



Oklahoma Office of Workforce Development  
900 N. Portland Ave.  
Oklahoma City, OK 73107

## OKLAHOMA WORKFORCE DEVELOPMENT ISSUANCE #21-2017, Change 1

**TO:** Workforce Development Board Chairs  
Workforce Development Board Staff  
Workforce Development Fiscal Agents

**FROM:** Erin E. Risley-Baird, Executive Director

**DATE:** January 29, 2018

**SUBJECT:** Oklahoma Data Validation and Source Documentation Requirements

**PURPOSE:** The Oklahoma Office of Workforce Development (OOWD) as the Governor's chosen Workforce Innovation and Opportunity Act (WIOA) administrative entity, provides this issuance as guidance to the workforce system on the State of Oklahoma's Data Validation and Source Documentation Requirements for the WIOA Title I Programs and the Wagner-Peyser Employment Services as amended by Title III.

### REFERENCES:

- The Workforce Innovation and Opportunity Act (WIOA) of 2014 (Public Law (Pub. L. 113-128)) Title I and III
- Federal Register/Vol. 81. No.161
- U.S. Department of Labor/Employment and Training Administration Training and Employment Guidance Letter (TEGL) No. 18-16
- U.S. Department of Labor/Employment and Training Administration Training and Employment Guidance Letter (TEGL) No. 19-16
- U.S. Department of Labor/Employment and Training Administration Training and Employment Guidance Letter (TEGL) No. 21-16
- U.S. Department of Labor/Employment and Training Administration Training and Employment Guidance Letter (TEGL) No. 22-15

RESCISSIONS	EXPIRATION DATE
OWDI #21-2017	Continuing



**MESSAGE:** This Oklahoma Workforce Development Issuance (OWDI) is intended to clarify procedures that minimize the burden of documenting eligibility, service provision, and outcomes while remaining respectful of the need to ensure data integrity and report accurate information to the United States Department of Labor (USDOL). All documentation previously copied and kept in paper case files must now be electronically scanned and uploaded to participant records to develop a virtual case file.

## **General Eligibility**

### Wagner-Peyser

The Wagner-Peyser Act of 1933 established a nationwide system of public employment offices known as the Employment Service (ES). The Act was amended in 1998 and again in 2014 to become part of the Workforce Innovation and Opportunity Act and the One-Stop delivery system. The primary responsibilities of ES are to:

- Assist job seekers in finding employment and employers in filling jobs;
- Facilitate the match between job seekers and employers; and
- Meet the work test requirements of the State Unemployment Compensation system.

The types of ES services available include job search and placement assistance, recruitment services and special technical services for employers, reemployment services for unemployment insurance claimants, labor exchange services for workers who have received notice of permanent or impending layoff, referrals and financial aid application assistance for training and educational resources and programs, and the development and provision of labor market and occupational information.

ES services are available to any jobseeker, regardless of employment status; however, Veterans receive priority of service in accordance with Training and Employment Guidance Letter (TEGL) 10-09 and Veterans Program Letter (VPL) 07-09. Program participants may also include individuals with employment authorization documents who have been granted relief under the Deferred Action for Childhood Arrivals (DACA). In addition, any employer seeking workers is also eligible for ES services.

### WIOA Title I Adult and Dislocated Workers Programs

The WIOA Title I Adult and Dislocated Workers programs are designed to provide quality employment and training services to assist eligible individuals in finding and qualifying for meaningful employment.

To receive WIOA Title I Adult services, all individuals must meet the following eligibility criteria.

- 18 years of age or older
- Authorized to work in U.S.

To receive WIOA Title I Dislocated Worker services, individuals must meet the following eligibility criteria.

- Authorized to work in U.S., and
- Meet one of the following;
  - Recently Dislocated
  - Plant Closure or Substantial Layoff
  - Loss of Self-Employment Income
  - Displaced Homemaker
  - Military Spouse (Loss of employment or Displaced)

### WIOA Title I Youth Program

The WIOA Title I Youth program is designed to assist youth with one or more barriers to employment prepare for post-secondary education and employment opportunities, attain educational and/or skills training credentials, and secure employment with career and promotional opportunities.

To receive WIOA Title I Youth services, individuals must meet the following eligibility criteria.

#### In-School Youth:

- Attending school
- 14-21 years of age
- Low Income
- At least one of the following must apply:
  - Basic Skills Deficient
  - An English Language Learner
  - An offender
  - A homeless youth or runaway youth
  - In foster care or has aged out of foster care
  - Pregnant or parenting
  - Individual with a disability
  - Meet the requirement of “Needs Additional Assistance” \*Not more than 5% of the newly enrolled ISY in a given program year may be eligible based on this criterion.

#### Out-of-School Youth:

- 16-24 years of age
- Not attending any school
- At least one of the following must apply:
  - Individual with a disability
  - School dropout

- Within the age of compulsory school attendance, but has not attended school for at least the most recent complete school year calendar quarter
- A recipient of a secondary school diploma or its recognized equivalent who is low income and either an English language learner or basic skills deficient
- An offender
- A homeless youth or a runaway youth
- In foster care or has aged out of foster care
- Pregnant or parenting
- An individual who is low income and “needs additional assistance” to enter or complete an educational program or to secure or hold employment.

5% Exception:

WIOA allows a low-income exception where 5% of youth may be participants who ordinarily would be required to be low-income for eligibility purposes and meet all other eligibility criteria for WIOA youth except the low-income criteria. A program must calculate the 5% based on the percent of newly enrolled youth in the local area’s WIOA youth program in a given program year who would ordinarily be required to meet the low-income criteria.

Trade Adjustment Act (TAA)

TAA offers a variety of benefits and services to support workers in their search for reemployment. This includes Trade Readjustment Allowances, training, assistance with healthcare premium costs, Reemployment Trade Adjustment Assistance, job search, and relocation allowances. A group of workers may be eligible for TAA if their jobs are lost or threatened due to trade-related circumstances as determined by a USDOL investigation.

In order for workers to obtain TAA or Alternative Trade Adjustment Assistance (ATAA) services and benefits, an employer of a group of workers, a group of three or more workers, a Union, or another authorized individual must first file a petition with the U.S. Department of Labor (USDOL) and the state trade coordinator or dislocated worker unit to request a certification of group eligibility for workers adversely affected by foreign trade. Once the group certification is issued, each worker in the group must then individually apply for services and benefits through their local Oklahoma Works (one-stop) Center. A OESC case manager will issue a determination of the workers’ individual eligibility for TAA benefits.

The following eligibility requirements apply to the TAA program:

- An approved TAA certification; and
- Other criteria as determined by the types of benefits and services.

## National Farmworkers Job Program (NFJP)

The NFJP provides job training, employment assistance, and other supportive services to migrant and seasonal farmworkers and their dependents with the goal of helping farmworkers secure full-time employment.

In order for workers to obtain NFJP services and benefits, an individual **must meet criterion A and B** as defined in 20 CFR 685.11:

- A. An individual must be either a(n):
- Eligible seasonal farmworker adult;
  - Eligible migrant farmworker adult;
  - Eligible migrant seasonal farmworker (MSFW) youth; or
  - Dependent of a MSFW.

**AND**

- B. A low income individual who faces multiple barriers to economic self-sufficiency.

Other Key Requirements – Male participants must not have violated section 3 of the Military Selective Service Act (50 U.S.C. App. 453) by not presenting and submitting to registration as required. In addition, program participants may include individuals with employment authorization documents who have been granted relief under the Deferred Action for Childhood Arrivals (DACA).

Refer to Training and Employment Guidance Letter (TEGL) 18-16 and state program policy to provide definitions and clarification for the NFJP eligibility criteria.

### **Priority of Service**

Veterans and eligible spouses continue to receive priority of service for all DOL-funded employment training programs, which include WIOA programs.

When using WIOA Adult funds to provide individualized career services and/or training services, and after veterans and eligible spouses have received priority, Oklahoma Works (one-stop) Center staff must give priority to public assistance recipients, other low income individuals (as defined in WIOA section 3(36)), and individuals who are basic skills deficient (as defined in WIOA 3(5)). English language learners meet the criteria for “basic skills deficient” and must be included in the priority populations for the title I Adult program. Under WIOA, priority of service must be implemented regardless of the level of funds available to provide services in the local area.

For the WIOA Dislocated Worker program, the only priority of service is the veteran’s priority of service. A veteran must, however, meet each program’s eligibility criteria to receive services under the respective employment and training program.

Due to the statutorily required priority for Adult funds, priority must be provided in the following order:

- First, to veterans and eligible spouses who are also included in the groups given statutory priority for WIOA Adult formula funding. This means that veterans and eligible spouses who are also recipients of public assistance, other low-income individuals, or individuals who are basic skills deficient receive first priority for services provided with WIOA Adult formula funds for individualized career services and training services.
- Second, to non-covered persons (that is, individuals who are not veterans or eligible spouses) who are included in the groups given priority for WIOA Adult formula funds.
- Third, to veterans and eligible spouses who are not included in WIOA's priority groups.
- Fourth, to priority populations established by the LWDB (for example, for non-covered persons who are not included in groups given priority for WIOA Adult formula funds, such as persons living within a designated Promise Zone).
- Last, to non-covered persons outside the groups given priority under WIOA.

### **Pending List:**

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

### **Source Documentation and Data Validation**

Source documentation is required as indicated in the attached table for each data element. One source document from each applicable list is sufficient to meet documentation requirements for eligibility criteria. Some data elements may require more than one source document this will be noted by an **"AND"** in the Acceptable Source Document column in the Eligibility/Data Validation Guide.

Documents must be validated using one of two types of methods: Match or Support. The validation rules are as follows:

- Match: the data collected or reported in OKJobMatch must be the same as the data in the source documentation.
- Support: the uploaded source documentation must provide evidence that the data collected or reported in OKJobMatch is correct.

All information entered into OKJobMatch must be verified. This may be done by a participant virtual signature (self-attestation), uploaded documentation, or detailed case/program notes.

**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 OKJobMatch 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. Staff must review the information with the participant as it is entered in the Universal Demographics screen. 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.

Case Managers with the Veterans and TAA programs have the ability to provide Individual Career Services for participants who are not available to provide a virtual signature in person. In these instances, the Veterans Program or TAA Program case manager may sign the attestation and indicated either the demographics and or the IEP was updated by the case manager.

**Uploaded Documentation:** Documentation must be clear and legible copies that are uploaded into OKJobMatch under the Uploaded Documentation section of the Client's Case Details Page. 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:

- Documentation Item Type:
  - Universal: Documentation use 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 Documentation: multiple types of documentation can be chosen
  - Eligibility: if documentation was used to determine eligibility
  - Validation: if documentation was used to validate data/information entered into OKJobMatch
  - Supporting: if documentation is used to support a service and training entry or case/program note entered into OKJobMatch.
  - Follow-up: documentation to support follow-up services
  - Employment Planning: documentation used to support employment planning
- Data Elements to be verified: Varies by enrollment. If multiple enrollments are chosen, you will be required to choose the applicable data element for each enrollment.

**Detailed Case/Program Notes:** Statements by the case manager entered in the virtual case management system that identify at a minimum, the specific data element, the status of the data element, information relevant to the data element, the date on which the information was obtained, and the case manager who obtained the information.

If a case manager is obtaining information verifying any data element for validation by phone, the detailed case/program note must include data element, subject to be verified, date verified, the agency or third party relationship providing verification, contact name, phone number, detailed comments from the contact, and the case manager who obtained the information.

**Applicant Statement:** The applicant statement may be used in limited circumstances to document low income for participants when income is not verifiable for the prior 6 months of the enrollment date or 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 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, and supported by a corroborative contact or reliable witness signature attesting to the accuracy of the statement. The applicant statement must be signed by the participant, reliable witness, and case manager.

