes

The case manager must accurately record in the virtual case management system all services received and the end date(s) associated with all services. Case managers are required to explain and offer follow-up services; however, a participant may decline follow-up services. When the individual's the virtual case management system record indicates that no services funded by any program tracked by the system were recorded for 90 days and there is no gap in service recorded, the virtual case management system will automatically exit the individual from the WIOA program (and any other common enrollment program) recording the date of the last service received as the common exit date of all programs.

- Career managers must record in the Exit Questions screen the Other Reason for an Exit when a participant did not return to the program for ninety (90) days due to circumstances beyond their control. This screen is not available for input until the participant has exited the program. The career managers must also enter a case note recording the information about the circumstances.

Once a participant exits the program the career manager must answer all questions applicable to the participant in the Upon Exit and Job Placement section of the Exit Questions screen. Program outcomes must be answered and follow-up contact with the participant maintained so updates on the training status can be made.

- When a participant receives any Type of Recognized Educational/Occupational/Certificate /Diploma/Degree, it must be uploaded into the virtual case management system by choosing Enrollment as the item type and choosing Supporting as the Documentation type. The credential must be recorded in the virtual case management system in the Outcomes section and then select Fourth Quarter after Exit.
- Once a participant exits the program, the Upon Exit and Job Placement questions in the Exit Questions section of the virtual case management system *must* be completed. Program outcomes must be answered and follow-up contact with the participant maintained so updates on the training status can be made.
- If a participant does not return to the program for ninety (90) days due to extenuating circumstances, the Exit Questions section of the virtual case management system must be completed by selecting Other Reasons for Exit and selecting the reason from the drop-down menu. This screen is not available for input until the participant has exited the program. The case manager must also enter a case note recording the information about the circumstances.
- Once a participant exits the program, the Exit Questions section for In-School Status must be answered by selecting the applicable description in the drop-down menu.
- Employment in the second and fourth quarters after exit will be automatically captured from wage record data attained with Unemployment Insurance (UI) wage records. Supplemental wage information must also be collected and entered in the Wages section After Exit of the virtual case management system to meet this requirement.

Exit Case Note must, at minimum, contain:

- The reason for exit
- The participant employment exit information, including place of employment, number of

hours working, wage, and position

- The details of the exit in case notes, documenting all action plans, activities, and training has been completed
- The services provided and outcomes attained while in the program
- An offer of follow-up services and document any formal refusal of follow-up services
- The reason follow-up services are not planned, including but not limited to:
 - Institutionalized
 - Health/medical or family care
 - Deceased
 - Reserved forces called to active duty
 - Relocated to a mandatory program

Monitoring

The GCWDB is responsible for monitoring and oversight of local Title I programs to ensure fiscal and programmatic accountability. Monitoring will be conducted per GCWDB Monitoring policy found at <https://www.greencountryworks.org/resources/policy-research-best-practices/>.

GCWDB acknowledges that OOWD, USDOL and USDE have the authority to monitor and assess activities to ensure that federal awards are used for authorized purposes in compliance with Final Rules, federal regulations, and State and local policies, and that those laws and regulations are enforced properly, including but not limited to 20 CFR 683.400(c)(1), 683.410(b)(2), and 29 CFR 38.51. *These agencies* maintain oversight of recipient and sub-recipient compliance, including GCWDB, the Green Country One-Stop Operator, GCWDB's fiscal agent and program service provider. OOWD will conduct program, fiscal, equal opportunity and nondiscrimination, and performance/data quality on-site and desktop monitoring.

Record Retention

In accordance with CFR 627.460(a)(1), Oklahoma requires local areas and WIOA providers to retain records in the participants file and maintain the file for at least three years following the date on which the final cost report charged to a program year's allotment is submitted, or until all audit and litigation issues are resolved, whichever is later. If any litigation, claim, or audit is started before the expiration of the three-year period, the records then must be retained until all litigation, claims, or audit findings involving the records have been resolved and final action has been taken.

IV. Authorization for Clarifications and Additions

The GCWDB executive director is authorized to issue additional instructions, guidance, approvals and/or forms to further implement the requirements of this policy, without making substantive change to the policy, except in situations where new or updated state and federal guidance is issued.

V. History

- Replaced GCWDB P-0300400, Youth Program Policy, previously approved on 10/21/2021
- Replaced GCWDB P-0300500, Youth Incentive Policy, previously approved on 10/21/2021
- Replaced GCWDB P-0400200, Eligible Training Providers, previously approved on 06/17/2021
- Replaced GCWDB Youth Program Policy Approved on 12/08/2022

- Replaces GCWDB Youth Program Policy Approved on 02/09/2023
- GCWDB BD Approved and Effective 07/26/2023

VI. References

- Workforce Innovation and Opportunity Act (WIOA) (Pub. L. 113-128)
- 2 CFR part 200
- WIOA Regulations at 20 CFR part 681– Youth Activities Under Title I of the WIOA Workforce Innovation and Opportunities Act, the Federal Register/Vol. 81, No 161
- 20 CFR 627.460(a)(1)
- 20 CFR 675.300
- 20 CFR 683.400(c)(1)
- 20 CFR 683.410(b)(2)
- 29 CFR 38.51
- TEGL 10-16, Change 1
- TEGL 19-16
- TEGL 21-16
- TEGL 2-16, Change 2
- TEGL 23-14
- TEGL 38-14
- TEGL 8-15
- OWDI #06-2020, Poverty Guidelines-LLSIL
- OWDI #04-2020, Selective Service Registration
- OWDI #03-2019, Guidance for the Development of the Adult and Dislocated Worker Individual Employment Plan
- OWDI #09-2017, Change 2 Core Performance Measures Policy
- OWDI #02-2019, Data Validation Source Documentation Requirements
- OWDI #02-1016, Change 2 WIOA Title 1 Youth
- OWDI #07-2019, Grant Funds to Pay for the Cost of Meals
- OWDI #19-2017 CHANGE 1, Adult and Dislocated Worker Programs
- OWDI #08-2019 Adult and Dislocated Worker 40% Minimum Training Expenditure Rate

SCALE SCORE RANGES FOR NRS EDUCATIONAL FUNCTIONING LEVELS

TABE 9 and 10 Scale Score Ranges for NRS Educational Functioning Levels			
EFL	Reading	Total Math	Language
ABE Beginning Literacy	367 and below	313 and below	389 and below
ABE Beginning	368 – 460	314 – 441	390 – 490
ABE Low Intermediate	461 – 517	442 – 505	491 – 523
ABE High Intermediate	518 – 566	506 – 565	524 – 559
ABE Low Adult Secondary	567 – 595	566 – 594	560 – 585
ABE High Adult Secondary	596 and above	595 and above	586 and above

TABE 11 and 12 Scale Score Ranges for NRS Educational Functioning Levels			
National Reporting System Levels	Reading	Total Math	Language
ABE Beginning Literacy	300-441	300-448	300-457
ABE Beginning	442-500	449-495	458-510
ABE Low Intermediate	501-535	496-536	511-546
ABE High Intermediate	536-575	537-595	547-583
ABE Low Adult Secondary	576-616	596-656	584-630
ABE High Adult Secondary	617-800	657-800	631-800

CASAS Assessment Chart for Educational Functioning Level in Adult Basic Education (for NRS-approved Reading Goals assessments through February 2025)	
National Reporting System Levels	Reading GOALS Score Ranges
1 Beginning ABE Literacy	203 and below
2 Beginning Basic Education	204-216
3 Low Intermediate Basic Education	217-227
4 High Intermediate Basic Education	228-238
5 Low Adult Secondary Education	239-248
6 High Adult Secondary Education	249 and above

CASAS Assessment Chart for Educational Functioning Level in Adult Basic Education (for NRS-approved Math Goals assessments through March 2022)	
National Reporting System Levels	Math GOALS Score Ranges
1 Beginning ABE Literacy	193 and below
2 Beginning Basic Education	194-203
3 Low Intermediate Basic Education	204-214
4 High Intermediate Basic Education	215-225
5 Low Adult Secondary Education	226-235
6 High Adult Secondary Education	236 and above

BEST Plus 2.0 and BEST Literacy Scale Score Ranges for NRS Educational Functioning Levels		
<i>National Reporting System Levels</i>	BEST Plus 2.0	BEST Literacy 2008 Effective July 1, 2008
1 ESL Beginning Literacy	88 - 361	0 – 20
2 ESL Low Beginning	362 - 427	21 – 52
3 ESL High Beginning	428 - 452	53 – 63
4 ESL Low Intermediate	453 - 484	64 – 67
5 ESL High Intermediate	485 - 524	68 – 75
6 ESL Advanced	525 - 564	76 – 78*

TABE CLAS-E Scale Score Ranges for NRS Educational Functioning Levels							
<i>National Reporting System Levels</i>	Reading	Writing	Total Reading & Writing	Listening	Speaking	Total Listening & Speaking	SPL
1 ESL Beginning Literacy	250-392	200-396	225-394	230-389	231-425	230-407	0-1
2 ESL Low Beginning	393-436	397-445	395-441	390-437	426-460	408-449	2
3 ESL High Beginning	437-476	446-488	442-482	438-468	461-501	450-485	3
4 ESL Low Intermediate	477-508	489-520	483-514	469-514	502-536	486-525	4
5 ESL High Intermediate	509-557	521-555	515-556	515-549	537-567	526-558	5
6 ESL Advanced	558-588	556-612	557-600	550-607	568-594	559-600	6

CASAS Assessment Chart for Educational Functioning Level in English as a Second Language		
<i>Educational Functioning Level</i>	CASAS Level	Reading and Listening Score Ranges
1 Beginning ESL Literacy	A	Reading: 180 and below Listening: 162-180
2 Low Beginning ESL	A	Reading: 181-190 Listening: 181-189
3 High Beginning ESL	A	Reading: 191-200 Listening: 190-199
4 Low Intermediate ESL	B	Reading: 201-210 Listening: 200-209
5 High Intermediate ESL	B	Reading: 211-220 Listening: 210-218
6 Advanced ESL	C	Reading: Placement 221-234 Completion 235 and above Listening: Placement 219-226 Completion 227 and above



National Reporting System
for Adult Education

A Project of the U.S. Department of Education

Test Benchmarks for NRS Educational Functioning Levels

Updated August 2019

Adult Basic Education (ABE)

Educational Functioning Level (EFL)	Test Benchmarks
Beginning ABE Literacy (ABE Level 1—all subjects)	TABE¹ (11–12) scale scores (grade level 0–1): Reading: 300–441 Mathematics: 300–448 Language: 300–457 CASAS² Reading GOALS scale scores: Reading: 203 and below CASAS Math GOALS scale scores: Mathematics: 193 and below
Beginning Basic Education (ABE Level 2—all subjects)	TABE (11–12) scale scores (grade level 2–3): Reading: 442–500 Mathematics: 449–495 Language: 458–510 CASAS Reading GOALS scale scores: Reading: 204–216 CASAS Math GOALS scale scores: Mathematics: 194–203 MAPT³ scale scores: All tests: 200–299

¹ TABE = Tests of Adult Basic Education

² CASAS = Comprehensive Adult Student Assessment System

³ MAPT = Massachusetts Adult Proficiency Test

Equal Opportunity Employer/Program. Auxiliary aids and services are available upon request for individuals with disabilities.