### **Data Validation Review**

The U.S. Department of Labor, Employment and Training Administration, requires states to validate the accuracy of their annual performance report submissions to ensure decisions about WIOA policy and funding are made based on a true picture of program outcomes.

Annual data element validations are conducted to ensure the data elements in participant records are accurate in order to maintain system integrity, ensure completeness of data, and to identify and correct specific issues associated within the reporting process.

**Data Element & Source Documentation Validation Process:** The intent of this process is to ensure the accuracy of data entered into OKJobMatch and subsequently submitted to USDOL-ETA.

- Local Area staff collect data elements and documentation supporting data elements on an ongoing basis. This data collection becomes the foundation for the data validation efforts performed annually.
- During the annual validation, a list of Participant Identification (PID) numbers will be generate a valid and reliable random sample based on the Participant Individual Record Layout (PIRL) file provided for the annual performance report.



- A worksheet for each PID will be created from the PIRL file that contains all applicable data elements and documentation reported during the reporting period, to be validated.
- The State Data Validation Unit will validate the worksheets against the source documentation in the participant’s file in OKJobMatch to ensure compliance with federal and state guidance.
- The State Data Validation Unit will score each data element as either a pass or fail for validation that applies to each participant. Each data element that is required to be validated and that is supported or matched by acceptable documentation is scored as a “pass”. Conversely, any data element required to be validated that is *not* supported by acceptable documentation, or is *inconsistent* with other documentation, is scored as a “fail”. Thus, data elements lacking properly labeled or unreadable source documents will be scored as “fail”, even if the documentation is in the file.
- Once completed, the worksheet is transmitted to the State Performance Reporting Unit where the pass/fail ratio will be calculated, reviewed, and used to determine the local areas combined pass/fail ratio. The local area will receive an initial report at the close of the review process in which the local area’s combined pass/fail ratio will be included.
- The local area pass/fail ratio must be below a 5% reporting error rate (95% confidence interval) to be considered a combined passing report for the area.
- If the local area’s pass/fail ratio is below the 5% reporting error rate, the local area will have 30 days to review and communicate in writing, with OOWD, any concerns or questions regarding the report. After the 30-day timeframe, OOWD will issue a final determination report to the Local Area and USDOL.
- If the local areas pass/fail ratio is above the 5% reporting error rate, the local area must research, analyze case files, policy and/or procedure and training plans in an effort to remedy each specified data element above the 5% reporting error rate within 60 days of receipt of the initial finding report. After the research effort is complete or at the end of the 60-day timeframe, the local area will provide to OOWD within 30 days, an action plan with proposed resolutions for each of the specified data elements. Within 30 days, OOWD will review the Action Plan and issue a final determination report to the Local Area and USDOL.

**EQUAL OPPORTUNITY AND NONDISCRIMINATION STATEMENT:** All Recipients, and Sub recipients/Sub grantees must comply with WIOA’s Equal Opportunity and Nondiscrimination provisions which prohibit discrimination on the basis of race, color, religion, sex (including pregnancy, childbirth, and related medical conditions, transgender status, and gender identity), national origin (including limited English proficiency), age, disability, political affiliation or belief, or, for beneficiaries, applicants, and participants only, on the basis of citizenship status or participation in a WIOA Title-I financially assisted program or activity.

**ACTION REQUIRED:** This Oklahoma Workforce Development Issuance (OWDI) is to become a part of your permanent records and made available to appropriate staff and sub-recipients.

**INQUIRIES:** If you have any questions about this issuance, please contact policy and program staff in the Oklahoma Office of Workforce Development. Contact information can be found at <http://www.oklahomaworks.gov/about/>.

**ATTACHMENTS:**

Attachment A: Income Eligibility Form

Attachment B: Client Involvement Statement

Attachment C: Individual Training Account Agreement Form

Attachment D: Individual training Voucher Form

Attachment E: Coordination of Training Funds

Attachment F: Youth Eligibility Form

Attachment G: Youth Support Form

Attachment H: School Dropout Status Form

Attachment I: Youth Training Provider Procurement Form

Attachment J: Documents to Verify Eligibility to Work

Attachment K: Applicant Statement

Attachment L: WIOA Participant Supplemental Wage Quarterly Exit Data Collection Form

Attachment M: Supplemental Wage Self-Employment Verification Form

Attachment N: Wage Conversion Chart

# WIOA Title I Adult, Dislocated Worker, and the Wagner-Peyser Employment Service as amended by Title III Eligibility Source Documentation Guide

Data Element	Definitions and Requirements	Acceptable Source Document
Age/Date of Birth (WIOA)	WIOA Adult and Dislocated Worker (DLW) applicants must be 18 or older at the time of program enrollment.	<p><b>MATCH</b></p> <p><b><u>Basic Demographic Characteristics &amp; Basic Career Service Requirement</u></b></p> <ul style="list-style-type: none"> <li>• Participant self-attestation;</li> </ul> <p><b>AND</b></p> <ul style="list-style-type: none"> <li>• Detailed Client Note which includes uniquely identifiable information verified from a source document from the list below.</li> </ul> <p><b><u>Individual Career Service &amp; Training Service Requirement</u></b></p> <ul style="list-style-type: none"> <li>• Baptismal Record</li> <li>• Birth Certificate</li> <li>• DD-214 (Report of Transfer or Discharge Paper)</li> <li>• Driver’s License</li> <li>• Federal, State, or Local Government ID Card</li> <li>• Hospital Record of Birth</li> <li>• Passport</li> <li>• Public Assistance/Social Service Records</li> <li>• School Records or School ID (with date of birth)</li> <li>• Work Permit</li> <li>• Cross-match with Department of Vital Statistics</li> <li>• Tribal Records</li> <li>• Court Records</li> </ul>

# WIOA Title I Adult, Dislocated Worker, and the Wagner-Peyser Employment Service as amended by Title III Eligibility Source Documentation Guide

<p>Selective Service Registration</p>	<p>All males who are at least 18 years of age and born after December 31, 1959, and who are not in the armed service on active duty, must be register with the Selective Service (SS).</p> <p>Males who cannot provide proof of SS Registration must be referred to the SS for registration.</p>	<p><b>MATCH</b></p> <p><b><u>Basic Demographic Characteristic &amp; Basic Career Service Requirement</u></b></p> <ul style="list-style-type: none"> <li>• Participant self-attestation;</li> <li><b>AND</b></li> <li>• Detailed Client Note verifying a source document from the list below</li> </ul> <p><b><u>Individual Career Service &amp; Training Service Requirement</u></b></p> <ul style="list-style-type: none"> <li>• Selective Service Registration Card</li> <li>• Selective Service Status Information Letter</li> <li>• Selective Service Registration (Form 3A)</li> <li>• Selective Service Verification Form</li> <li>• Stamped Post Office Receipt of Registration</li> <li>• US Selective Service Verification (Internet) <a href="http://www.sss.gov">www.sss.gov</a></li> </ul> <p>The following documents may be used only if the participate is past the age of 26 and has not registered with the Selective Service.</p> <ul style="list-style-type: none"> <li>• DD-214</li> <li>• Current Military ID</li> </ul>
<p>Eligible to Work in the United States</p>	<p>The participant must be eligible to work in the United States at the time of program enrollment.</p> <p>Youth ages 16 and older must be eligible to work in the United States at the time of participation.</p>	<p><b>MATCH</b></p> <p><b><u>Basic Demographic Characteristic &amp; Basic Career Service Requirement</u></b></p> <ul style="list-style-type: none"> <li>• Participant self-attestation</li> </ul> <p><b><u>Individual Career Service &amp; Training Service Requirement</u></b></p> <ul style="list-style-type: none"> <li>• Verification Documents from List A of Attachment J</li> <li>• Verification Documents from List B &amp; C of Attachment J</li> </ul>

## WIOA Title I Adult, Dislocated Worker, and the Wagner-Peyser Employment Service as amended by Title III Eligibility Source Documentation Guide

<p>Equal Opportunity Statement</p>	<p>Equal Opportunity Statement must be provided for each participant.</p> <p>The Equal Opportunity (EO) Statement is available on the Case Details page under Universal Information. Staff must review the EO Statement with the participant and provide a printed copy for signature. To print the EO Statement from the Universal information page: Click on Printable Version, choose EEO Notice, Print preview, and print. The participant and staff may then sign the form.</p>	<p><b>MATCH</b></p> <ul style="list-style-type: none"> <li>• Equal Opportunity Statement</li> </ul>
<p>Client Release</p>	<p>A Client Release is required for each participant.</p> <p>A participant may virtually sign the Online Client Release located in the Case Details page under Universal Information. You may also choose to utilize the printable Client Release for an actual signature.</p>	<p><b>MATCH</b></p> <ul style="list-style-type: none"> <li>• Client Release</li> </ul>

# WIOA Title I Adult, Dislocated Worker, and the Wagner-Peyser Employment Service as amended by Title III Eligibility Source Documentation Guide

<p>Dislocated Worker (WIOA)</p>	<p>An Individual who meets one of the 5 categories below:</p> <p><b>1) Recently Dislocated:</b>          (a) has been terminated or laid off, or has received a notice of termination or layoff, from employment; <b>AND</b>          (b) is eligible for or has exhausted entitlement to unemployment compensation; <u>or</u> has been employed for a duration sufficient to demonstrate attachment to the workforce, but is not eligible for unemployment compensation due to insufficient earnings or having performed services for an employer that were not covered under a State unemployment compensation law; <b>AND</b>          (c) is <u>unlikely</u> to return to a previous industry or occupation</p> <p><b>2) Permanent closure / Substantial Layoff:</b>          (a) has been terminated or laid off, or has received a notice of termination or layoff, from employment as a result of any permanent closure of, or any substantial layoff at, a plant, facility, or enterprise; or          (b) is employed at a facility at which the employer has made a general announcement that such facility will close within 180 days; or          (c) for purposes of eligibility to receive services other than training services, career services, or supportive services, is employed at a facility at which the employer has made a general announcement that such facility will close</p> <p><b>3) Self-Employed:</b>          (a) was self-employed (including employment as a farmer, a rancher, or a fisherman) but is unemployed as a result of general economic conditions in the community in which the participant resides or</p>	<p><b>SUPPORTING</b></p> <p><b><u>Eligibility Verification, Career Service &amp; Training Service Requirement</u></b></p> <p><b>1) Recently Dislocated:</b></p> <ul style="list-style-type: none"> <li>• Notice of Layoff</li> <li>• TAA Certification</li> <li>• Participant self-attestation, with detailed program note <b>AND</b></li> <li>• Current unemployment insurance verification</li> <li>• Current Reemployment Service Registration <b>AND</b></li> <li>• Labor Market Information that indicates lack of industry/occupation availability</li> <li>• Doctors statement indicating inability to return to previous industry/occupation due to physical limitations</li> <li>• Participant self-attestation</li> </ul> <p><b>2) Permanent Closure / Substantial Layoff:</b></p> <ul style="list-style-type: none"> <li>• Notice of Layoff</li> <li>• Written Employer Statement</li> <li>• Media Announcement with employment verification (pay stub, etc.)</li> <li>• TAA Certification</li> <li>• WARN listing affected employees</li> </ul> <p><b>3) Self-Employed:</b></p>
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# WIOA Title I Adult, Dislocated Worker, and the Wagner-Peyser Employment Service as amended by Title III Eligibility Source Documentation Guide