NRS Test Benchmarks for Educational Functioning Levels

Updated August 2019

Educational Functioning Level (EFL)	Test Benchmarks
Low Intermediate Basic Education (ABE Level 3—all subjects)	TABE (11–12) scale scores (grade level 4–5): Reading: 501–535 Mathematics: 496–536 Language: 511–546 CASAS Reading GOALS scale scores: Reading: 217–227 CASAS Math GOALS scale scores: Mathematics: 204–214 MAPT scale scores: All tests: 300–399
High Intermediate Basic Education (ABE Level 4-ELA) Middle Intermediate Basic Education (ABE Level 4--Mathematics)⁴	TABE (11–12) scale scores (grade level 6–8): Reading: 536–575 Mathematics: 537–595 Language: 547–583 CASAS Reading GOALS scale scores: Reading: 228–238 CASAS Math GOALS scale scores: Mathematics: 215–225 MAPT scale scores: All tests: 400–499
Low Adult Secondary Education (ABE Level 5-ELA) High Intermediate Basic Education (ABE Level 5-Mathematics)	TABE (11–12) scale scores (grade level 9–10): Reading: 576–616 Language: 584–630 Mathematics: 596–656 CASAS Reading GOALS scale scores: Reading: 239 – 248 CASAS Math GOALS scale scores: Mathematics: 226–235 MAPT scale scores: All tests: 500–599

⁴ For mathematics, there is an additional intermediate level, Middle Intermediate (level 4), in addition to High Intermediate (level 5), and only one secondary level (level 6), due to the complexity of the mathematics descriptors. When reporting on NRS tables, use the level number.

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Educational Functioning Level (EFL)	Test Benchmarks
High Adult Secondary Education (ABE Level 6-ELA)	<p>TABE (11–12) scale scores (grade level 11–12): Reading: 617–800 Language: 631–800 Mathematics: 657–800</p>
Adult Secondary Education (ABE Mathematics Level 6)	<p>CASAS Reading GOALS scale scores: Reading: 249 and above</p> <p>CASAS Math GOALS scale scores: Mathematics: 236 and above</p> <p>MAPT scale scores: All tests: 600–700</p>

NRS Test Benchmarks for Educational Functioning Levels

Updated August 2019

English as a Second Language (ESL)

Educational Functioning Level (EFL)	Test Benchmarks
Beginning ESL Literacy (ESL Level 1—all subjects)	CASAS Life and Work Reading scale scores: Reading: 180 and below L&W Listening: 162–180 BEST⁵ Plus 2.0: 88–361 BEST Literacy: 0–20 (SPL 0–1) TABE CLAS-E⁶ scale scores⁷: Total Reading and Writing: 225–394 Total Listening and Speaking: 230–407
Low Beginning ESL (ESL Level 2—all subjects)	CASAS Life and Work Reading scale scores: Reading: 181–190 L&W Listening: 181–189 BEST Plus 2.0: 362–427 BEST Literacy: 21–52 (SPL 2) TABE CLAS-E scale scores: Total Reading and Writing: 395–441 Total Listening and Speaking: 408–449
High Beginning ESL (ESL Level 3—all subjects)	CASAS Life and Work Reading scale scores: Reading: 191–200 L&W Listening: 190–199 BEST Plus 2.0: 428–452 BEST Literacy: 53–63 (SPL 3) TABE CLAS-E scale scores: Total Reading and Writing: 442–482 Total Listening and Speaking: 450–485

⁵ BEST = Basic English Skills Test

⁶ TABE CLAS-E = Test of Adult Basic Education Complete Language Assessment System – English

⁷ Refer to the TABE CLAS-E Technical Manual for score ranges for individual reading, writing, listening and speaking tests. Table shows only total scores.

Equal Opportunity Employer/Program. Auxiliary aids and services are available upon request for individuals with disabilities.

NRS Test Benchmarks for Educational Functioning Levels

Updated August 2019

Educational Functioning Level (EFL)	Test Benchmarks
Low Intermediate ESL (ESL Level 4—all subjects)	CASAS Life and Work Reading scale scores: Reading: 201–210 L&W Listening: 200–209 BEST Plus 2.0: 453–484 BEST Literacy: 64–67 (SPL 4) TABE CLAS-E scale scores: Total Reading and Writing: 483–514 Total Listening and Speaking: 486–525
High Intermediate ESL (ESL Level 5—all subjects)	CASAS Life and Work Reading scale scores: Reading: 211–220 L&W Listening: 210–218 BEST Plus 2.0: 485–524 BEST Literacy: 68–75 (SPL 5) TABE CLAS-E scale scores: Total Reading and Writing: 515–556 Total Listening and Speaking: 526–558
Advanced ESL (ESL Level 6—all subjects)	CASAS Life and Work Reading scale scores: Reading: 221–235 L&W Listening: 219–227 BEST Plus: 525–564 (exit 565 and higher) BEST Literacy⁸: 76–78 (SPL 6) TABE CLAS-E scale scores: Total Reading and Writing: 557–600 Total Listening and Speaking: 559–600

⁸ Students can be placed into advanced ESL using Best Literacy but the test does not assess skills beyond this level so students cannot exit Advanced ESL with this test. Retesting of students who enter this level with another assessment is recommended.

Career Cluster Survey

Name _____

School _____ Date _____

Directions: Place a check in the space next to the items that best describe you. You may make as many or as few checks in each box as you choose. Add up the number of checks in each box. Look to see what box has the highest number. Find the corresponding cluster on the pages immediately following this survey to see which cluster you may want to explore further.

Activities that describe what I like to do: <input type="checkbox"/> Learn how things grow and stay alive. <input type="checkbox"/> Make the best use of the earth's natural resources. <input type="checkbox"/> Hunt and/or fish. <input type="checkbox"/> Protect the environment. <input type="checkbox"/> Be outdoors in all kinds of weather. <input type="checkbox"/> Plan, budget, and keep records. <input type="checkbox"/> Operate machines and keep them in good repair.	Personal qualities that describe me: <input type="checkbox"/> Self-reliant <input type="checkbox"/> Nature lover <input type="checkbox"/> Physically active <input type="checkbox"/> Planner <input type="checkbox"/> Creative problem solver	School subjects I like: <input type="checkbox"/> Math <input type="checkbox"/> Life Sciences <input type="checkbox"/> Earth Sciences <input type="checkbox"/> Chemistry <input type="checkbox"/> Agriculture	Total number checked in box #1 <div style="border: 1px solid black; width: 40px; height: 40px; margin: 0 auto;"></div>
Activities that describe what I like to do: <input type="checkbox"/> Read and follow blueprints and/or instructions. <input type="checkbox"/> Picture in my mind what a finished product looks like. <input type="checkbox"/> Work with my hands. <input type="checkbox"/> Perform work that requires precise results. <input type="checkbox"/> Solve technical problems. <input type="checkbox"/> Visit and learn from beautiful, historic, or interesting buildings. <input type="checkbox"/> Follow logical, step-by-step procedures.	Personal qualities that describe me: <input type="checkbox"/> Curious <input type="checkbox"/> Good at following directions <input type="checkbox"/> Pay attention to details <input type="checkbox"/> Good at visualizing possibilities <input type="checkbox"/> Patient and persistent	School subjects I like: <input type="checkbox"/> Math <input type="checkbox"/> Drafting <input type="checkbox"/> Physical Sciences <input type="checkbox"/> Construction Trades <input type="checkbox"/> Electrical Trades/Heat, Air Conditioning and Refrigeration/Technology Education	Total number checked in box #2 <div style="border: 1px solid black; width: 40px; height: 40px; margin: 0 auto;"></div>
Activities that describe what I like to do: <input type="checkbox"/> Use my imagination to communicate new information to others. <input type="checkbox"/> Perform in front of others. <input type="checkbox"/> Read and write. <input type="checkbox"/> Play a musical instrument. <input type="checkbox"/> Perform creative, artistic activities. <input type="checkbox"/> Use video and recording technology. <input type="checkbox"/> Design brochures and posters.	Personal qualities that describe me: <input type="checkbox"/> Creative and imaginative <input type="checkbox"/> Good communicator/good vocabulary <input type="checkbox"/> Curious about new technology <input type="checkbox"/> Relate well to feelings and thoughts of others <input type="checkbox"/> Determined/tenacious	School subjects I like: <input type="checkbox"/> Art/Graphic design <input type="checkbox"/> Music <input type="checkbox"/> Speech & Drama <input type="checkbox"/> Journalism/Literature <input type="checkbox"/> Audiovisual Technologies	Total number checked in box #3 <div style="border: 1px solid black; width: 40px; height: 40px; margin: 0 auto;"></div>
Activities that describe what I like to do: <input type="checkbox"/> Perform routine, organized activities but can be flexible. <input type="checkbox"/> Work with numbers and detailed information. <input type="checkbox"/> Be the leader in a group. <input type="checkbox"/> Make business contact with people. <input type="checkbox"/> Work with computer programs. <input type="checkbox"/> Create reports and communicate ideas. <input type="checkbox"/> Plan my work and follow instructions without close supervision.	Personal qualities that describe me: <input type="checkbox"/> Organized <input type="checkbox"/> Practical and logical <input type="checkbox"/> Patient <input type="checkbox"/> Tactful <input type="checkbox"/> Responsible	School subjects I like: <input type="checkbox"/> Computer Applications/Business and Information Technology <input type="checkbox"/> Accounting <input type="checkbox"/> Math <input type="checkbox"/> English <input type="checkbox"/> Economics	Total number checked in box #4 <div style="border: 1px solid black; width: 40px; height: 40px; margin: 0 auto;"></div>

Activities that describe what I like to do: <input type="checkbox"/> Communicate with different types of people. <input type="checkbox"/> Help others with their homework or to learn new things. <input type="checkbox"/> Go to school. <input type="checkbox"/> Direct and plan activities for others. <input type="checkbox"/> Handle several responsibilities at once. <input type="checkbox"/> Acquire new information. <input type="checkbox"/> Help people overcome their challenges.	Personal qualities that describe me: <input type="checkbox"/> Friendly <input type="checkbox"/> Decision maker <input type="checkbox"/> Helpful <input type="checkbox"/> Innovative/Inquisitive <input type="checkbox"/> Good listener	School subjects I like: <input type="checkbox"/> Language Arts <input type="checkbox"/> Social Studies <input type="checkbox"/> Math <input type="checkbox"/> Science <input type="checkbox"/> Psychology	Total number checked in box #5 <div style="border: 1px solid black; width: 40px; height: 40px; margin: 0 auto;"></div>
Activities that describe what I like to do: <input type="checkbox"/> Work with numbers. <input type="checkbox"/> Work to meet a deadline. <input type="checkbox"/> Make predictions based on existing facts. <input type="checkbox"/> Have a framework of rules by which to operate. <input type="checkbox"/> Analyze financial information and interpret it to others. <input type="checkbox"/> Handle money with accuracy and reliability. <input type="checkbox"/> Take pride in the way I dress and look.	Personal qualities that describe me: <input type="checkbox"/> Trustworthy <input type="checkbox"/> Orderly <input type="checkbox"/> Self-confident <input type="checkbox"/> Logical <input type="checkbox"/> Methodical or efficient	School subjects I like: <input type="checkbox"/> Accounting <input type="checkbox"/> Math <input type="checkbox"/> Economics <input type="checkbox"/> Banking/Financial Services <input type="checkbox"/> Business Law	Total number checked in box #6 <div style="border: 1px solid black; width: 40px; height: 40px; margin: 0 auto;"></div>
Activities that describe what I like to do: <input type="checkbox"/> Be involved in politics. <input type="checkbox"/> Negotiate, defend, and debate ideas and topics. <input type="checkbox"/> Plan activities and work cooperatively with others. <input type="checkbox"/> Work with details. <input type="checkbox"/> Perform a variety of duties that may change often. <input type="checkbox"/> Analyze information and interpret it to others. <input type="checkbox"/> Travel and see things that are new to me.	Personal qualities that describe me: <input type="checkbox"/> Good communicator <input type="checkbox"/> Competitive <input type="checkbox"/> Service minded <input type="checkbox"/> Well organized <input type="checkbox"/> Problem solver	School subjects I like: <input type="checkbox"/> Government <input type="checkbox"/> Language Arts <input type="checkbox"/> History <input type="checkbox"/> Math <input type="checkbox"/> Foreign Language	Total number checked in box #7 <div style="border: 1px solid black; width: 40px; height: 40px; margin: 0 auto;"></div>
Activities that describe what I like to do: <input type="checkbox"/> Work under pressure. <input type="checkbox"/> Help sick people and animals. <input type="checkbox"/> Make decisions based on logic and information. <input type="checkbox"/> Participate in health and science classes. <input type="checkbox"/> Respond quickly and calmly in emergencies. <input type="checkbox"/> Work as a member of a team. <input type="checkbox"/> Follow guidelines precisely and meet strict standards of accuracy.	Personal qualities that describe me: <input type="checkbox"/> Compassionate and caring <input type="checkbox"/> Good at following directions <input type="checkbox"/> Conscientious and careful <input type="checkbox"/> Patient <input type="checkbox"/> Good listener	School subjects I like: <input type="checkbox"/> Biological Sciences <input type="checkbox"/> Chemistry <input type="checkbox"/> Math <input type="checkbox"/> Occupational Health classes <input type="checkbox"/> Language Arts	Total number checked in box #8 <div style="border: 1px solid black; width: 40px; height: 40px; margin: 0 auto;"></div>

Activities that describe what I like to do: <input type="checkbox"/> Investigate new places and activities. <input type="checkbox"/> Work with all ages and types of people. <input type="checkbox"/> Organize activities in which other people enjoy themselves. <input type="checkbox"/> Have a flexible schedule. <input type="checkbox"/> Help people make up their minds. <input type="checkbox"/> Communicate easily, tactfully, and courteously. <input type="checkbox"/> Learn about other cultures.	Personal qualities that describe me: <input type="checkbox"/> Tactful <input type="checkbox"/> Self-motivated <input type="checkbox"/> Works well with others <input type="checkbox"/> Outgoing <input type="checkbox"/> Slow to anger	School subjects I like: <input type="checkbox"/> Language Arts/Speech <input type="checkbox"/> Foreign Language <input type="checkbox"/> Social Sciences <input type="checkbox"/> Marketing <input type="checkbox"/> Food Services	Total number checked in box #9 <div style="border: 1px solid black; width: 40px; height: 40px; margin: 0 auto;"></div>
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Activities that describe what I like to do: <input type="checkbox"/> Care about people, their needs, and their problems. <input type="checkbox"/> Participate in community services and/or volunteering. <input type="checkbox"/> Listen to other people's viewpoints. <input type="checkbox"/> Help people be at their best. <input type="checkbox"/> Work with people from preschool age to old age. <input type="checkbox"/> Think of new ways to do things. <input type="checkbox"/> Make friends with different kinds of people.	Personal qualities that describe me: <input type="checkbox"/> Good communicator/good listener <input type="checkbox"/> Caring <input type="checkbox"/> Non-materialistic <input type="checkbox"/> Uses intuition and logic <input type="checkbox"/> Non-judgmental	School subjects I like: <input type="checkbox"/> Language Arts <input type="checkbox"/> Psychology/Sociology <input type="checkbox"/> Family & Consumer Sciences <input type="checkbox"/> Finance <input type="checkbox"/> Foreign Language	Total number checked in box #10 <div style="border: 1px solid black; width: 40px; height: 40px; margin: 0 auto;"></div>
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Activities that describe what I like to do: <input type="checkbox"/> Work with computers. <input type="checkbox"/> Reason clearly and logically to solve complex problems. <input type="checkbox"/> Use machines, techniques, and processes. <input type="checkbox"/> Read technical materials and diagrams and solve technical problems. <input type="checkbox"/> Adapt to change. <input type="checkbox"/> Play video games and figure out how they work. <input type="checkbox"/> Concentrate for long periods without being distracted.	Personal qualities that describe me: <input type="checkbox"/> Logical/analytical thinker <input type="checkbox"/> Sees details in the big picture <input type="checkbox"/> Persistent <input type="checkbox"/> Good concentration skills <input type="checkbox"/> Precise and accurate	School subjects I like: <input type="checkbox"/> Math <input type="checkbox"/> Science <input type="checkbox"/> Computer Tech/Applications <input type="checkbox"/> Communications <input type="checkbox"/> Graphic Design	Total number checked in box #11 <div style="border: 1px solid black; width: 40px; height: 40px; margin: 0 auto;"></div>
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Activities that describe what I like to do: <input type="checkbox"/> Work under pressure or in the face of danger. <input type="checkbox"/> Make decisions based on my own observations. <input type="checkbox"/> Interact with other people. <input type="checkbox"/> Be in positions of authority. <input type="checkbox"/> Respect rules and regulations. <input type="checkbox"/> Debate and win arguments. <input type="checkbox"/> Observe and analyze people's behavior.	Personal qualities that describe me: <input type="checkbox"/> Adventurous <input type="checkbox"/> Dependable <input type="checkbox"/> Community-minded <input type="checkbox"/> Decisive <input type="checkbox"/> Optimistic	School subjects I like: <input type="checkbox"/> Language Arts <input type="checkbox"/> Psychology/Sociology <input type="checkbox"/> Government/History <input type="checkbox"/> Law Enforcement <input type="checkbox"/> First Aid/First Responder	Total number checked in box #12 <div style="border: 1px solid black; width: 40px; height: 40px; margin: 0 auto;"></div>
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Activities that describe what I like to do: <input type="checkbox"/> Work with my hands and learn best that way. <input type="checkbox"/> Put things together. <input type="checkbox"/> Do routine, organized and accurate work. <input type="checkbox"/> Perform activities that produce tangible results. <input type="checkbox"/> Apply math to work out solutions. <input type="checkbox"/> Use hand and power tools and operate equipment/machinery. <input type="checkbox"/> Visualize objects in three dimensions from flat drawings.	Personal qualities that describe me: <input type="checkbox"/> Practical <input type="checkbox"/> Observant <input type="checkbox"/> Physically active <input type="checkbox"/> Step-by-step thinker <input type="checkbox"/> Coordinated	School subjects I like: <input type="checkbox"/> Math-Geometry <input type="checkbox"/> Chemistry <input type="checkbox"/> Trade and Industry courses <input type="checkbox"/> Physics <input type="checkbox"/> Language Arts	Total number checked in box #13 <div style="border: 1px solid black; width: 40px; height: 40px; margin: 0 auto;"></div>
Activities that describe what I like to do: <input type="checkbox"/> Shop and go to the mall. <input type="checkbox"/> Be in charge. <input type="checkbox"/> Make displays and promote ideas. <input type="checkbox"/> Give presentations and enjoy public speaking. <input type="checkbox"/> Persuade people to buy products or to participate in activities. <input type="checkbox"/> Communicate my ideas to other people. <input type="checkbox"/> Take advantage of opportunities to make extra money.	Personal qualities that describe me: <input type="checkbox"/> Enthusiastic <input type="checkbox"/> Competitive <input type="checkbox"/> Creative <input type="checkbox"/> Self-motivated <input type="checkbox"/> Persuasive	School subjects I like: <input type="checkbox"/> Language Arts <input type="checkbox"/> Math <input type="checkbox"/> Business Education/Marketing <input type="checkbox"/> Economics <input type="checkbox"/> Computer Applications	Total number checked in box #14 <div style="border: 1px solid black; width: 40px; height: 40px; margin: 0 auto;"></div>
Activities that describe what I like to do: <input type="checkbox"/> Interpret formulas. <input type="checkbox"/> Find the answers to questions. <input type="checkbox"/> Work in a laboratory. <input type="checkbox"/> Figure out how things work and investigate new things. <input type="checkbox"/> Explore new technology. <input type="checkbox"/> Experiment to find the best way to do something. <input type="checkbox"/> Pay attention to details and help things be precise.	Personal qualities that describe me: <input type="checkbox"/> Detail oriented <input type="checkbox"/> Inquisitive <input type="checkbox"/> Objective <input type="checkbox"/> Methodical <input type="checkbox"/> Mechanically inclined	School subjects I like: <input type="checkbox"/> Math <input type="checkbox"/> Science <input type="checkbox"/> Drafting/Computer-aided drafting <input type="checkbox"/> Electronics/Computer Networking <input type="checkbox"/> Technical classes/Technology Education	Total number checked in box #15 <div style="border: 1px solid black; width: 40px; height: 40px; margin: 0 auto;"></div>
Activities that describe what I like to do: <input type="checkbox"/> Travel. <input type="checkbox"/> See well and have quick reflexes. <input type="checkbox"/> Solve mechanical problems. <input type="checkbox"/> Design efficient processes. <input type="checkbox"/> Anticipate needs and prepare to meet them. <input type="checkbox"/> Drive or ride. <input type="checkbox"/> Move things one place to another.	Personal qualities that describe me: <input type="checkbox"/> Realistic <input type="checkbox"/> Mechanical <input type="checkbox"/> Coordinated <input type="checkbox"/> Observant <input type="checkbox"/> Planner	School subjects I like: <input type="checkbox"/> Math <input type="checkbox"/> Trade and Industry courses <input type="checkbox"/> Physical Sciences <input type="checkbox"/> Economics <input type="checkbox"/> Foreign Language	Total number checked in box #16 <div style="border: 1px solid black; width: 40px; height: 40px; margin: 0 auto;"></div>