<p>because of natural disasters;</p> <p><b>4) Displaced Homemaker:</b> An individual who has been providing unpaid services to family members in the home and who:</p> <p>(a) has been dependent on the income of another family member but is no longer supported by that income: or</p> <p>(b) is the dependent spouse of a member of the Armed Forces on active duty and whose family income is significantly reduced because of deployment, a call or order to active duty, a permanent change of station, or the service-connected death or disability of the member; <b>AND</b></p> <p>(c) is unemployed or underemployed and is experiencing difficulty in obtaining or upgrading employment.</p> <p><b>5) Military Spouse:</b> (a) is the spouse of a member of the Armed Forces on active duty, and who has experienced a loss of employment as a direct result of relocation to accommodate a permanent change in duty station of such member; or</p> <p>(b) is the spouse of a member of the Armed Forces on active duty and who is unemployed or underemployed and is experiencing difficulty in obtaining or upgrading employment.</p> <p>* It is important to keep in mind that some categories will require more than one document to verify eligibility.</p>	<ul style="list-style-type: none"> <li>• Bankruptcy documents listing both the name of the business and the individuals name</li> <li>• Business License</li> <li>• Most Recent Tax Return</li> <li>• Participant self-attestation</li> </ul> <p><b>AND</b></p> <ul style="list-style-type: none"> <li>• Documentation showing disaster caused business closure</li> <li>• Documentation showing poor economic condition in the community or surrounding area caused business closure</li> </ul> <p><b>4) Displaced Homemaker:</b></p> <ul style="list-style-type: none"> <li>• Divorce Papers</li> <li>• Court Records</li> <li>• Spouse’s layoff notice</li> <li>• Spouse’s death records</li> <li>• Military Orders</li> <li>• Participant self-attestation</li> </ul> <p><b>AND</b></p> <ul style="list-style-type: none"> <li>• Current unemployment insurance verification</li> <li>• Pay stubs</li> <li>• Public Assistance Records</li> <li>• Participant self-attestation</li> </ul> <p><b>5) Military Spouse:</b></p> <ul style="list-style-type: none"> <li>• Military Orders (i.e. Permanent Change of Station (PCS) Orders)</li> </ul> <p><b>AND</b></p> <ul style="list-style-type: none"> <li>• Marriage License</li> </ul> <p><b>AND</b></p> <ul style="list-style-type: none"> <li>• Current unemployment insurance verification</li> <li>• Pay stubs</li> <li>• Public Assistance Records</li> </ul>
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		<ul style="list-style-type: none"> <li>• Participant self-attestation</li> </ul>
<p>Date of Actual Dislocation</p>	<p>The individual's date of actual separation or dislocation from employment is the last day of employment at the dislocation job. This does not apply if there is no dislocation job such as in a displaced homemaker that did not work outside of the home.</p> <p><b>TAA:</b> The individual's most recent date of separation from trade-impacted employment that qualifies the participant to receive benefits and/or services under the Trade Act.</p>	<p><b>MATCH</b></p> <p><b><u>Eligibility Verification, Career Service &amp; Training Service Requirement</u></b></p> <ul style="list-style-type: none"> <li>• Employer Verification</li> <li>• Rapid Response List</li> <li>• Notice of Layoff</li> <li>• Public Announcement with UI verification</li> <li>• Participant self-attestation</li> </ul>



# WIOA Title I Adult, Dislocated Worker, and the Wagner-Peyser Employment Service as amended by Title III Eligibility Source Documentation Guide

<p>Ethnicity: Hispanic/Latino</p>	<p>An individual indicates that he/she is a person of Cuban, Mexican, Puerto Rican, South or Central American, or other Spanish culture in origin, regardless of race.</p>	<p><b><u>Basic Demographic Characteristic Requirement</u></b></p> <ul style="list-style-type: none"> <li>Participant self-attestation</li> </ul>
<p>Race</p>	<p>Indicate which race the individual indicates:</p> <p>(a) American Indian or Alaska Native: a member of an Indian tribe, band, nation, or other organized group or community, including any Alaska Native village or regional or village corporation which is recognized as eligible for the special programs and services provided by the United States to Indians because of their status as Indians.</p> <p>(b) Asian or Asian American: any of the original peoples of the Far East, Southeast Asia, or the Indian Subcontinent (e.g., India, Pakistan, Bangladesh, Sri Lanka, Nepal, Sikkim, and Bhutan). This area includes, for example, Cambodia, China, Japan, Korea, Malaysia, Pakistan, the Philippine Islands, Thailand, and Vietnam.</p> <p>(c) Black or African American: any of the black racial groups of Africa</p> <p>(d) Native Hawaiian or Other Pacific Islander: any of the original peoples of Hawaii, Guam, Samoa, or other Pacific Islands.</p> <p>(e) White or Caucasian: any of the original peoples of Europe, the Middle East, or North Africa</p>	<p><b><u>Basic Demographic Characteristic Requirement</u></b></p> <ul style="list-style-type: none"> <li>Participant self-attestation</li> </ul>
<p>Family Size</p>	<p>For documentation and income verification a “family” is defined as two or more persons related by blood, marriage, or decree of court, who are living in a single residence, and are included in one or more of the following categories:</p> <ul style="list-style-type: none"> <li>A married couple and dependent children;</li> <li>A parent or guardian and dependent children; or</li> <li>A married couple</li> </ul> <p>An individual with a disability may be treated as a family of one for income eligibility determination purposes.</p>	<p><b><u>Basic Demographic Characteristic Requirement</u></b></p> <ul style="list-style-type: none"> <li>Participant self-attestation</li> </ul>

# WIOA Title I Adult, Dislocated Worker, and the Wagner-Peyser Employment Service as amended by Title III Eligibility Source Documentation Guide

<p>School Status at Program Entry (WIOA)</p>	<p>School Status at Program Entry is:</p> <ul style="list-style-type: none"> <li>• <b>In-School, Secondary School or Less:</b> an individual who has not received a secondary school diploma or its recognized equivalent and is attending any primary or secondary school (including elementary, intermediate, junior high school, whether full or part-time), or is between school terms and intends to return to school.</li> <li>• <b>In-School, Alternative School:</b> an individual who has not received a secondary school diploma or its recognized equivalent and is attending an alternative high school or an alternative course of study approved by the local educational agency whether full or part-time, or is between school terms and is enrolled to return to school.</li> <li>• <b>In-School, Postsecondary School:</b> an individual who has received a secondary school diploma or its recognized equivalent and is attending a postsecondary school or program (whether full or part-time), or is between school terms and is enrolled to return to school.</li> <li>• <b>Not Attending School or Secondary School Dropout:</b> an individual who is not within the age of compulsory school attendance; and is no longer attending any school and has not received a secondary school diploma or its recognized equivalent.</li> <li>• <b>Not attending school; Secondary School Graduate or has a Recognized Equivalent:</b> an individual who is not attending any school and has either graduated from secondary school or has attained a secondary school equivalency.</li> <li>• <b>Not attending School: Within Age of Compulsory School Attendance:</b> an individual who is within the age of compulsory school attendance, but is not attending school and has not received a secondary school diploma or its recognized equivalent.</li> </ul>	<p><b>SUPPORTING</b></p> <p><b><u>Basic Demographic Characteristic</u></b></p> <ul style="list-style-type: none"> <li>• Participant self-attestation</li> </ul> <p><b><u>Career Service &amp; Training Service Requirement</u></b></p> <ul style="list-style-type: none"> <li>• Secondary School Diploma or Recognized equivalent</li> <li>• Attendance Record</li> <li>• Transcripts</li> <li>• School Documentation</li> <li>• Dropout letter</li> <li>• School Dropout Status Form – Attachment H</li> <li>• Participant self-attestation</li> </ul>
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# WIOA Title I Adult, Dislocated Worker, and the Wagner-Peyser Employment Service as amended by Title III Eligibility Source Documentation Guide

<p>Highest Educational Level Completed at Program Entry (WIOA)</p>	<p>Define the highest educational level completed by the individual at program entry:</p> <ol style="list-style-type: none"> <li>a) Record the number of last school grade completed 1-12</li> <li>b) High School Graduate</li> <li>c) High School Certificate of Attendance/Completion: A participant with a disability receives a certificate as a result of successfully completing an Individualized Education Program (IEP)</li> <li>d) Attained Certificate of Equivalency for a HS Diploma</li> <li>e) 1 Yr College/FT Technical or Vocational School</li> <li>f) 2 Yr College/FT Technical or Vocational School</li> <li>g) Vocational/Technical Degree</li> <li>h) Associate's Degree</li> <li>i) Bachelor's Degree or Equivalent</li> <li>j) Professional Degree</li> <li>k) Education beyond the Bachelor's Degree</li> <li>l) Master's Degree</li> <li>m) Doctoral Degree</li> <li>n) Occupational Skills License or Certification</li> </ol>	<p><b><u>Basic Demographic Characteristic Requirement</u></b></p> <ul style="list-style-type: none"> <li>• Participant self-attestation</li> </ul>
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# WIOA Title I Adult, Dislocated Worker, and the Wagner-Peyser Employment Service as amended by Title III Eligibility Source Documentation Guide

## Priority Population Source Documentation

**The only priority of service for the Dislocated Worker Program is the Veteran’s priority of service.**

**Adult priority of service must clearly be defined in Local Policy and appropriate source documentation must be uploaded into OKJobMatch. Some documentation may be source documents for more than one characteristic and need only to be uploaded one time provided all characteristics are indicated prior to the upload.**

<p>Veteran Status</p>	<p>An individual who served on active duty in the armed forces and who was discharged or released from such service under conditions other than dishonorable.</p>	<p><b><u>Basic Demographic Characteristic Requirement</u></b></p> <ul style="list-style-type: none"> <li>• Participant self-attestation</li> </ul> <p><b><u>Career Service &amp; Training Service Requirement</u></b></p> <ul style="list-style-type: none"> <li>• DD-214</li> <li>• Letter from the Veterans Administration</li> <li>• Cross-Match with Veterans Data</li> </ul> <p>*If a source document is not available at the time a service is provided a case note must be entered indicating that program service was provided in keeping with the Veterans Priority of Service Policy and that the documentation will be obtained when the veteran returns for additional services.</p>
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# WIOA Title I Adult, Dislocated Worker, and the Wagner-Peyser Employment Service as amended by Title III Eligibility Source Documentation Guide

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

# WIOA Title I Adult, Dislocated Worker, and the Wagner-Peyser Employment Service as amended by Title III Eligibility Source Documentation Guide

Transitioning Service Member	An individual who is on active military duty status (including separation leave) with the U.S. armed forces and within 24 months of retirement or 12 months of separation from the armed forces.	<p><b><u>Basic Demographic Characteristic Requirement</u></b></p> <ul style="list-style-type: none"> <li>Participant self-attestation</li> </ul>
Campaign Veteran	<p>An individual is an eligible veteran who served on active duty in the U.S. armed forces during a war or in a campaign or expedition for which a campaign badge or expeditionary medal has been authorized as identified and listed by the Office of Personnel Management (OPM).</p> <p>A current listing of the campaigns can be found at OPM's website <a href="http://www.opmlgov/policy-data-oversight/veterans-services/vet-guide">http://www.opmlgov/policy-data-oversight/veterans-services/vet-guide</a></p>	<p><b><u>Basic Demographic Characteristic Requirement</u></b></p> <ul style="list-style-type: none"> <li>Participant self-attestation</li> </ul>
Homeless Veteran	<p>An individual who served in the active military, naval, or air service, and who was discharged or released from such service under conditions other than dishonorable, and who lacks a fixed, regular, and adequate night time residence. This definition includes any individual who has a primary night time residence that is a publicly or privately operated shelter for temporary accommodation; an institution providing temporary residence for participants intended to be institutionalized; or a public or private place not designated for or ordinarily used as a regular sleeping accommodation for human beings.</p> <p>*This definition does not include a participant imprisoned or detained under an Act of Congress or State law. A participant who may be sleeping in a temporary accommodation while away from home should not, as a result of that alone, be recorded as homeless.</p>	<p><b><u>Basic Demographic Characteristic Requirement</u></b></p> <ul style="list-style-type: none"> <li>Participant self-attestation</li> </ul>
Homeless Veterans' Reintegration Program Participant	An individual who is a veteran who is enrolled in the Homeless Veterans' Reintegration Program (HVRP), Incarcerated Veterans Transition Program (IVTP), or Homeless Female Veterans and Veterans with Families (HFVWWF) Reintegration Program in their area.	<p><b><u>Basic Demographic Characteristic Requirement</u></b></p> <ul style="list-style-type: none"> <li>Participant self-attestation</li> </ul>