Disclaimer: Your interests may change over time. These survey results are intended to help you with informal career exploration. Consider more formal assessments and other resources or services to help you plan your career. This survey does not make any claims of statistical reliability.



The Sixteen Career Clusters

<p>1</p>	<p>The production, processing, marketing, distribution, financing, and development of agricultural commodities and resources including food, fiber, wood products, natural resources, horticulture, and other plant and animal products/resources.</p>
<p>2</p>	<p>Careers in designing, planning, managing, building, and maintaining the built environment.</p>
<p>3</p>	<p>Designing, producing, exhibiting, performing, writing, and publishing multimedia content including visual and performing arts and design, journalism, and entertainment services.</p>
<p>4</p>	<p>Business Management and Administration careers encompass planning, organizing, directing and evaluating business functions essential to efficient and productive business operations. Business Management and Administration career opportunities are available in every sector of the economy.</p>
<p>5</p>	<p>Planning, managing, and providing education and training services, and related learning support services.</p>
<p>6</p>	<p>Planning, services for financial and investment planning, banking, insurance, and business financial management.</p>
<p>7</p>	<p>Executing governmental functions to include governance, national security, foreign service, planning, revenue and taxation, regulation, and management and administration at the local, state, and federal levels.</p>
<p>8</p>	<p>Planning, managing, and providing therapeutic services, diagnostic services, health informatics, support services, and biotechnology research and development.</p>
<p>9</p>	<p>Hospitality and Tourism encompasses the management, marketing and operations of restaurants and other food services, lodging, attractions, and recreation events and travel-related services.</p>

 Human Services 10	<p>Preparing individuals for employment in career pathways that relate to families and human needs.</p>
 Information Technology 11	<p>Building linkages in IT occupations framework for entry-level, technical, and professional careers related to the design, development, support and management of hardware, software, multimedia, and systems integration services.</p>
 Law, Public Safety, Corrections & Security 12	<p>Planning, managing, and providing legal, public safety, protective services and homeland security, including professional and technical support services.</p>
 Manufacturing 13	<p>Planning, managing, and performing the processing of materials into intermediate or final products and related professional and technical support activities such as production planning and control, maintenance, and manufacturing/process engineering.</p>
 Marketing, Sales & Service 14	<p>Planning, managing, and performing marketing activities to reach organizational objectives.</p>
 Science, Technology, Engineering & Mathematics 15	<p>Planning, managing, and providing scientific research and professional and technical services (e.g., physical science, social science, engineering), including laboratory and testing services, and research and development services.</p>
 Transportation, Distribution & Logistics 16	<p>Planning, management, and movement of people, materials, and goods by road, pipeline, air, rail, and water and related professional and technical support services such as transportation infrastructure planning and management, logistics services, mobile equipment, and facility maintenance.</p>

My top three clusters of interest are:

1. _____
2. _____
3. _____

For more information, check with a career counselor at your high school, CareerTech center, higher education institution, or one-stop career centers.



These 16 Career Cluster icons are being used with permission of the:
States' Career Clusters Initiative, 2007, www.careerclusters.org

Green Country Workforce Development Board

YOUTH TRAINING PROVIDER PROCUREMENT FORM

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

STEM Occupations

CODE	OCCUPATION	Identified as STEM
11-3021.00	Computer and Information Systems Managers	O*NET Online
11-9041.00	Architectural and Engineering Managers	O*NET Online
11-9041.01	Biofuels/Biodiesel Technology and Product Development Managers	O*NET Online
11-9111.00	Medical and Health Services Managers	O*NET Online
11-9121.00	Natural Sciences Managers	O*NET Online
11-9121.01	Clinical Research Coordinators	O*NET Online
11-9121.02	Water Resource Specialists	O*NET Online
15-1211.00	Computer Systems Analysts	O*NET Online
15-1211.01	Health Informatics Specialists	O*NET Online
15-1212.00	Information Security Analysts	O*NET Online
15-1221.00	Computer and Information Research Scientists	O*NET Online
15-1231.00	Computer Network Support Specialists	O*NET Online
15-1232.00	Computer User Support Specialists	O*NET Online
15-1241.00	Computer Network Architects	O*NET Online
15-1241.01	Telecommunications Engineering Specialists	O*NET Online
15-1242.00	Database Administrators	O*NET Online
15-1243.00	Database Architects	O*NET Online
15-1243.01	Data Warehousing Specialists	O*NET Online
15-1244.00	Network and Computer Systems Administrators	O*NET Online
15-1251.00	Computer Programmers	O*NET Online
15-1252.00	Software Developers	O*NET Online
15-1253.00	Software Quality Assurance Analysts and Testers	O*NET Online
15-1254.00	Web Developers	O*NET Online
15-1255.00	Web and Digital Interface Designers	O*NET Online
15-1255.01	Video Game Designers	O*NET Online
15-1299.00	Computer Occupations, All Other	O*NET Online
15-1299.01	Web Administrators	O*NET Online
15-1299.02	Geographic Information Systems Technologists and Technicians	O*NET Online
15-1299.03	Document Management Specialists	O*NET Online
15-1299.04	Penetration Testers	O*NET Online
15-1299.05	Information Security Engineers	O*NET Online
15-1299.06	Digital Forensics Analysts	O*NET Online
15-1299.07	Blockchain Engineers	O*NET Online
15-1299.08	Computer Systems Engineers/Architects	O*NET Online
15-1299.09	Information Technology Project Managers	O*NET Online
15-2011.00	Actuaries Bright Outlook	O*NET Online
15-2021.00	Mathematicians	O*NET Online
15-2031.00	Operations Research Analysts	O*NET Online
15-2041.00	Statisticians	O*NET Online
15-2041.01	Biostatisticians	O*NET Online
15-2041.01	Biostatisticians	O*NET Online

15-2051.00	Data Scientists	O*NET Online
15-2051.01	Business Intelligence Analysts	O*NET Online
15-2051.02	Clinical Data Managers	O*NET Online
15-2099.00	Mathematical Science Occupations, All Other	O*NET Online
15-2099.01	Bioinformatics Technicians	O*NET Online
17-1011.00	Architects, Except Landscape and Naval	O*NET Online
17-1012.00	Landscape Architects	O*NET Online
17-1021.00	Cartographers and Photogrammetrists	O*NET Online
17-1022.00	Surveyors	O*NET Online
17-1022.01	Geodetic Surveyors	O*NET Online
17-2011.00	Aerospace Engineers	O*NET Online
17-2021.00	Agricultural Engineers	O*NET Online
17-2031.00	Bioengineers and Biomedical Engineers	O*NET Online
17-2041.00	Chemical Engineers	O*NET Online
17-2051.00	Civil Engineers	O*NET Online
17-2051.01	Transportation Engineers	O*NET Online
17-2051.02	Water/Wastewater Engineers	O*NET Online
17-2061.00	Computer Hardware Engineers	O*NET Online
17-2071.00	Electrical Engineers	O*NET Online
17-2072.00	Electronics Engineers, Except Computer	O*NET Online
17-2072.01	Radio Frequency Identification Device Specialists	O*NET Online
17-2081.00	Environmental Engineers	O*NET Online
17-2111.00	Health and Safety Engineers, Except Mining Safety Engineers and Inspectors	O*NET Online
17-2111.02	Fire-Prevention and Protection Engineers	O*NET Online
17-2112.00	Industrial Engineers	O*NET Online
17-2112.01	Human Factors Engineers and Ergonomists	O*NET Online
17-2112.02	Validation Engineers	O*NET Online
17-2112.03	Manufacturing Engineers	O*NET Online
17-2121.00	Marine Engineers and Naval Architects	O*NET Online
17-2131.00	Materials Engineers	O*NET Online
17-2141.00	Mechanical Engineers	O*NET Online
17-2141.01	Fuel Cell Engineers	O*NET Online
17-2141.02	Automotive Engineers	O*NET Online
17-2151.00	Mining and Geological Engineers, Including Mining Safety Engineers	O*NET Online
17-2161.00	Nuclear Engineers	O*NET Online
17-2171.00	Petroleum Engineers	O*NET Online
17-2199.00	Engineers, All Other	O*NET Online
17-2199.03	Energy Engineers, Except Wind and Solar	O*NET Online
17-2199.05	Mechatronics Engineers	O*NET Online
17-2199.06	Microsystems Engineers	O*NET Online
17-2199.07	Photonics Engineers	O*NET Online
17-2199.08	Robotics Engineers	O*NET Online

17-2199.09	Nanosystems Engineers	O*NET Online
17-2199.10	Wind Energy Engineers	O*NET Online
17-2199.11	Solar Energy Systems Engineers	O*NET Online
17-3011.00	Architectural and Civil Drafters	O*NET Online
17-3012.00	Electrical and Electronics Drafters	O*NET Online
17-3013.00	Mechanical Drafters	O*NET Online
17-3019.00	Drafters, All Other	O*NET Online
17-3021.00	Aerospace Engineering and Operations Technologists and Technicians	O*NET Online
17-3022.00	Civil Engineering Technologists and Technicians	O*NET Online
17-3023.00	Electrical and Electronic Engineering Technologists and Technicians	O*NET Online
17-3024.00	Electro-Mechanical and Mechatronics Technologists and Technicians	O*NET Online
17-3024.01	Robotics Technicians	O*NET Online
17-3025.00	Environmental Engineering Technologists and Technicians	O*NET Online
17-3026.00	Industrial Engineering Technologists and Technicians	O*NET Online
17-3026.01	Nanotechnology Engineering Technologists and Technicians	O*NET Online
17-3027.00	Mechanical Engineering Technologists and Technicians	O*NET Online
17-3027.01	Automotive Engineering Technicians	O*NET Online
17-3028.00	Calibration Technologists and Technicians	O*NET Online
17-3029.00	Engineering Technologists and Technicians, Except Drafters, All Other	O*NET Online
17-3029.01	Non-Destructive Testing Specialists	O*NET Online
17-3029.08	Photonics Technicians	O*NET Online
17-3031.00	Surveying and Mapping Technicians	O*NET Online
19-1011.00	Animal Scientists	O*NET Online
19-1012.00	Food Scientists and Technologists	O*NET Online
19-1013.00	Soil and Plant Scientists	O*NET Online
19-1021.00	Biochemists and Biophysicists	O*NET Online
19-1022.00	Microbiologists	O*NET Online
19-1023.00	Zoologists and Wildlife Biologists	O*NET Online
19-1029.00	Biological Scientists, All Other	O*NET Online
19-1029.01	Bioinformatics Scientists	O*NET Online
19-1029.02	Molecular and Cellular Biologists	O*NET Online
19-1029.03	Geneticists	O*NET Online
19-1029.04	Biologists	O*NET Online
19-1031.00	Conservation Scientists	O*NET Online
19-1031.02	Range Managers	O*NET Online
19-1031.03	Park Naturalists	O*NET Online
19-1032.00	Foresters	O*NET Online
19-1041.00	Epidemiologists	O*NET Online

19-1042.00	Medical Scientists, Except Epidemiologists	O*NET Online
19-1099.00	Life Scientists, All Other	O*NET Online
19-2011.00	Astronomers	O*NET Online
19-2012.00	Physicists	O*NET Online
19-2021.00	Atmospheric and Space Scientists	O*NET Online
19-2031.00	Chemists	O*NET Online
19-2032.00	Materials Scientists	O*NET Online
19-2041.00	Environmental Scientists and Specialists, Including Health	O*NET Online
19-2041.01	Climate Change Policy Analysts	O*NET Online
19-2041.02	Environmental Restoration Planners	O*NET Online
19-2041.03	Industrial Ecologists	O*NET Online
19-2042.00	Geoscientists, Except Hydrologists and Geographers	O*NET Online
19-2043.00	Hydrologists	O*NET Online
19-2099.00	Physical Scientists, All Other	O*NET Online
19-2099.01	Remote Sensing Scientists and Technologists	O*NET Online
19-3011.00	Economists	O*NET Online
19-3011.01	Environmental Economists	O*NET Online
19-3022.00	Survey Researchers	O*NET Online
19-3032.00	Industrial-Organizational Psychologists	O*NET Online
19-3033.00	Clinical and Counseling Psychologists	O*NET Online
19-3034.00	School Psychologists	O*NET Online
19-3039.00	Psychologists, All Other	O*NET Online
19-3039.02	Neuropsychologists	O*NET Online
19-3039.03	Clinical Neuropsychologists	O*NET Online
19-3041.00	Sociologists	O*NET Online
19-3051.00	Urban and Regional Planners	O*NET Online
19-3091.00	Anthropologists and Archeologists	O*NET Online
19-3092.00	Geographers	O*NET Online
19-3094.00	Political Scientists	O*NET Online
19-3099.00	Social Scientists and Related Workers, All Other	O*NET Online
19-3099.01	Transportation Planners	O*NET Online
19-4012.00	Agricultural Technicians	O*NET Online
19-4012.01	Precision Agriculture Technicians	O*NET Online
19-4013.00	Food Science Technicians	O*NET Online
19-4021.00	Biological Technicians	O*NET Online
19-4031.00	Chemical Technicians	O*NET Online
19-4042.00	Environmental Science and Protection Technicians, Including Health	O*NET Online
19-4043.00	Geological Technicians, Except Hydrologic Technicians	O*NET Online
19-4044.00	Hydrologic Technicians	O*NET Online
19-4051.00	Nuclear Technicians	O*NET Online
19-4051.02	Nuclear Monitoring Technicians	O*NET Online
19-4061.00	Social Science Research Assistants	O*NET Online

19-4071.00	Forest and Conservation Technicians	O*NET Online
19-4092.00	Forensic Science Technicians	O*NET Online
19-4099.00	Life, Physical, and Social Science Technicians, All Other	O*NET Online
19-4099.01	Quality Control Analysts	O*NET Online
19-4099.03	Remote Sensing Technicians	O*NET Online
25-1021.00	Computer Science Teachers, Postsecondary	O*NET Online
25-1022.00	Mathematical Science Teachers, Postsecondary	O*NET Online
25-1031.00	Architecture Teachers, Postsecondary	O*NET Online
25-1032.00	Engineering Teachers, Postsecondary	O*NET Online
25-1041.00	Agricultural Sciences Teachers, Postsecondary	O*NET Online
25-1042.00	Biological Science Teachers, Postsecondary	O*NET Online
25-1043.00	Forestry and Conservation Science Teachers, Postsecondary	O*NET Online
25-1051.00	Atmospheric, Earth, Marine, and Space Sciences Teachers, Postsecondary	O*NET Online
25-1052.00	Chemistry Teachers, Postsecondary	O*NET Online
25-1053.00	Environmental Science Teachers, Postsecondary	O*NET Online
25-1054.00	Physics Teachers, Postsecondary	O*NET Online
25-1061.00	Anthropology and Archeology Teachers, Postsecondary	O*NET Online
25-1062.00	Area, Ethnic, and Cultural Studies Teachers, Postsecondary	O*NET Online
25-1063.00	Economics Teachers, Postsecondary	O*NET Online
25-1064.00	Geography Teachers, Postsecondary	O*NET Online
25-1065.00	Political Science Teachers, Postsecondary	O*NET Online
25-1066.00	Psychology Teachers, Postsecondary	O*NET Online
25-1067.00	Sociology Teachers, Postsecondary	O*NET Online
25-1069.00	Social Sciences Teachers, Postsecondary, All Other	O*NET Online
25-1071.00	Health Specialties Teachers, Postsecondary	O*NET Online
25-1072.00	Nursing Instructors and Teachers, Postsecondary	O*NET Online
29-1011.00	Chiropractors	O*NET Online
29-1021.00	Dentists, General	O*NET Online
29-1022.00	Oral and Maxillofacial Surgeons	O*NET Online
29-1023.00	Orthodontists	O*NET Online
29-1024.00	Prosthodontists	O*NET Online
29-1029.00	Dentists, All Other Specialists	O*NET Online
29-1031.00	Dietitians and Nutritionists	O*NET Online
29-1041.00	Optometrists	O*NET Online
29-1051.00	Pharmacists	O*NET Online
29-1071.00	Physician Assistants	O*NET Online
29-1071.01	Anesthesiologist Assistants	O*NET Online
29-1081.00	Podiatrists	O*NET Online

29-1122.00	Occupational Therapists	O*NET Online
29-1122.01	Low Vision Therapists, Orientation and Mobility Specialists, and Vision Rehabilitation Therapists	O*NET Online
29-1123.00	Physical Therapists	O*NET Online
29-1124.00	Radiation Therapists	O*NET Online
29-1125.00	Recreational Therapists	O*NET Online
29-1126.00	Respiratory Therapists	O*NET Online
29-1127.00	Speech-Language Pathologists	O*NET Online
29-1128.00	Exercise Physiologists	O*NET Online
29-1129.00	Therapists, All Other	O*NET Online
29-1129.01	Art Therapists	O*NET Online
29-1129.02	Music Therapists	O*NET Online
29-1131.00	Veterinarians	O*NET Online
29-1141.00	Registered Nurses	O*NET Online
29-1141.01	Acute Care Nurses	O*NET Online
29-1141.02	Advanced Practice Psychiatric Nurses	O*NET Online
29-1141.03	Critical Care Nurses	O*NET Online
29-1141.04	Clinical Nurse Specialists	O*NET Online
29-1151.00	Nurse Anesthetists	O*NET Online
29-1161.00	Nurse Midwives	O*NET Online
29-1171.00	Nurse Practitioners	O*NET Online
29-1181.00	Audiologists	O*NET Online
29-1211.00	Anesthesiologists	O*NET Online
29-1212.00	Cardiologists	O*NET Online
29-1213.00	Dermatologists	O*NET Online
29-1214.00	Emergency Medicine Physicians	O*NET Online
29-1215.00	Family Medicine Physicians	O*NET Online
29-1216.00	General Internal Medicine Physicians	O*NET Online
29-1217.00	Neurologists	O*NET Online
29-1218.00	Obstetricians and Gynecologists	O*NET Online
29-1221.00	Pediatricians, General	O*NET Online
29-1222.00	Physicians, Pathologists	O*NET Online
29-1223.00	Psychiatrists	O*NET Online
29-1224.00	Radiologists	O*NET Online
29-1229.00	Physicians, All Other	O*NET Online
29-1229.01	Allergists and Immunologists	O*NET Online
29-1229.02	Hospitalists	O*NET Online
29-1229.03	Urologists	O*NET Online
29-1229.04	Physical Medicine and Rehabilitation Physicians	O*NET Online
29-1229.05	Preventive Medicine Physicians	O*NET Online
29-1229.06	Sports Medicine Physicians	O*NET Online
29-1241.00	Ophthalmologists, Except Pediatric	O*NET Online
29-1242.00	Orthopedic Surgeons, Except Pediatric	O*NET Online
29-1243.00	Pediatric Surgeons	O*NET Online
29-1249.00	Surgeons, All Other	O*NET Online