# WIOA Title I Adult, Dislocated Worker, and the Wagner-Peyser Employment Service as amended by Title III Eligibility Source Documentation Guide

<p>Disabled Veteran</p>	<p>An individual who is a veteran who served on active duty in the U.S. armed forces and who is entitled to compensation regardless of rating (including those rated at 0%); or who but for the receipt of military retirement pay would be entitled to compensation, under laws administered by the Department of Veterans Affairs (DVA); or was discharged or released from active duty because of a service-connected disability. OR An individual who is a veteran who served on active duty in the U.S. armed forces and who is entitled to compensation (or who, but for the receipt of military retirement pay would be entitled to compensation) under laws administered by the DVA for a disability, (i) rated at 30 percent or more or, (ii) rated at 10 or 20 percent in the case of a veteran who has been determined by DVA to have a serious employment handicap.</p>	<p><b><u>Basic Demographic Characteristic Requirement</u></b></p> <ul style="list-style-type: none"> <li>• Participant self-attestation</li> </ul>
<p>English Language Learner at Program Entry (WIOA)</p>	<p>An Individual at program entry who has limited ability in speaking, reading, writing or understanding the English language and also meets at least one of the following two conditions: a) His or her native language is a language other than English, or b) He or she lives in a family or community environment where a language other than English is the dominant language.</p>	<p><b>SUPPORTING</b></p> <p><b><u>Basic Demographic Characteristic Requirement</u></b></p> <ul style="list-style-type: none"> <li>• Participant self-attestation</li> </ul> <p>*If the participant is an English language learner and answered <b>YES</b>: you <u>must</u> identify the Primary Language of the individual.</p>
<p>Single Parent at Program Entry (WIOA)</p>	<p>An individual who at program entry, is single, separated, divorced or a widowed individual who has primary responsibility for one or more dependent children under age 18 (including single pregnant women).</p>	<p><b>SUPPORTING</b></p> <p><b><u>Basic Demographic Characteristic Requirement</u></b></p> <ul style="list-style-type: none"> <li>• Participant self-attestation</li> </ul> <p><b><u>Career Service &amp; Training Service Requirement</u></b></p> <ul style="list-style-type: none"> <li>• Detailed Program Note</li> </ul>

# WIOA Title I Adult, Dislocated Worker, and the Wagner-Peyser Employment Service as amended by Title III Eligibility Source Documentation Guide

Individual with a Disability (WIOA)	<p>An individual may indicate that he/she has a disability as defined as a physical or mental impairment that substantially limits one or more of the person’s major life activities. Applicable categories are:</p> <ul style="list-style-type: none"> <li>• Physical/Chronic Health Conditions</li> <li>• Physical/Mobility Impairments</li> <li>• Mental or Psychiatric Disability</li> <li>• Vision-related Disability</li> <li>• Hearing-related Disability</li> <li>• Learning Disability</li> <li>• Cognitive/Intellectual Disability</li> <li>• Participant may choose not to disclose type of disability</li> </ul>	<p><b><u>Basic Demographic Characteristic Requirement</u></b></p> <ul style="list-style-type: none"> <li>• Participant self-attestation</li> </ul>
Individual with a Disability services	<p>Is the individual with a disability receiving services funded by a Local and/or State Agency by any of the following:</p> <ul style="list-style-type: none"> <li>• State Developmental Disabilities Agency (SDDA)</li> <li>• Local and State Mental Health Agency (LSMHA)</li> <li>• State Medicaid Home &amp; Community-Based Services (HCBS) waiver</li> </ul>	<p><b><u>Basic Demographic Characteristic Requirement</u></b></p> <ul style="list-style-type: none"> <li>• Participant self-attestation</li> </ul>
Individual With A Disability Work Setting	<p>Determine if the individual with a disability is participating in one of the following work settings:</p> <ul style="list-style-type: none"> <li>• Competitive Integrated Employment</li> <li>• Individual Supported Employment (e.g. use of job coach, with integrated placement at competitive wages)</li> <li>• Group Supported Employment (i.e., work crews, enclaves, etc.)</li> <li>• Sheltered Workshop (i.e., center- or facility-based employment)</li> <li>• Combination of two or more settings</li> </ul>	<p><b><u>Basic Demographic Characteristic Requirement</u></b></p> <ul style="list-style-type: none"> <li>• Participant self-attestation</li> </ul>
Individual With A Disability Type of Customized Employment Services Received	<p>Determine if the individual with a disability has received one of the following Customized Employment Services (CES):</p> <ul style="list-style-type: none"> <li>• Discovery assessment Services</li> <li>• Developed a Customized Employment Search Plan</li> <li>• Employer Negotiation Services</li> <li>• Secured Employment as a result of Receiving Customized Employment Services and Received Extended Support Services</li> </ul>	<p><b><u>Basic Demographic Characteristic Requirement</u></b></p> <ul style="list-style-type: none"> <li>• Participant self-attestation</li> </ul>



# WIOA Title I Adult, Dislocated Worker, and the Wagner-Peyser Employment Service as amended by Title III Eligibility Source Documentation Guide

<p>Individual With A Disability Financial Capability</p>	<p>Determine if the individual with a disability has received one of the following:</p> <ul style="list-style-type: none"> <li>• Benefit planning services</li> <li>• Financial Capability/Asset Development Services</li> <li>• Benefit Planning Services and Financial Capability/Asset Development Services</li> </ul>	<p><b><u>Basic Demographic Characteristic Requirement</u></b></p> <ul style="list-style-type: none"> <li>• Participant self-attestation</li> </ul>
<p>Individual With a Disability Individualized Education Program Participant</p>	<p>Determine if the individual with a disability has a Current or had a Previous Individualized Education Program / Special Education Services plan while attending Secondary School.</p> <p>An Individualized Education Program (IEP) is a plan used to ensure that students with disabilities are eligible to receive special education and related services under the Individuals with Disabilities Education Act and receive services tailored to meet their unique needs in the least restrictive environment to prepare them for further education, employment, and independent living (34 C.F.R. §300.340). To be eligible the student generally must be between ages 3 and 21, have a qualifying disability in one of the allowable categories that affects his or her educational performance, and be in need of special education and related services.</p>	<p><b><u>Basic Demographic Characteristic Requirement</u></b></p> <ul style="list-style-type: none"> <li>• Participant self-attestation</li> </ul>
<p>Individual With a Disability Section 504 Plan</p>	<p>Determine if the individual with a disability has a Section 504 Plan</p> <p>Section 504, of the Rehabilitation Act, 29 U.S.C. § 794, is a federal law that protects students with disabilities that interfere with their ability to learn or access school programs from discrimination by schools receiving Federal financial assistance. Under Section 503 students are entitled to receive a free and appropriate education comparable to students without disabilities. A Section 504 Plan can be used to get reasonable accommodations for an individual with a disability that falls outside of the 13 disability categories required under Individuals with Disabilities Education Act (IDEA), or who does not need special education and related services. A Section 504 plan outlines how the</p>	<p><b><u>Basic Demographic Characteristic Requirement</u></b></p> <ul style="list-style-type: none"> <li>• Participant self-attestation</li> </ul>

# WIOA Title I Adult, Dislocated Worker, and the Wagner-Peyser Employment Service as amended by Title III Eligibility Source Documentation Guide

	<p>individual's specific needs will be met through accommodations, modifications and other services.</p>	
<p>Migrant and Seasonal Farmworker (MSFW) Designation</p>	<p>Determine if an individual is a Seasonal Farmworker or a Migrant Farmworker.</p> <p>A <b>Seasonal Farmworker</b> is an individual who is employed, or was employed in the past 12 months, in farm work of a seasonal or other temporary nature and is not required to be absent overnight from his/her permanent place of residence. Non-migrant individuals who are full-time students are excluded. Labor is performed on a seasonal basis where ordinarily, the employment pertains to, or is of the kind exclusively performed at certain seasons, or periods of the year and which, from its nature, may not be continuous or carried on throughout the year. A worker, who moves from one seasonal activity to another, while employed in farm work, is employed on a seasonal basis even though he/she may continue to be employed during a major portion of the year. A worker is employed on other temporary basis where he/she is employed for a limited time only or his/her performance is contemplated for a particular piece of work, usually of short duration. Generally, employment which is contemplated to continue indefinitely is not temporary.</p> <p>A <b>Migrant Farmworker</b> is a seasonal farmworker (as defined above) who travels to the job site so that the farmworker is not reasonably able to return to his/her permanent residence within the same day. Full-time students traveling in organized groups rather than with their families are excluded.</p>	<p><b>SUPPORTING</b></p> <p><b><u>Basic Demographic Characteristic Requirement</u></b></p> <ul style="list-style-type: none"> <li>• Participant self-attestation</li> </ul> <p><b><u>Career Service &amp; Training Service Requirement</u></b></p> <ul style="list-style-type: none"> <li>• Detailed Program Note</li> </ul>

# WIOA Title I Adult, Dislocated Worker, and the Wagner-Peyser Employment Service as amended by Title III Eligibility Source Documentation Guide

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

<p>Employment Status at Program Entry (WIOA)</p>	<p>Employment Status at Program entry is:</p> <ul style="list-style-type: none"> <li>• <b>Employed:</b> an individual currently working as a paid employee, performing any work at all in his or her own business, profession, or farm, performing any work as an unpaid worker in an enterprise operated by a member of the family or, one who is not working, but currently has a job or business from which he or she is temporarily absent because of illness, bad weather, vacation, labor-management dispute, or personal reasons, whether or not paid by the employer for time-off, and whether or not seeking another job.</li> <li>• <b>Employed, but Received Notice of Termination of Employment or Military Separation:</b> an individual who although employed either has received a notice of termination of employment or the employer has issued a Worker Adjustment and Retraining Notification (WARN) or other notice that the facility or enterprise will close, or is a transitioning service member (i.e., within 12 months of separation or 24 months of retirement).</li> <li>• <b>Not in Labor Force:</b> an individual is not in the labor force (not employed and are not actively looking for work, including those who are incarcerated).</li> <li>• <b>Not Employed/Unemployed:</b> an individual who is not employed but is seeking employment, makes specific effort to find a job, and is available for work.</li> </ul>	<p><b>SUPPORTING</b></p> <p><b><u>Basic Demographic Characteristic Requirement</u></b></p> <ul style="list-style-type: none"> <li>• Participant self-attestation</li> </ul> <p><b><u>Career Service &amp; Training Service Requirement</u></b></p> <ul style="list-style-type: none"> <li>• Pay Stubs</li> <li>• Detailed Program Note</li> </ul>
<p>Long-Term Unemployed at Program Entry (WIOA)</p>	<p>An individual, at program entry, who has been unemployed for 27 or more consecutive weeks.</p>	<p><b>SUPPORTING</b></p> <p><b><u>Basic Demographic Characteristic Requirement</u></b></p> <ul style="list-style-type: none"> <li>• Participant self-attestation</li> </ul> <p><b><u>Career Service &amp; Training Service Requirement</u></b></p> <ul style="list-style-type: none"> <li>• Pay Stubs</li> <li>• Detailed Program Note</li> </ul>

# WIOA Title I Adult, Dislocated Worker, and the Wagner-Peyser Employment Service as amended by Title III Eligibility Source Documentation Guide