29-1291.00	Acupuncturists	O*NET Online
29-1292.00	Dental Hygienists	O*NET Online
29-1299.00	Healthcare Diagnosing or Treating Practitioners, All Other	O*NET Online
29-1299.01	Naturopathic Physicians	O*NET Online
29-1299.02	Orthoptists	O*NET Online
29-2011.00	Medical and Clinical Laboratory Technologists	O*NET Online
29-2011.01	Cytogenetic Technologists	O*NET Online
29-2011.02	Cytotechnologists	O*NET Online
29-2011.04	Histotechnologists	O*NET Online
29-2012.00	Medical and Clinical Laboratory Technicians	O*NET Online
29-2012.01	Histology Technicians	O*NET Online
29-2031.00	Cardiovascular Technologists and Technicians	O*NET Online
29-2032.00	Diagnostic Medical Sonographers	O*NET Online
29-2033.00	Nuclear Medicine Technologists	O*NET Online
29-2034.00	Radiologic Technologists and Technicians	O*NET Online
29-2035.00	Magnetic Resonance Imaging Technologists	O*NET Online
29-2036.00	Medical Dosimetrists	O*NET Online
29-2042.00	Emergency Medical Technicians	O*NET Online
29-2043.00	Paramedics	O*NET Online
29-2051.00	Dietetic Technicians	O*NET Online
29-2052.00	Pharmacy Technicians	O*NET Online
29-2053.00	Psychiatric Technicians	O*NET Online
29-2055.00	Surgical Technologists	O*NET Online
29-2056.00	Veterinary Technologists and Technicians	O*NET Online
29-2057.00	Ophthalmic Medical Technicians	O*NET Online
29-2061.00	Licensed Practical and Licensed Vocational Nurses	O*NET Online
29-2072.00	Medical Records Specialists	O*NET Online
29-2081.00	Opticians, Dispensing	O*NET Online
29-2091.00	Orthotists and Prosthetists	O*NET Online
29-2092.00	Hearing Aid Specialists	O*NET Online
29-2099.00	Health Technologists and Technicians, All Other	O*NET Online
29-2099.01	Neurodiagnostic Technologists	O*NET Online
29-2099.05	Ophthalmic Medical Technologists	O*NET Online
29-2099.08	Patient Representatives	O*NET Online
29-9021.00	Health Information Technologists and Medical Registrars	O*NET Online
29-9091.00	Athletic Trainers	O*NET Online
29-9092.00	Genetic Counselors	O*NET Online
29-9093.00	Surgical Assistants	O*NET Online
29-9099.00	Healthcare Practitioners and Technical Workers, All Other	O*NET Online
29-9099.01	Midwives	O*NET Online

31-1014.00	Nursing Assistants	GCWDB Approved
31-2011.00	Occupational Therapy Assistants	GCWDB Approved
31-2012.00	Occupational Therapy Aides	GCWDB Approved
31-2021.00	Physical Therapist Assistants	GCWDB Approved
31-9091.00	Dental Assistants	GCWDB Approved
31-9092.00	Medical Assistants	GCWDB Approved
31-9096.00	Veterinary Assistants and Laboratory Animal Caretakers	GCWDB Approved
31-9097.00	Phlebotomists	GCWDB Approved
31-9099.01	Speech-Language Pathology Assistants	GCWDB Approved
31-9099.02	Endoscopy Technicians	GCWDB Approved
41-4011.00	Sales Representatives, Wholesale and Manufacturing, Technical and Scientific Products	GCWDB Approved
41-4011.07	Solar Sales Representatives and Assessors	GCWDB Approved
41-9031.00	Sales Engineers	GCWDB Approved
43-3031.00	Bookkeeping, Accounting, and Auditing Clerks	GCWDB Approved
43-9111.01	Bioinformatics Technicians	GCWDB Approved
47-2031.00	Carpenters	GCWDB Approved
47-2111.00	Electricians	GCWDB Approved
49-3011.00	Aircraft Mechanics and Service Technicians	GCWDB Approved
49-9021.00	Heating, Air Conditioning, and Refrigeration Mechanics and Installers	GCWDB Approved
49-9021.01	Heating and Air Conditioning Mechanics and Installers	GCWDB Approved
49-9021.02	Refrigeration Mechanics and Installers	GCWDB Approved
49-9051.00	Electrical Power-Line Installers and Repairers	GCWDB Approved
49-9052.00	Telecommunications Line Installers and Repairers	GCWDB Approved
49-9062.00	Medical Equipment Repairers	GCWDB Approved
49-9081.00	Wind Turbine Service Technicians	GCWDB Approved
51-2011.00	Aircraft Structure, Surfaces, Rigging, and Systems Assemblers	GCWDB Approved
51-4011.00	Computer-Controlled Machine Tool Operators, Metal and Plastic	GCWDB Approved
51-4034.00	Lathe and Turning Machine Tool Setters, Operators, and Tenders, Metal and Plastic	GCWDB Approved
51-4121.00	Welders, Cutters, Solderers, and Brazers	GCWDB Approved
51-4121.06	Welders, Cutters, and Welder Fitters	GCWDB Approved
51-4121.07	Solderers and Brazers Green Occupation	GCWDB Approved
51-4122.00	Welding, Soldering, and Brazing Machine Setters, Operators, and Tenders	GCWDB Approved
51-9082.00	Medical Appliance Technicians	GCWDB Approved

Sample (Service provider may change to form to accommodate the needs of the participants.)

Youth must be contacted at least one time every 30 days.

Follow up Form

☐ Adult ☐ Dislocated Worker ☐ Youth Date: _____

Pre-Exit Questionnaire

Name: _____ Participant ID# _____

1. Has job seeker completed all services outlined in his/her ISS? Yes ☐ No ☐
2. What supportive services did the job seeker receive?

3. Is the job seeker attending post-secondary school or advanced training at a technical school/technology center? Yes ☐ No ☐
4. If so, where is the school located? What courses is the job seeker taking, and when are they projected to complete the course? _____

5. Is the job seeker currently working? Yes ☐ No ☐
6. If so, what company, what job role, and for what wage? _____

7. Did the job seeker receive any credentials/certificates/diplomas during program enrollment?
Yes ☐ No ☐
8. If so, what credentials/certificates/diplomas did the job seeker receive?

9. What is the exit date for job seeker (last service date)? _____
10. Additional Information? _____

Sample (Service provider may change to form to accommodate the needs of the participants.)

Youth must be contacted at least one time every 30 days.

Checklist:

- ☐ Program Notes match services in S&T Plan and Employment Plan Exit program note in OKJob Match
- ☐ Follow-up program note in OKJob Match (follow-up starts day after exit date) In-progress follow-up service entered in Service & Training Plan (follow-up starts day after exit date)
- ☐ Modification of OKJob Match Employment Plan Planned Exit Date and services
- ☐ Email sent for follow-up approval to Quality Assurance Specialist

Other information:

Case Manager Signature: _____ Date: _____

Sample (Service provider may change to form to accommodate the needs of the participants.)

Youth must be contacted at least one time every 30 days.

1st Follow-Up Contact **Date:** _____

1. Is the job seeker attending post-secondary school or advanced training at a technical school/technology center? Yes ☐ No ☐
2. If so, where is the school located? What courses is the job seeker taking, and when are they projected to complete the course? _____

3. Has the job seeker entered into military service? Yes ☐ No ☐
4. Has the job seeker entered into a qualified apprenticeship? Yes ☐ No ☐
5. If so, where, what is the apprenticeship for, and when are they projected to complete the apprenticeship? _____

6. Did the job seeker receive any credentials/certificates/diplomas during 1st Quarter of Follow-Up?
Yes ☐ No ☐
7. If so, what credentials/certificates/diplomas did the job seeker receive? What is the attainment date? _____

- ☐ Exit Questions Answered in OKJob Match
- ☐ 1st Quarter Outcomes answered
- ☐ 1st Quarter follow-up service provided
- ☐ Follow-up service enter in Service & Training Plan

Other Information: _____

Case Manager Signature: _____ Date: _____

Sample (Service provider may change to form to accommodate the needs of the participants.)

Youth must be contacted at least one time every 30 days.

2nd Follow-Up Contact **Date:** _____

1. Is the job seeker currently working? Yes ☐ No ☐
2. If so, what company, what job role, and for what wage?

3. Has the job seeker entered into a qualified apprenticeship? Yes ☐ No ☐
4. If so, where, what is the apprenticeship for, and when are they projected to complete the apprenticeship?

5. Has the job seeker entered into military service? Yes ☐ No ☐
6. Is the job seeker attending secondary school, post-secondary school, or advanced training at a technical school/technology center? Yes ☐ No ☐
7. If so, where is the school located? What courses is the job seeker taking, and when are they projected to complete the course?

8. Did the job seeker receive any credentials/certificates/diplomas during 2nd Quarter of Follow-Up?
Yes ☐ No ☐
9. If so, what credentials/certificates/diplomas did the job seeker receive? What is the attainment date? _____

- ☐ 2nd Quarter Outcomes answered
- ☐ 2nd Quarter follow-up service provided
- ☐ Follow-up service enter in Service & Training Plan

Other Information: _____

Case Manager Signature: _____ Date: _____

Sample (Service provider may change to form to accommodate the needs of the participants.)

Youth must be contacted at least one time every 30 days.

3rd Follow-Up Contact **Date:** _____

1. Did the job seeker receive any credentials/certificates/diplomas during 3rd Quarter of Follow-Up?
Yes ☐ No ☐
2. If so, what credentials/certificates/diplomas did the job seeker receive? What is the attainment date?

3. Is the job seeker attending post-secondary school or advanced training at a technical school/technology center? Yes ☐ No ☐
4. If so, where is the school located? What courses is the job seeker taking, and when are they projected to complete the course? _____

5. Has the job seeker entered into military service? Yes ☐ No ☐
6. Has the job seeker entered into a qualified apprenticeship? Yes ☐ No ☐
7. If so, where, what is the apprenticeship for, and when are they projected to complete the apprenticeship?

☐ 3rd Quarter Outcomes answered
☐ 3rd Quarter follow-up service provided
☐ Follow-up service enter in Service & Training Plan

Other Information:

Case Manager Signature: _____ Date: _____

Sample (Service provider may change to form to accommodate the needs of the participants.)

Youth must be contacted at least one time every 30 days.

4th Follow-Up Contact Date: _____

1. Is the job seeker currently working? Yes ☐ No ☐
2. If so, what company, what job role, and for what wage? _____

3. Has the job seeker entered into a qualified apprenticeship? Yes ☐ No ☐
4. If so, where, what is the apprenticeship for, and when are they projected to complete the apprenticeship?

5. Has the job seeker entered into military service? Yes ☐ No ☐
6. Is the job seeker attending secondary school, post-secondary school, or advanced training at a technical school/technology center? Yes ☐ No ☐
7. If so, where is the school located? What courses is the job seeker taking, and when are they projected to complete the course? _____

8. Did the job seeker receive any credentials/certificates/diplomas during 4th Quarter of Follow-Up?
Yes ☐ No ☐
9. If so, what credentials/certificates/diplomas did the job seeker receive? What is the attainment date?

☐ 4th Quarter Outcomes answered
☐ 4th Quarter follow-up service provided
☐ Follow-up service enter in Service & Training Plan
☐ In-progress follow-up service modified to completed in Service & Training Plan
☐ Email sent for approval of complete exit of program to Quality Assurance Specialist

Other Information: _____

Case Manager Signature: _____ Date: _____

The Virtual Case Management System - Virtual IEP/ISS

The following instructions are for the completion of the Individual Employment Plan/Individual Service Strategy found in the WIOA Program Enrollment section of the virtual case management system. A summary or narrative of each IEP/ISS component must be entered in the virtual IEP, as described in OWDI #03-2019.

	IEP / ISS Components	Instructions
1.	Comprehensive/Objective Assessment & Career Research.	<ul style="list-style-type: none"> Identify all comprehensive/objective assessment tools used, including any known assessments given by partner entities. List the date or dates assessments were completed. Summarize assessment results. Provide a brief overview of the participant's employment history. Document any career research completed by/reviewed with the participant. Indicate whether participant has a clear understanding of job requirements based on research completed, including labor market information (LMI), when appropriate. Address the action taken when results of the career research are not in alignment with assessment results. For information regarding the Objective Assessment required for each Youth participant refer to OWDI #02-2016, Change 1.
2.	Employment Goals & Achievement Objectives.	<ul style="list-style-type: none"> Identify the employment goal(s) and address alignment with assessment results. Identify a timeline for achieving the major employment goal, including achievement objectives leading to the goal. If applicable, identify short term and long-term employment goals (e.g., a participant's career pathway).

3.	Training Goals and Achievement Objectives.	<ul style="list-style-type: none"> • Document that training is necessary to achieve the identified employment goal and/or career pathway goals. • Identify whether the participant is currently enrolled in training and needs assistance for completion. • List the type of training, including occupational skills training (OST), on-the-job training (OJT), or other work-based training such as work experience, registered apprenticeship, or a transitional job. Note: The justification for work experience or a transitional job must be entered in section 5. • Ensure training is for a demand occupation or required for a career pathway that leads to a demand occupation. • Provide a detailed description of the participant's training plan, including the training provider, the dates of training, and identification of achievement objectives expected or resulting from the training program attendance. • Modifications to the training plan must be documented in the IEP as they occur, including: <ol style="list-style-type: none"> (1) Date of modification (2) Modification number (3) Identification of what is being modified (i.e., record the need and necessary actions to resolve the need). • Note: A modified training goal must remain aligned with the participant's career pathway/employment goal and any change to the training plan will require an updated Client Involvement Statement.
4.	Client Strengths and Attributes.	<ul style="list-style-type: none"> • Summarize skills and experiences from prior employment, training, hobbies, volunteer work, and home/family responsibilities as they relate to the employment goal. • Consider any personal characteristics, assets, and resources that can be related to the employment goal.

5.	Combination of Services to Overcome Needs/Barriers.	<ul style="list-style-type: none"> • Address the appropriate combination of services for the participant to achieve their employment goals. The following barriers must be addressed if identified, and necessary services to overcome all identified barriers must be entered. <ul style="list-style-type: none"> ▪ Basic skills deficient; ▪ School Drop Out; ▪ Lacks skills, training, or a credential; ▪ Criminal record; ▪ English as a Second Language (ESL); ▪ Lack of transportation; ▪ Substance Abuse; ▪ No Driver's License; ▪ Lack of Child Care; ▪ Difficulty finding employment; ▪ Poor work history, i.e., chronic unemployment or inconsistent work history; ▪ Homeless; and ▪ Other identified barriers, as observed, stated by the participant, or listed in the client's Demographics section of the virtual case management system. • Include a statement regarding the need for a Transitional Job or Work Experience. • List any short-term prevocational skills to be provided, such as communications skills, development of learning skills, personal maintenance skills, professional conduct, etc. • List identified solutions to the needs/barriers listed, including <ul style="list-style-type: none"> ▪ Who will provide the service ▪ Date service is expected to be started and completed ▪ Document any referrals made to partner agencies and community partners.
6.	Assistive Technology Needs for Achieving Goals.	<ul style="list-style-type: none"> • Address any requested reasonable accommodations without the mention of a disability or details of a disability. • If applicable, enter a general statement regarding requested assistive technology needs, if any, for seamless customer service delivery.

		<ul style="list-style-type: none"> Enter N/A if this section does not apply.
7.	Client Responsibilities and Agency Responsibilities.	<p>Include responsibilities required by local policy and/or local procedures that are <u>not</u> addressed in the Client Involvement Statement.</p> <p>Client Responsibility examples:</p> <ul style="list-style-type: none"> Frequency for contacting the designated WIOA case manager; Frequency for face-to-face meetings with the WIOA representative; Requirement to actively seek and accept training related employment upon completion of services, which may include feedback regarding employment search, e.g., application and resume submission, interviews scheduled or completed, and follow-up with employers; Attend training regularly and provide verification of satisfactory training progress, as requested; Provision of specific information regarding attained employment before leaving the program, including the name of employer, job title, start date, rate of pay, benefits received or eligible to receive, etc.; Respond to all surveys and other requests for information after leaving the program, including the follow-up interview; Timely notification of changes in training status, including non-attendance and adding or dropping classes; Reporting eligibility for Pell or other grants or financial assistance; Reporting address or phone number changes; and Other responsibilities, as determined by local policy and procedures. <p>Responsibilities of WIOA staff may include:</p> <ul style="list-style-type: none"> Oversight/regular monitoring of training activities, Submission of appropriate paperwork in a timely manner, Providing regular support and assistance as necessary for program success, Providing career and job search guidance,

		<ul style="list-style-type: none"> • Ensuring appropriate referrals to workshops and partner entities to enhance the client's success in the job market, and • Other responsibilities, as determined by local policy and procedures.
8.	Economic Need Statement and Planning.	<ul style="list-style-type: none"> • Summarize the financial needs articulated by the client through the interview, assessment, and enrollment process. • For the Adult program, enter the Priority of Service Category. • Document Pell eligibility/ineligibility, as well as exploration and documentation of other financial aid options such as Tribal funds, scholarships, TAA, education funding for Veterans, etc. • Note if the participant is in default on student loans and document any steps taken to help the individual get out of default, e.g., the provision of financial literacy information. • Other information as per local policy and procedures.
9.	Supportive Service Needs.	<p>This section pertains specifically to supportive services provided with Title I funds, not partner provided services, which are addressed in section 5.</p> <ul style="list-style-type: none"> • Enter the supportive services provided and a brief statement as to the necessity of the service. • Document the date of provision, amount, etc.; • Provide an explanation of why any requested supportive services were not provided.
10.	Follow-up Services Planned.	<p>For individuals in the Adult and DLW programs:</p> <ul style="list-style-type: none"> • Enter details about planned follow-up services after employment attainment. • Document the services as they occur.
11.	Performance Goals & Accountability Indicators.	<ul style="list-style-type: none"> • List measurable skills gains that are expected according to the training plan. • List the credentials that are expected outcomes of the training goals/training plan. • List planned credential attainment dates.

12.	Client Progress Review.	<ul style="list-style-type: none"> • Include a brief summary of how the individual is progressing in the current phase of their employment plan, based on feedback from the participant, an instructor or supervisor, or documents provided such as grades, certificates of completion, etc. • Indicate the progression made or difficulties encountered during the review period. <u>For example:</u> <i>Training was successfully completed four months ago but Joe has not yet attained employment. A mock interview was set up with ABC, Inc. and it was determined that he does not interview well and also needs resume assistance. A new entry has been entered in section 5, Combination of Services to Overcome Needs/Barriers.</i> • Any modifications to the IEP resulting from a progress review must be documented in the appropriate section. For example, employment goal, training goals, supportive services, etc.
13.	Additional Notes.	Enter any additional information necessary to the IEP/ISS and success of the client, such as why there is a gap in service. <u>For example:</u> <i>Joe's mother passed away and he will travel to New York to attend the services and settle her estate. He has made arrangements with the training provider to resume training in three weeks when he returns to Oklahoma.</i>
14.	Client Involvement Statement.	<ul style="list-style-type: none"> • Virtual attestation to the Client Involvement statement is made in the virtual case management system. • For modifications to the original IEP not conducted in person with the participant, the case manager must schedule an appointment with the participant as soon as possible to review the IEP and obtain the virtual signature to the Client Involvement Statement. • For case management only updates, check the box indicating a client agreement is not required.

Information found in the IEP, does not have to be duplicated in Program Notes, unless required by current Data Validation policy.



GREEN COUNTRY WORKFORCE DEVELOPMENT BOARD

Supportive Services Request

This form must be filled out for every supportive service request prior to payment/issuing of funds. A copy of the completed form as well as copies of the supporting documentation must be placed in/uploaded to the participant file for monitoring and documentation purposes. The completed form and any supporting documentation must be mailed/e-mailed to the GCWDB Fiscal Agent for payment or appropriate Service Provider(s) Fiscal Agent for payment for youth.