<p>Underemployed Worker</p>	<p>An individual, at program entry, is an underplayed worker if they are not currently connected to a full-time job commensurate with the individual's level of education, skills, or wage and/or salary earned previously, or who have obtained only episodic, short-term, or part-time employment.</p>	<p><b>SUPPORTING</b></p> <p><b><u>Basic Demographic Characteristic Requirement</u></b></p> <ul style="list-style-type: none"> <li>• Participant self-attestation</li> </ul> <p><b><u>Career Service &amp; Training Service Requirement</u></b></p> <ul style="list-style-type: none"> <li>• Pay Stubs</li> <li>• Detailed Program Note</li> </ul>
<p>Low Income Status at Program Entry (WIOA)</p>	<p>Priority of service must be given to individuals who meet one of the following qualifying criteria for low income</p> <p>An individual who –</p> <ol style="list-style-type: none"> <li>a) receives, or in the 6 months prior to application to the program has received, or is a member of a family that is receiving or in the past 6 months prior to application to the program has received assistance through the Supplemental Nutrition Assistance Program (SNAP);</li> <li>b) receives, or in the 6 months prior to application to the program has received, or is a member of a family that is receiving or in the past 6 months prior to application to the program has received assistance through the Temporary Assistance for Needy Families (TANF) program;</li> <li>c) receives, or in the 6 months prior to application to the program has received, or is a member of a family that is receiving or in the past 6 months prior to application to the program has received assistance through the Supplemental Security Income (SSI) program;</li> <li>d) receives or in the past 6 months prior to application to the program has received, or is a member of a family that is receiving or in the past 6 months prior to application to the program has received cash payments under the a federal, state, or local income based public assistance program;</li> <li>e) received an income, or is a member of a family that received a total family income for the 6-month period prior to application</li> </ol>	<p><b>SUPPORTING</b></p> <p><b><u>Basic Demographic Characteristic &amp; Basic Career Service Requirement</u></b></p> <ul style="list-style-type: none"> <li>• Participant self-attestation</li> <li>• Detailed Program Note</li> </ul> <p><b><u>Individual Career Service &amp; Training Service Requirement</u></b></p> <ul style="list-style-type: none"> <li>• Supplemental Nutrition Assistance Program (SNAP) Verification</li> <li>• Temporary Assistance for Needy Families (TANF) Verification</li> <li>• Social Security Benefits (SSI) Verification</li> <li>• Social Security Disability Insurance (SSDI)</li> <li>• Public Assistance Verification</li> <li>• Housing Authority Verification</li> <li>• Alimony Agreement</li> <li>• Bank Statements</li> <li>• Compensation Award Letter</li> <li>• Employer Statement</li> <li>• Family or Business Financial Records</li> <li>• Pay Stub</li> <li>• Pension Statement</li> <li>• Quarterly Estimated Tax for Self-Employed Person</li> <li>• Current Unemployment Insurance Verification</li> <li>• Verification of Free or Reduced Price Lunch</li> </ul>

# WIOA Title I Adult, Dislocated Worker, and the Wagner-Peyser Employment Service as amended by Title III Eligibility Source Documentation Guide

	<p>for the program that does not exceed the higher of the poverty line or 70% of the lower living standard income level;</p> <p>f) is a foster child on behalf of whom State or local government payments are made;</p> <p>g) is an individual with a disability and whose own income does not exceed the poverty line but who is a member of a family whose income does not meet this requirement;</p> <p>h) is a homeless participant or a homeless child or youth or runaway youth; or</p> <p>i) Is an Individual who receives, or is eligible to receive a free or reduced price lunch.</p>	<ul style="list-style-type: none"> <li>• Applicant Statement, Attachment K – only allowable if no other forms of documentation are available.</li> </ul>
<p>Public Assistance Information</p>	<p>If the participant is receiving or has received cash assistance or other support services from any of the following agencies in the prior 6 months, the documentation must support the applicable agency. If the participant is receiving individual career services or training services, documentation is required from at least one agency the participant is receiving public assistance from.</p> <p>Temporary Assistance to Needy Families (TANF) (TAA Program Requirements)</p> <p>Supplemental Security Income (SSI)</p> <p>Social Security Disability Insurance (SSDI)</p> <p>Supplemental Nutrition Assistance Program (SNAP)</p> <p>Other Public Assistance Recipient:</p> <ul style="list-style-type: none"> <li>• General Assistance (State/local government),</li> <li>• Refugee Cash Assistance (RCA)</li> </ul>	<p><b>SUPPORTING</b></p> <p><b><u>Basic Demographic Characteristic &amp; Basic Career Service Requirement</u></b></p> <ul style="list-style-type: none"> <li>• Participant self-attestation</li> <li>• Detailed Program Note</li> </ul> <p><b><u>Individual Career Service &amp; Training Service Requirement</u></b></p> <ul style="list-style-type: none"> <li>• TANF Verification</li> <li>• SSI Verification</li> <li>• SSDI Verification</li> <li>• SNAP Verification</li> <li>• General (State/Local Government) Public Assistance Verification</li> <li>• Refugee Assistance Verification</li> <li>• Copy of Public Assistance Check</li> <li>• Copy of Authorization to Receive Cash Public Assistance</li> <li>• Medical card showing cash grant status</li> </ul>

# WIOA Title I Adult, Dislocated Worker, and the Wagner-Peyser Employment Service as amended by Title III Eligibility Source Documentation Guide

<p>Basic Skills Deficient/Low Levels of Literacy at Program Entry</p>	<p>An individual who is: That is unable to compute or solve problems, or read, write, or speak English, at a level necessary to function on the job, in the individual's family, or in society.</p> <p>*Grade level scores below 9.0 (i.e. 8.9) should be considered a "at or below the 8th grade level.</p>	<p><b>SUPPORTING</b></p> <p><b><u>Basic Demographic Characteristic Requirement</u></b></p> <ul style="list-style-type: none"> <li>• Participant self-attestation</li> </ul> <p><b><u>Career Service, &amp; Training Service Requirement</u></b></p> <ul style="list-style-type: none"> <li>• Standardized Assessment Test</li> <li>• School Records: documenting testing within the previous 6-month period prior to enrollment that includes actual scores from a generally accepted standardized test listed in current federal policy.</li> <li>• School issued IEP provided it states the student meets the definition of basic skills deficient. Document must be dated within the previous 6-month period prior to enrollment.</li> </ul> <p><b>REQUIRED:</b> Assessment test results must be entered in the Testing section of the applicable enrollment details in OKJobMatch.</p>
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# WIOA Title I Adult, Dislocated Worker, and the Wagner-Peyser Employment Service as amended by Title III Eligibility Source Documentation Guide

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

<p>Ex-Offender Status at Program Entry (WIOA)</p>	<p>An Individual at program entry who either:</p> <ol style="list-style-type: none"> <li>1. Has been subject to any stage of the criminal justice process for committing a status offense or delinquent act, or</li> <li>2. Requires assistance in overcoming barriers to employment resulting from a record of arrest or conviction.</li> </ol>	<p><b>SUPPORTING</b></p> <p><b><u>Basic Demographic Characteristic Requirement</u></b></p> <ul style="list-style-type: none"> <li>• Participant self-attestation</li> </ul> <p><b><u>Career Service &amp; Training Service Requirement</u></b></p> <ul style="list-style-type: none"> <li>• Documents from the Juvenile/Criminal Justice System</li> <li>• Court Documents</li> <li>• Letter of Parole</li> <li>• Letter from Probation Officer</li> <li>• Police Records</li> <li>• Detailed Case Notes of phone call with court or probation representatives</li> </ul>
<p>Other Significant Barrier to Employment</p>	<p>Identify if the individual has a significant barrier to employment not captured elsewhere.</p>	<p><b>SUPPORTING</b></p> <p><b><u>Basic Demographic Characteristic Requirement</u></b></p> <ul style="list-style-type: none"> <li>• Participant self-attestation</li> <li>• Detailed Case Note</li> </ul>
<p>Exhausting TANF Within 2 Years (Part A Title IV of the Social Security Act) at Program Entry (WIOA)</p>	<p>An individual, at program entry, is within 2 years of exhausting lifetime eligibility under part A of Title IV of the Social Security Act (42 U.S.C. 601 et seq.), regardless of whether they are receiving these benefits at program entry.</p>	<p><b>SUPPORTING</b></p> <p><b><u>Basic Demographic Characteristic Requirement</u></b></p> <ul style="list-style-type: none"> <li>• Participant self-attestation</li> </ul> <p><b><u>Career Service &amp; Training Service Requirement</u></b></p> <ul style="list-style-type: none"> <li>• TANF Verification</li> </ul>

# WIOA Title I Adult, Dislocated Worker, and the Wagner-Peyser Employment Service as amended by Title III Eligibility Source Documentation Guide

<p>Foster Care Status at Program Entry (WIOA)</p>	<p>An individual, age 24 or younger:</p> <ul style="list-style-type: none"> <li>(a) In foster care; or</li> <li>(b) Who has aged out of the foster care system; or</li> <li>(c) Who has attained 16 years of age and left foster care for kinship guardianship or adoption;</li> <li>(d) A child eligible for assistance under sec. 477 of the Social Security Act (42 U.S.C. 677); or</li> <li>(e) In an out-of-home placement.</li> </ul>	<p><b>SUPPORTING</b></p> <p><b><u>Basic Demographic Characteristic Requirement</u></b></p> <ul style="list-style-type: none"> <li>• Participant self-attestation</li> </ul> <p><b><u>Career Service &amp; Training Service Requirement</u></b></p> <ul style="list-style-type: none"> <li>• Social Service Verification</li> <li>• Court Documentation</li> <li>• Written Statement from State or Local Agency</li> <li>• Detailed Case Notes</li> </ul>

## WIOA Title I Adult, Dislocated Worker, and the Wagner-Peyser Employment Service as amended by Title III Eligibility Source Documentation Guide

Data Element	Definitions and Requirements	Acceptable Source Document
<p>Date of Program Entry (WIOA)</p>	<p>The date on which an individual became a participant after satisfying applicable programmatic requirements for the provision of services.</p> <p>For WIOA Title I Adult, Dislocated Worker, and Title III Employment Services programs, a participant is a reportable individual who has satisfied all applicable program requirements such as eligibility determination and who has received a service(s) other than a self-service or information only service or activity. For a list of services that establish participation, reference the Core Performance Measures OWDI.</p> <p>For Title I Youth, a participant is a reportable individual who has satisfied all applicable program requirements for the provision of services, including eligibility determination, an objective assessment, and development of an individual service strategy, and received one or more of the 14 WIOA Youth program elements.</p> <p>The date of program entry is the actual start date of the first qualifying service.</p>	<p><b>Required</b></p> <ul style="list-style-type: none"> <li>• Service and Training Plan entry</li> </ul>
<p>Date of First Basic Career Service</p>	<p>The date on which an individual received the first basic career service that is not provided via self-service or information-only services and activities.</p> <p>For a list of Basic Career Services, reference the Services list in the Core Performance Measures OWDI.</p> <p>The date of the first Basic Career Service is the actual start date of the first applicable service.</p>	<p><b>Required</b></p> <ul style="list-style-type: none"> <li>• Service and Training Plan entry</li> </ul>

# WIOA Title I Adult, Dislocated Worker, and the Wagner-Peyser Employment Service as amended by Title III Eligibility Source Documentation Guide

<p>Date of First Individualized Career Service</p>	<p>The date on which the participant received the first individualized career services on or after the date of participation. For a list of Individualized Career Services, reference the Services list in the Core Performance Measures OWDI.</p> <p>The date of the first Individualized Career Service is the actual start date of the first applicable service.</p>	<p><b>Required</b></p> <ul style="list-style-type: none"> <li>• Service and Training Plan entry</li> </ul>
<p>Date Individual Employment Plan Created</p>	<p>The date on which the participant’s Individual Employment Plan (IEP) was created or established to identify the participant’s employment goals, their appropriate achievement objectives, and the appropriate combination of services to achieve the employment goals.</p> <p>At a minimum, an IEP must include a comprehensive assessment, an employment goal, documentation of identified needs and barriers, and a signed Client Involvement Statement. Additional goals and services necessary for the attainment and retention of successful employment must be added to the IEP as they are identified.</p>	<p><b>Required</b></p> <ul style="list-style-type: none"> <li>• Individual Employment Plan in applicable Program enrollment</li> <li>• Service and Training Plan entry</li> <li>• Locally developed IEP</li> <li>• Client Involvement Statement – Attachment B or Virtual IEP Client Involvement Statement</li> <li>• Comprehensive Assessment Documentation</li> </ul> <p>The virtual IEP available in OKJobMatch may be utilized in the applicable program enrollment or a locally developed form may be used. All documentation related to the IEP must be easily accessible for monitoring purposes and all uploaded documentation must be clearly labeled in OKJobMatch.</p>
<p>Individual Training Account (ITA)</p>	<p>Individual Training Accounts (ITA) are the primary method to be used for procuring training services. Training services must be provided in a manner that maximized the individual's choice in the selection of a training provider.</p> <p>Staff must ensure that the Individual Training Account is completed in coordination with the participant utilizing the ITA agreement, ITA voucher, and Coordination of Training Fund (CoTF) forms.</p> <p>ITA’s may be utilized for OSY, ages 16-24 using WIOA youth funds when appropriate and they must utilize the Eligible Training Provider List (ETPL). ISY ages 18 or older may access ITAs through the Adult program.</p>	<p><b>Required</b></p> <ul style="list-style-type: none"> <li>• ITA Agreement – Attachment C</li> <li>• ITA Voucher – Attachment D</li> <li>• CoTF - Attachment E</li> <li>• LWDB required Documentation</li> <li>• The ITA issuance, issuance date, ITA amount, any grant or financial aid such as Pell grant, Federal grant, State aid, Institutional aid, or Employer-Funded financial aid, must be documented in the Educational Grants section of OKJobMatch in the applicable program Enrollment.</li> </ul>

## WIOA Title I Adult, Dislocated Worker, and the Wagner-Peyser Employment Service as amended by Title III Eligibility Source Documentation Guide

Pell Grant Recipient	Record if the participant is or has been notified that they will be receiving a Pell Grant at any time during participation in the program. This information may be updated at any time during participation in the program.	<b>Required</b> <ul style="list-style-type: none"> <li>• Educational Grants in applicable Program enrollment</li> </ul>
Training Contracts	In certain circumstances a contract for training services may be developed instead of an ITA. Reference State guidance for the list of applicable circumstances for using training contracts.	<b>Required</b> <ul style="list-style-type: none"> <li>• Training Contract</li> <li>• LWDB required Documentation</li> </ul>
Enrolled in Secondary Education Program (WIOA)	<p>If a participant is enrolled in a Secondary Education Program at or above the 9th Grade level.</p> <p>A Secondary Education Program includes both secondary school and enrollment in a program of study with instruction designed to lead to a high school equivalent credential. Examples may include adult high school credit programs and programs designed to prepare participants to pass recognized high school equivalency exams such as the GED, HiSet, or TASC.</p> <p>Programs of study designed to teach English proficiency skills or literacy skills below the 9th grade equivalent are not considered Secondary Education Programs.</p> <p>States may use this if the participant was either already enrolled in education or training at the time of application to the program or became enrolled in an education or training program at or above the 9th Grade level at any point while participating in the program.</p>	
Most Recent Date Received Supportive Services	Supportive services include, but are not limited to, assistance with transportation, child care, dependent care, and housing that are necessary to enable the participant to participate in programs which provide career and training services.	<b>Required</b> <ul style="list-style-type: none"> <li>• Service and Training Plan entry – Supportive Service</li> <li>• Supportive Service Request/Voucher</li> <li>• Verification that No Other Sources Are Available</li> <li>• LWDB required documentation</li> </ul>

## WIOA Title I Adult, Dislocated Worker, and the Wagner-Peyser Employment Service as amended by Title III Eligibility Source Documentation Guide

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

## WIOA Title I Adult, Dislocated Worker, and the Wagner-Peyser Employment Service as amended by Title III Eligibility Source Documentation Guide

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

## WIOA Title I Adult, Dislocated Worker, and the Wagner-Peyser Employment Service as amended by Title III Eligibility Source Documentation Guide

<p>Most Recent Date Received Work Experience Opportunities</p>	<p>Work experience opportunities that have academic and occupational education as a component. Work experiences are a planned, structured learning experience that takes place in a workplace for a limited period of time. Work experiences include:</p> <ul style="list-style-type: none"> <li>(a) Summer employment opportunities</li> <li>(b) Employment opportunities throughout the school year</li> <li>(c) Pre-apprenticeship programs</li> <li>(d) Internships</li> <li>(e) Job shadowing</li> <li>(f) On-the-job training</li> </ul>	<p><b>Required</b></p> <ul style="list-style-type: none"> <li>• Applicable Service and Training Plan entry: <ul style="list-style-type: none"> <li>○ Work Experience</li> <li>○ Internships/Employment Opportunities</li> <li>○ Job Shadowing</li> <li>○ On-the-Job Training</li> <li>○ Summer Employment/Internships</li> <li>○ Pre-apprenticeship Program</li> </ul> </li> </ul>
<p>Most Recent Date Received Follow-up Services</p>	<p>Follow-up services should be entered at the time the service is provided and the service date must always reflect the actual date of service. Only actual services delivered to the participant should be entered into the S&amp;T plan as a follow-up service.</p> <p>*Attempted contact with the participant, contact made for data/documentation collection, or contact for case management purposes are not acceptable follow-up services.</p>	<p><b>Required</b></p> <ul style="list-style-type: none"> <li>• Service and Training Plan entry – Follow-up Services</li> </ul>
<p>Date Enrolled in Post Exit Education or Training Program Leading to a Recognized Postsecondary Credential</p>	<p>This service should be entered for the Participants who have attended secondary education and obtained a secondary school diploma or its equivalency during program participation and have entered an education or training program that leads to a recognized postsecondary credential after program exit.</p> <p>This data element applies to the Credential Rate indicator.</p>	<p><b>Required</b></p> <p>Service and Training Plan entry AFTER exit– Post-Exit Education/Training Leading to Post Secondary Credential</p>
<p>Date of Program Exit (WIOA)</p>	<p>The date of program exit is the last date the participant received services (excluding self-service, information-only service or activities, or follow-up services) for at least 90 days, and no future services are planned.</p> <p>The date of program exit is the actual end date of the last qualifying service.</p>	<p><b>Required</b></p> <ul style="list-style-type: none"> <li>• Service and Training Plan entry</li> </ul>



# WIOA Title I Adult, Dislocated Worker, and the Wagner-Peyser Employment Service as amended by Title III Eligibility Source Documentation Guide

<p>Other Reasons for Exit (WIOA)</p>	<p>If the Participant exits the program and is unable to continue to receive program services due to any of the following reasons:</p> <ul style="list-style-type: none"> <li>• The participant has become incarcerated in a correctional institution or has become a resident of an institution or facility providing 24-hour support such as a hospital or treatment center during the course of receiving services as a participant.</li> <li>• The participant must undergo medical treatment and that treatment is expected to last longer than 90 days and precludes entry into unsubsidized employment or continued participation in the program.</li> <li>• The participant is deceased.</li> <li>• The participant is a member of the national Guard or other reserve military unit of the armed forces and is called to active duty for at least 90 days.</li> <li>• The participant is a criminal offender in a correctional institution under section 225 of WIOA</li> </ul>	<p><b>SUPPORTING</b></p> <ul style="list-style-type: none"> <li>• Detailed Program note</li> <li>• Court Documents</li> <li>• Physician’s Statement</li> <li>• Institution or facility Documentation</li> <li>• Death Certificate</li> <li>• Social Service Verification</li> <li>• Military Orders</li> <li>• Written Statement from State or Local Agency</li> </ul> <p><b>REQUIRED:</b> Staff must enter the reason for Exit in the applicable Program Exit Questions section of OKJobMatch and provide detailed program note.</p>
<p>Supplemental Wages</p>	<p>Supplemental wage information must be collected quarterly after exit, for the previous quarter, be reported in the participant’s applicable program enrollment in OKJobMatch under the program details wages section, and have support documentation uploaded. Information that must be included on source documentation:</p> <ul style="list-style-type: none"> <li>• Quarter for which data is being collected</li> <li>• O*NET code</li> <li>• NAICS Code</li> <li>• Employer FEIN</li> <li>• Employer</li> <li>• Company City</li> <li>• Company State</li> <li>• Total Earnings for Quarter</li> </ul>	<p><b>SUPPORTING</b></p> <ul style="list-style-type: none"> <li>• Tax documents</li> <li>• Payroll records</li> <li>• Employer records</li> <li>• WIOA Participant Supplemental Wage Quarterly Exit Data Collection Form, Attachment L</li> <li>• WIOA Partner’s administrative records containing required employment and wage information</li> <li>• Self-Employment Worksheet, Attachment M</li> </ul> <p><b>REQUIRED:</b> Staff must enter the reason for Exit in the applicable Program Exit Questions section of OKJobMatch and provide detailed program note.</p>

# WIOA Title I Adult, Dislocated Worker, and the Wagner-Peyser Employment Service as amended by Title III Eligibility Source Documentation Guide

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

Data Element	Definitions and Requirements	Acceptable Source Document
Date Enrolled in Post Exit Education or Training Program Leading to a Recognized Postsecondary Credential (WIOA)	<p>Record the date the participant is enrolled in an education or training program that leads to a recognized postsecondary credential after program exit. Leave blank if this data element does not apply to the participant.</p> <p>NOTE: This element only applies to participants who exited secondary education and obtained a secondary school diploma or its equivalency per Sec. 116(b)(2)(A)(iii). This data element applies to the Credential Rate indicator.</p>	<p><b>Required</b></p> <ul style="list-style-type: none"> <li>• Service &amp; Training Plan               <ul style="list-style-type: none"> <li>○ Post-Exit Education/Training Leading to Credential</li> </ul> </li> </ul>
Type of Employment Quarter After Exit Quarter (WIOA)	<p>Identify the type of employment status following exit:</p> <ol style="list-style-type: none"> <li>a) Unsubsidized Employment</li> <li>b) Subsidized Employment</li> <li>c) Registered Apprenticeship</li> <li>d) Military</li> <li>e) Not employed</li> </ol> <p><b>Requirement</b> Staff must enter the reason for Exit in the applicable Program Exit Question section of OKJobMatch.</p>	<p><b>SUPPORTING</b></p> <ul style="list-style-type: none"> <li>• Completion of Exit Questions in applicable program enrollment</li> <li>• Supplemental Data</li> </ul> <p><b>REQUIRED:</b> Staff must enter the reason for Exit in the applicable Program Exit Question section of OKJobMatch.</p>
Employment Related to Training (2nd Quarter After Exit) (WIOA)	<p>Record if the participant received training services and obtained employment directly related to the training services they received.</p>	<p><b>SUPPORTING</b></p> <ul style="list-style-type: none"> <li>• Completion of Exit Questions in applicable program enrollment</li> <li>• Supplemental Data</li> </ul> <p><b>REQUIRED:</b> Staff must enter the reason for Exit in the applicable Program Exit Question section of OKJobMatch.</p>

# WIOA Title I Adult, Dislocated Worker, and the Wagner-Peyser Employment Service as amended by Title III Eligibility Source Documentation Guide