Participant

PID#:

Name:

☐ ADULT
 ☐ DLW
 ☐ YOUTH
 ☐ SUPPORTIVE SERVICE REQUEST
 ☐ NEEDS RELATED PAYMENTS REQUEST

(1) Describe the supportive service requested, rationale for request, funding amount needed and list all attached required verification (i.e. car registration, estimates, supportive services budget, valid driver license, valid insurance card, rental agreement):

(2) List documentation that other resources were not available (List other possible funding sources contacted, date and time of contact, contact information, person spoken to and results.):

(3) If approved, payments to be made to (vendor name, address, phone, fax, etc):

(4) Workforce Staff Certification and contact information (*Check all that apply*):

- ☐ Supportive service request does comply with local board policy.
- ☐ Appropriate program note was added to Participant's on-line file.
- ☐ Any quotes, verification documents and supporting documentation of need for supportive service request are attached.
- ☐ Other funding source is not available – as listed above. All appropriate resources for this service were explored and reviewed as per policy.

 Service Provider/Workforce Staff Name

 Date



GREEN COUNTRY WORKFORCE

DEVELOPMENT BOARD

Supportive Service Voucher

Issued through GCWDB WIOA Title I Adult, Dislocated Worker and Youth Programs contracted service provider.

Vendor:

VOUCHER #

Contact

Title:

Person:

Address:

Telephone:

Fax:

Email:

ANY REFUNDS OR RETURNS FOR ITEMS OR NON-COMPLETION OF SERVICES, BY LAW, MUST BE MADE TO GCWDB WIOA TITLE I ADULT, DISLOCATED WORKER AND YOUTH PROGRAMS CONTRACTED SERVICE PROVIDER.

Participant

Name:

PID#:

☐ ADULT

☐ DLW

☐ YOUTH IN SCHOOL

☐ YOUTH OUT-OF-SCHOOL

Quantity	Item or Service Description	Cost per Item	Total
<u>VENDOR BILLING INSTRUCTIONS:</u>			
See page 2			
		TOTAL	

Authorized Signature

Date

ANY OBVIOUS CHANGES, WHITE OUT, MARK THROUGH, ERASER MARKS, WRITE OVER, WILL VOID THIS VOUCHER



"Equal opportunity employment/program WIOA. Auxiliary aids and services are available upon request to individuals with disabilities."



Supportive Service**Procedures for Invoicing Dynamic Workforce Solutions**

Dear Vendor,

Please submit your invoice to MBaird@greencountryworks.org once you have received the signed voucher.

Please note: No Goods should be released to Participant – Student until you have received an assigned voucher from our Career Manager.

If you have any invoicing questions, please contact Michelle Baird, Project accountant by email or phone at 405-269-1481

Invoice Requirements:

- Standard format – PDF, Word, or Excel
- Vendor Name, Address, City, State, Zip Code and Phone Number
- Invoice Date
- Unique Invoice Number
- Participant - Student Name
- Detailed Description of Goods
 - Number of Units
 - Cost Per Unit
 - Total Cost of Unit/s
- Total Amount Payable
- Remittance Information
 - Mailing Address
 - Attention to a Specific Person or Department

Thank you,

Michelle Baird

Project Accountant

Dynamic Workforce Solutions

405-269-1481

MBaird@greencountryworks.org



"Equal opportunity employment/program WIOA. Auxiliary aids and services are available upon request to individuals with disabilities."





OSL ID #: _____

Participant Name: _____

Total Supportive Services Spent To Date: \$0.00

#	Date	Service/Item	Total Cost
1			
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GREEN COUNTRY WORKFORCE DEVELOPMENT BOARD

WIOA Title I Youth Program
Request for Stipend and Incentive

Participant Name: _____ PID #: _____

Select one: ☐ In School Youth **or** ☐ Out of School Youth**Select one:** ☐ Stipend Payment Request **or** ☐ Incentive Payment Request

Type & Benchmark#: _____

Amount Requested: _____

Pursuant to the GCWDB Stipend/Incentive Policy --

- Eligibility: Is the participant eligible to receive this stipend/incentive payment? ☐ YES ☐ NO
- Benchmark: Has the participant achieved the benchmark for success? ☐ YES ☐ NO
- Documentation: Has the attainment of the benchmark been verified? ☐ YES ☐ NO
- Note: Has a case note been entered into case notes describing the benchmark attainment and amount/request for payment? ☐ YES ☐ NO
- Quick Service (*Stipends/Incentives only*) entered into OSL? ☐ N/A ☐ YES ☐ NO

Submitted by (WIOA Staff): _____ Date: _____

WIOA Title I Youth Service Provider: _____

If approved, please send payment to: _____

APPROVED? ☐ NO**☐ YES – All necessary documentation has been accounted for, properly cataloged, and uploaded as appropriate. Payment complies with local GCWDB policy**

If not approved, please explain why:

WIOA Title I Youth Program Service Provider Authorized Signature

Date



GREEN COUNTRY WORKFORCE DEVELOPMENT BOARD

WIOA Youth Program Stipend and Incentive Brief**Virtual Job Shadow Career Exploration Incentive Payment up to \$100****Virtual Job Shadow Flex Lessons Incentive Payment up to \$50 per lesson****Virtual Job Shadow Mini Lesson Incentive Payment**

- Self Discovery up to \$100.00
- Employability Soft Skills up to \$100.00
- Time Management up to \$100
- Team Building up to \$100
- College & Career Research up to \$100
- Land the Job up to \$250
- Financial Literacy up to \$250

Post-Secondary School Enrollment Incentive Payment up to \$50.00**Attainment of High School Diploma Incentive Payment up to \$200.00****Post-Secondary Occupational Skills Training Incentive Payment**

- Career Tech Certificate/Industry Recognized Certificate up to \$100.00
- Associates Degree up to \$200.00
- Bachelor's Degree up to \$400.00

Basic Skills Deficient Incentive Payment up to \$50.00 per functioning level increase

* maximum \$200.00 in a 12-month period

Unsubsidized Employment Incentive Payment up to \$100.00

* obtaining a job or jobs that: offers a work schedule of at least thirty-two (32) hours per week, has an expected duration of at least six (6) months, and is not subsidized by any State or Federal program funding; for up to \$100.00 (one time only) after two (2) months of work

Retention in Employment Incentive Payment up to \$500.00

* successful retention in a job or jobs that: offers a work schedule of at least thirty-two (32) hours per week and is not paid for nor subsidized by State or Federal program funding; for a maximum amount of cumulative payments to an individual participant of \$500.00

Workshops and Conferences Stipend Payment up to \$60.00

* participation in a workshop or conference focusing any one of the fourteen (14) WIOA youth program elements.

- 2 hours up to \$30.00 total
- 3 hours up to \$45.00 total
- 4 or more hours \$60.00 total

Summer Employment Opportunities Stipend Payment/Incentive Payment

- up to \$25 per evaluation reflecting a measurable skill gain
- up to \$300, maximum for successful completion of academic enrichment piece
- up to \$200 total paid to youth at completion of all assigned modules to the satisfaction and completion of work experience

Regular (non-summer) Work Experience Stipend Payment/Incentive Payment

- up to \$50.00 for the first 173 hours worked \$50.00 with satisfactory performance and up to \$50.00 for perfect attendance and punctuality
- up to \$50.00 for the second 173 hours worked with satisfactory performance and up to \$50.00 for an for perfect attendance and punctuality
- up to \$50.00 for the final 174 hours worked with satisfactory performance and up to \$50.00 for an for perfect attendance and punctuality

Work Readiness Workshops Stipend Payment

- up to \$10.00 per full hour of attendance

Attaining a Career Readiness Certificate Incentive Payment

- Bronze Certificate up to \$10.00
- Silver Certificate up to \$50.00
- Gold Certificate up to \$100.00
- Platinum Certificate up to \$200.00

IMPORTANT INFORMATION: Incentives are available, as outlined in Green Country Workforce Development Board's Youth Program policy (available at <https://www.greencountryworks.org/resources/policy-research-best-practices/>), to active enrolled participants of the GCWDB Workforce Innovation and Opportunity Act (WIOA) Title I Subsection B Youth Program. All incentives must be verified for correctness and completion by case management, documented and uploaded into the state's mandated case management system.



Equal Opportunity Employer/Program. Auxiliary aids and services are available upon request for individuals with disabilities.

A proud partner of the
americanjobcenter
network

Green Country Workforce Development Board**Vital Service and Information Notice**

Pursuant to 29 CFR 38.9(g)(3), the following notice is given:

This document contains vital service information.

For people with speech or hearing loss:

To enable telephone conversation between people with speech or hearing loss and people without speech or hearing loss, please call Oklahoma Relay at 711-(<http://www.oklahomarelay.com/711.html>) or TDD/TTY: 800-722-0353.

If English is not your preferred language, please contact:

Equal Opportunity (EO) Officers

Local EO Officer

Michael Branan

Green Country Workforce Development Board, 1295 Skills Center Circle, Tahlequah, OK 74464

(918) 456-8846 Ext. 219

eo@greencountryworks.org

State EO Officer

Karla Jackson

Oklahoma Office of Workforce Development, 900 N. Stiles Ave., Oklahoma City, OK 73104

405.208.9620

eoofficer@okcommerce.gov

Notice in English

IMPORTANT! This document contains important information about your rights, responsibilities and/or benefits. It is critical that you understand the information in this document, and we will provide the information in your preferred language at no cost to you. Call (918) 456-8846 Ext. 219 for assistance in the translation and understanding of the information in this document.

Notice in Marshallese

MEĴĴE KO RELUKKUN AORŌK! Ilo pepa kein epād kōmeĴĴe ko elap aer aorōk ikkijen jīmwe, eddo im marōn ko am. Ellukun aorōk bwe kwōn jelā im meĴĴe kōn kōmeĴĴe kein. Kim naj jipañ eok kōn meĴĴe kein ilo ukook ak kajin eo kwōj kōnaan, im ejjelok wōnāān (free). Kūr tok nōmba in talpoon in (918) 456-8846 Ext. 219 ñan jipañ ko ikkijen ukook in kōmeĴĴe ko ilo pepa kein

Notice in Spanish

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