<p>Entered Non-Traditional Employment</p>	<p>Non-traditional employment is when the participant’s employment is an occupation or field of work for which individuals of the participant’s gender comprise less than 25% of the individuals employed in such occupation or field of work. Non-traditional employment can be based on either local or national data, and both males and females can be in non-traditional employment. This information can be based on any job held after exit and only applies to adults, dislocated workers and youth who entered employment in the second quarter after the exit quarter.</p>	<p><b>SUPPORTING</b></p> <ul style="list-style-type: none"> <li>• Completion of Exit Questions in applicable program enrollment</li> <li>• Supplemental Data</li> </ul> <p><b>REQUIRED:</b> Staff must enter the reason for Exit in the applicable Program Exit Question section of OKJobMatch.</p>
<p>Documentation of Pre-Test and Post-Test Assessments</p>	<p>Documentation of Assessment:</p> <ol style="list-style-type: none"> <li>a) Category of Assessment             <ol style="list-style-type: none"> <li>i. Adult Basic Education (ABE); or</li> <li>ii. English-As-A-Second Language (ESL)</li> </ol> </li> <li>b) Date of Pre-assessment test</li> <li>c) Pre-Test Score:             <ol style="list-style-type: none"> <li>i. Raw scale score</li> </ol> </li> <li>d) Pre-Test Educational Functioning Level (EFL)             <ol style="list-style-type: none"> <li>i. Beginning ABE Literacy</li> <li>ii. Beginning Basic Education</li> <li>iii. Low Intermediate Basic Education</li> <li>iv. High Intermediate Basic Education</li> <li>v. Low Adult Secondary Education</li> <li>vi. High Adult Secondary Education</li> <li>vii. Beginning ESL Literacy</li> <li>viii. Low Beginning ESL</li> <li>ix. High Beginning ESL</li> <li>x. Low Intermediate ESL</li> <li>xi. High Intermediate ESL</li> <li>xii. Advanced ESL</li> </ol> </li> <li>e) Date of Post-Assessment Test</li> <li>f) Post-Test Score</li> <li>g) Post-Test Educational Functioning Level (EFL)</li> </ol>	<p><b>Required</b></p> <ul style="list-style-type: none"> <li>• Applicable Program Enrollment Testing Section             <ul style="list-style-type: none"> <li>○ Pre-Test Score</li> <li>○ Post-Test Score</li> </ul> </li> </ul> <p><b>SUPPORTING SOURCE DOCUMENTATION</b></p> <ul style="list-style-type: none"> <li>• Testing Scores</li> </ul> <p><b>REQUIRED:</b> Staff must ensure that participants Pre-test and Post-test scores are recorded in the Testing Section in the applicable Program Enrollment of OKJobMatch.</p>

## WIOA Title I Adult, Dislocated Worker, and the Wagner-Peyser Employment Service as amended by Title III Eligibility Source Documentation Guide

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

<p>Date of Most Recent Measurable Skill Gains (MSG): Educational Functioning Level (EFL) (WIOA)</p>	<p><b>Title I Adults &amp; Dislocated Workers:</b></p> <ul style="list-style-type: none"> <li>• All participants who are receiving instruction below the postsecondary education level and achieves at least one documented educational functioning level measurable skill gain.</li> </ul> <p>An educational functioning level measurable skill gain may be achieved and documented in one of three ways:</p> <ol style="list-style-type: none"> <li>1. Comparing a participant’s initial EFL as measured by a pre-test with the participant’s EFL as measured by a participant’s post-test; or</li> <li>2. For States that offer secondary school programs that lead to a secondary school diploma or its recognized equivalent, an EFL gain may be measured through the awarding of credits or Carnegie units; or</li> <li>3. States may report and EFL gain for participants who exit the program and enroll in postsecondary education or training during the program year.</li> </ol>	<p><b>Required</b></p> <ul style="list-style-type: none"> <li>• Service &amp; Training Plan             <ul style="list-style-type: none"> <li>○ Training that leads to a credential</li> </ul> </li> <li>• Measureable Skill Gain – Educational Functioning Level</li> <li>• Testing             <ul style="list-style-type: none"> <li>○ Pre-Test Score</li> <li>○ Post-Test Score</li> </ul> </li> </ul> <p><b>SUPPORTING SOURCE DOCUMENTATION</b></p> <ul style="list-style-type: none"> <li>• Testing Scores</li> </ul> <p>Staff must ensure that demographic information (school status and English language learner or basic skills deficient/low levels of literacy) is entered correctly during the eligibility process and that a program service that leads to a credential is entered into Service and Training Plan in the applicable program enrollment in OKJobMatch.</p> <p>Staff must ensure that participants Pre-test and Post-test scores are recorded in the Testing Section in applicable program enrollment of OKJobMatch.</p> <p>Staff must ensure that an Educational Functioning Level MSG is entered into the Measurable Skills Gain screen in the applicable program enrollment in OKJobMatch.</p>
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# WIOA Title I Adult, Dislocated Worker, and the Wagner-Peyser Employment Service as amended by Title III Eligibility Source Documentation Guide

<p>Date of Most Recent Measurable Skill Gains: Postsecondary Transcript/Report Card (WIOA)</p>	<p><b>Title I Adults &amp; Dislocated Workers:</b></p> <ul style="list-style-type: none"> <li>• All participants who are in an education or training program that leads to a recognized postsecondary credential or employment and achieves a documented postsecondary transcript/report card measurable skill gain.</li> </ul> <p>A postsecondary transcript/report card measurable skill gain may be achieved and documented by one of the following ways:</p> <ol style="list-style-type: none"> <li>1. The participant’s transcript or report card from a postsecondary education institution demonstrating a minimum of 12 hours per semester, that shows the participant is meeting Oklahoma’s academic standards, or</li> <li>2. For part time students, the participant’s transcript or report card from a postsecondary education institution demonstrating a total of at least 12 credit hours over the course of two completed semesters during the same 12-month period, that shows the participant is meeting Oklahoma’s academic standards.</li> </ol>	<p><b>Required</b></p> <ul style="list-style-type: none"> <li>• Service &amp; Training Plan             <ul style="list-style-type: none"> <li>○ Training that leads to a credential</li> </ul> </li> <li>• Measureable Skill Gain – Post-Secondary Transcript/Report Card</li> </ul> <p><b>SUPPORTING SOURCE DOCUMENTATION</b></p> <ul style="list-style-type: none"> <li>• Report Card (12 hours)</li> <li>• Transcript (12 hours)</li> </ul> <p>Staff must ensure that a program service that leads to a credential is entered into Service and Training Plan in the applicable program enrollment in OKJobMatch.</p> <p>Staff must ensure that a Post-Secondary Transcript/Report Card MSG is entered into the Measurable Skills Gain screen in the applicable program enrollment in OKJobMatch.</p>
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## WIOA Title I Adult, Dislocated Worker, and the Wagner-Peyser Employment Service as amended by Title III Eligibility Source Documentation Guide

<p>Date of Most Recent Measurable Skill Gains: Secondary Transcript/Report Card (WIOA)</p>	<p><b>Title I Adults &amp; Dislocated Workers:</b> All participants who are in an education or training program that leads to a recognized postsecondary credential or employment and achieves a documented secondary transcript/report card measurable skill gain.</p> <p>A secondary transcript/report card measurable skill gain may be achieved and documented by:</p> <ol style="list-style-type: none"> <li>1. The participant’s transcript or report card for secondary education for one semester showing that the participant is meeting Oklahoma’s academic standards.</li> </ol>	<p><b>Required</b></p> <ul style="list-style-type: none"> <li>• Service &amp; Training Plan             <ul style="list-style-type: none"> <li>○ Training that leads to a credential</li> </ul> </li> <li>• Measureable Skill Gain – Secondary Transcript/Report Card</li> </ul> <p><b>SUPPORTING SOURCE DOCUMENTATION</b></p> <ul style="list-style-type: none"> <li>• Report Card (semester)</li> <li>• Transcript (semester)</li> </ul> <p>Staff must ensure that a program service that leads to a credential is entered into Service and Training Plan in the applicable program enrollment in OKJobMatch.</p> <p>Staff must ensure that a Secondary Transcript/Report Card MSG is entered into the Measurable Skills Gain screen in the applicable program enrollment in OKJobMatch.</p>
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## WIOA Title I Adult, Dislocated Worker, and the Wagner-Peyser Employment Service as amended by Title III Eligibility Source Documentation Guide

<p>Date of Most Recent Measurable Skill Gains: Training Milestone (WIOA)</p>	<p><b>Title I Adults &amp; Dislocated Workers:</b> All participants who are in an education or training program that leads to a recognized postsecondary credential or employment and achieves a documented training milestone measurable skill gain.</p> <p>A training milestone measurable skill gain may be achieved and documented by:</p> <ol style="list-style-type: none"> <li>1. The documentation of a participant’s satisfactory or better progress towards established milestones from and employer/training provider who is providing training (e.g., completion of on-the-job training (OJT), completion of one year of a registered apprenticeship program, etc.).</li> </ol>	<p><b>Required</b></p> <ul style="list-style-type: none"> <li>• Service &amp; Training Plan <ul style="list-style-type: none"> <li>○ Training that leads to a credential</li> </ul> </li> <li>• Measureable Skill Gain – Training Milestone</li> </ul> <p><b>SUPPORTING SOURCE DOCUMENTATION</b></p> <ul style="list-style-type: none"> <li>• Training provider reports</li> <li>• Pay stubs (increase in pay must be from acquired skills or increased performance)</li> <li>• Employer progress report (substantive skill development)</li> <li>• OJT completion verification</li> <li>• Registered Apprenticeship completion verification</li> </ul> <p>Staff must ensure that a program service that leads to a credential is entered into Service and Training Plan in the applicable program enrollment in OKJobMatch.</p> <p>Staff must ensure that a Training Milestone MSG is entered into the Measurable Skills Gain screen in the applicable program enrollment in OKJobMatch.</p> <p>Source documentation must document newly acquired skills or increased performance as a result of the training received.</p>
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## WIOA Title I Adult, Dislocated Worker, and the Wagner-Peyser Employment Service as amended by Title III Eligibility Source Documentation Guide

<p>Date of Most Recent Measurable Skill Gains: Skills Progression (WIOA)</p>	<p><b>Title I Adults &amp; Dislocated Workers:</b> All participants who are in an education or training program that leads to a recognized postsecondary credential or employment and achieves a documented skills progression measurable skill gain.</p> <p>A skill progression measurable skill gain may be achieved and documented by:</p> <ol style="list-style-type: none"> <li>1. The documentation of a participant successfully completing an exam that is required for a particular occupation, or progress in attaining technical or occupational skills as evidenced by trade-related benchmarks such as knowledge-based exams.</li> </ol>	<p><b>Required</b></p> <ul style="list-style-type: none"> <li>• Service &amp; Training Plan <ul style="list-style-type: none"> <li>○ Training that leads to a credential</li> </ul> </li> <li>• Measureable Skill Gain – Exam Passage/Skills Progression</li> </ul> <p><b>SUPPORTING SOURCE DOCUMENTATION</b></p> <ul style="list-style-type: none"> <li>• Exam completion verification</li> </ul> <p>Staff must ensure that a program service that leads to a credential is entered into Service and Training Plan in the applicable program enrollment in OKJobMatch.</p> <p>Staff must ensure that a Skill Progression MSG is entered into the Measurable Skills Gain screen in the applicable program enrollment in OKJobMatch.</p>

## WIOA Title I Adult, Dislocated Worker, and the Wagner-Peyser Employment Service as amended by Title III Eligibility Source Documentation Guide

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

WIOA Title I Adult, Dislocated Worker, and the Wagner-Peyser Employment Service as amended  
by Title III Eligibility Source Documentation Guide

## Youth Eligibility Source Documentation Guide

Data Element	Definitions and Requirements	Acceptable Source Document
Age/Date of Birth (WIOA)	<p>WIOA Youth applicants must be between the ages of 14 to 24 at the time of program enrollment.</p>	<p><b>MATCH</b></p> <ul style="list-style-type: none"> <li>• Baptismal Record</li> <li>• Birth Certificate</li> <li>• DD-214 (Report of Transfer or Discharge Paper)</li> <li>• Driver’s License</li> <li>• Federal, State, or Local Government ID Card</li> <li>• Hospital Record of Birth</li> <li>• Passport</li> <li>• Public Assistance/Social Service Records</li> <li>• School Records or School ID (with date of birth)</li> <li>• Work Permit</li> <li>• Cross-match with Department of Vital Statistics</li> <li>• Tribal Records</li> <li>• Court Records</li> </ul>
Selective Service Registration	<p>All males who are at least 18 years of age and born after December 31, 1959, and who are not in the armed service on active duty, must be register with the Selective Service (SS).</p> <p>Males who cannot provide proof of SS Registration must be referred to the SS for registration.</p> <p>*Youth: if a youth is under 18 years of age at the time of enrollment into the WIOA Youth Program but turns 18 while still receiving WIOA funded service, the Case Manager must verify the youth has registered with Selective Service and document the registration per validation method and OKJobMatch requirements outlined in this policy.</p>	<p><b>MATCH</b></p> <ul style="list-style-type: none"> <li>• Selective Service Registration Card</li> <li>• Selective Service Status Information Letter</li> <li>• Selective Service Registration (Form 3A)</li> <li>• Selective Service Verification Form</li> <li>• Stamped Post Office Receipt of Registration</li> <li>• US Selective Service Verification (Internet) <a href="http://www.sss.gov">www.sss.gov</a></li> </ul>

## Youth Eligibility Source Documentation Guide

<p>Eligible to Work in the United States</p>	<p>The participant must be eligible to work in the United States at the time of program enrollment.</p> <p>Youth ages 16 and older must be eligible to work in the United States at the time of participation.</p>	<p><b>MATCH</b></p> <ul style="list-style-type: none"> <li>• Verification Documents from list A of Attachment J</li> <li>• Verification Documents from List B &amp; C of Attachment J</li> </ul>
<p>Eligible Veteran Status</p>	<p>An Individual who:</p> <ul style="list-style-type: none"> <li>• served in the active U.S. military, for a period of less than or equal to 180 days, and who was discharged or released from such service under conditions other than dishonorable, or</li> <li>• served on active duty for a period of more than 180 days and was discharged or released with other than a dishonorable discharge; or was discharged or released because of a service connected disability; or as a member of a reserve component under an order to active duty pursuant to section 167 (a), (d), or, (g), 673(a) of Title 10, U.S.C., served on active duty during a period of war or in a campaign or expedition for which a campaign badge is authorized and was discharged or released from such duty with other than a dishonorable discharge, or</li> <li>• is (a) the spouse of any person who dies on active duty or of a service connected disability, (b) the spouse of any member of the Armed Forces serving on active duty who at the time of application for assistance under this part, is listed, pursuant to 38 U.S.C 101 and the regulations issued there under, by the Secretary concerned, in one or more of the following categories and has been so listed more than 90 days:             <ul style="list-style-type: none"> <li>○ missing in action;</li> <li>○ captured in the line of duty by a hostile force;</li> </ul> </li> </ul>	<p><b>SUPPORTING</b></p> <ul style="list-style-type: none"> <li>• DD-214</li> <li>• Letter from the Veterans Administration</li> <li>• Cross-Match with Veterans Data</li> </ul> <p>*If a source document is not available at the time a service is provided a case note must be entered indicating that program service was provided in keeping with the Veterans Priority of Service Policy and that the documentation will be obtained when the veteran returns for additional services.</p>

## Youth Eligibility Source Documentation Guide

	<ul style="list-style-type: none"> <li>○ forcibly detained or interned in the line of duty by a foreign government or power; or</li> </ul> <p>(c) is the spouse of any person who has a total disability permanent in nature resulting from a service-connected disability or the spouse of a veteran who died while a disability so evaluated was in existence.</p>	
<p>Equal Opportunity Statement</p>	<p>Equal Opportunity Statement must be provided for each participant.</p> <p>The Equal Opportunity (EO) Statement is available on the Case Details page under Universal Information. Staff must review the EO Statement with the participant and provide a printed copy for signature. To print the EO Statement from the Universal information page: Click on Printable Version, choose EEO Notice, Print preview, and print. The participant and staff may then sign the form.</p>	<p><b>MATCH</b></p> <ul style="list-style-type: none"> <li>• Equal Opportunity Statement</li> </ul>
<p>Client Release</p>	<p>A Client Release is required for each participant.</p> <p>A participant may virtually sign the Online Client Release located in the Case Details page under Universal Information. You may also choose to utilize the printable Client Release for an actual signature.</p>	<p><b>MATCH</b></p> <ul style="list-style-type: none"> <li>• Client Release</li> </ul>

## Youth Eligibility Source Documentation Guide

### Required Basic Demographic Characteristics

All required basic demographic characteristics require the participant to self- attest in the applicable program enrollment snapshot prior to receiving any programmatic services.

Ethnicity: Hispanic/Latino	An individual indicates that he/she is a person of Cuban, Mexican, Puerto Rican, South or Central American, or other Spanish culture in origin, regardless of race.
Race	<p>Indicate which race the individual indicates:</p> <ul style="list-style-type: none"> <li>• American Indian or Alaska Native: a member of an Indian tribe, band, nation, or other organized group or community, including any Alaska Native village or regional or village corporation which is recognized as eligible for the special programs and services provided by the United States to Indians because of their status as Indians.</li> <li>• Asian or Asian American: any of the original peoples of the Far East, Southeast Asia, or the Indian Subcontinent (e.g., India, Pakistan, Bangladesh, Sri Lanka, Nepal, Sikkim, and Bhutan). This area includes, for example, Cambodia, China, Japan, Korea, Malaysia, Pakistan, the Philippine Islands, Thailand, and Vietnam.</li> <li>• Black or African American: any of the black racial groups of Africa</li> <li>• Native Hawaiian or Other Pacific Islander: any of the original peoples of Hawaii, Guam, Samoa, or other Pacific Islands.</li> <li>• White or Caucasian: any of the original peoples of Europe, the Middle East, or North Africa</li> </ul>
Single Parent at Program Entry (WIOA)	An individual who at program entry, is single, separated, divorced or a widowed individual who has primary responsibility for one or more dependent children under age 18 (including single pregnant women).
Family Size	<p>For documentation and income verification a “family” is defined as two or more persons related by blood, marriage, or decree of court, who are living in a single residence, and are included in one or more of the following categories:</p> <ul style="list-style-type: none"> <li>• A married couple and dependent children;</li> <li>• A parent or guardian and dependent children; or</li> <li>• A married couple</li> </ul> <p>OSY with a disability are not required to be low-income and for ISY with a disability, the youth’s own income, rather his or her family’s income, must meet the low-income definition and not exceed the higher of the poverty line or 70 percent of the LLSIL.</p>



## Youth Eligibility Source Documentation Guide

Individual with a Disability services	<p>Is the individual with a disability receiving services funded by a Local and/or State Agency by any of the following:</p> <ul style="list-style-type: none"> <li>• State Developmental Disabilities Agency (SDDA)</li> <li>• Local and State Mental Health Agency (LSMHA)</li> <li>• State Medicaid Home &amp; Community-Based Services (HCBS) waiver</li> </ul>
Individual With A Disability Work Setting	<p>Determine if the individual with a disability is participating in one of the following work settings:</p> <ul style="list-style-type: none"> <li>• Competitive Integrated Employment</li> <li>• Individual Supported Employment (e.g. use of job coach, with integrated placement at competitive wages)</li> <li>• Group Supported Employment (i.e., work crews, enclaves, etc.)</li> <li>• Sheltered Workshop (i.e., center- or facility-based employment)</li> <li>• Combination of two or more settings</li> </ul>
Individual With A Disability Type of Customized Employment Services Received	<p>Determine if the individual with a disability has received one of the following Customized Employment Services (CES):</p> <ul style="list-style-type: none"> <li>• Discovery assessment Services</li> <li>• Developed a Customized Employment Search Plan</li> <li>• Employer Negotiation Services</li> </ul> <p>Secured Employment as a result of Receiving Customized Employment Services and Received Extended Support Services</p>
Individual With A Disability Financial Capability	<p>Determine if the individual with a disability has received one of the following:</p> <ul style="list-style-type: none"> <li>• Benefit planning services</li> <li>• Financial Capability/Asset Development Services</li> <li>• Benefit Planning Services and Financial Capability/Asset Development Services</li> </ul>
Individual With a Disability Individualized Education Program Participant	<p>Determine if the individual with a disability has a Current or had a Previous Individualized Education Program / Special Education Services plan while attending Secondary School.</p> <p>An Individualized Education Program (IEP) is a plan used to ensure that students with disabilities are eligible to receive special education and related services under the Individuals with Disabilities Education Act and receive services tailored to meet their unique needs in the least restrictive environment to prepare them for further education, employment, and independent living (34 C.F.R. §300.340). To be eligible the student generally must be between ages 3 and 21, have a qualifying disability in one of the allowable categories that affects his or her educational performance, and be in need of special education and related services.</p>

## Youth Eligibility Source Documentation Guide

<p>Individual With a Disability Section 504 Plan</p>	<p>Determine if the individual with a disability has a Section 504 Plan</p> <p>Section 504, of the Rehabilitation Act, 29 U.S.C. § 794, is a federal law that protects students with disabilities that interfere with their ability to learn or access school programs from discrimination by schools receiving Federal financial assistance. Under Section 503 students are entitled to receive a free and appropriate education comparable to students without disabilities. A Section 504 Plan can be used to get reasonable accommodations for an individual with a disability that falls outside of the 13 disability categories required under Individuals with Disabilities Education Act (IDEA), or who does not need special education and related services. A Section 504 plan outlines how the individual’s specific needs will be met through accommodations, modifications and other services.</p>
<p>Highest School Grade Completed at Program Entry</p>	<p>Define the highest school grade completed by the participant at program entry</p> <p>Record the number of last school grade completed 1-12</p>
<p>Highest Educational Level Completed at Program Entry (WIOA)</p>	<p>Define the highest educational level completed by the individual at program entry:</p> <ul style="list-style-type: none"> <li>• High School Graduate</li> <li>• High School Certificate of Attendance/Completion: A participant with a disability receives a certificate as a result of successfully completing and Individualized Education Program (IEP)</li> <li>• Attained Certificate of Equivalency for a HS Diploma</li> <li>• 1 Yr College/FT Technical or Vocational School</li> <li>• 2 Yr College/FT Technical or Vocational School</li> <li>• Vocational/Technical Degree</li> <li>• Associate’s Degree</li> <li>• Bachelor’s Degree or Equivalent</li> <li>• Professional Degree</li> <li>• Education beyond the Bachelor’s Degree</li> <li>• Master’s Degree</li> <li>• Doctoral Degree</li> <li>• Occupational Skills License or Certification</li> </ul>
<p>Veteran Status</p>	<p>An individual who served on active duty in the armed forces and who was discharged or released from such service under conditions other than dishonorable.</p>

## Youth Eligibility Source Documentation Guide

Date of Actual Military Separation	The date on which the participant separated from active duty with the U.S. armed forces.
Transitioning Service Member	An individual who is on active military duty status (including separation leave) with the U.S. armed forces and within 24 months of retirement or 12 months of separation from the armed forces.
Homeless Veteran	<p>An individual who served in the active military, naval, or air service, and who was discharged or released from such service under conditions other than dishonorable, and who lacks a fixed, regular, and adequate night time residence. This definition includes any individual who has a primary night time residence that is a publicly or privately operated shelter for temporary accommodation; an institution providing temporary residence for participants intended to be institutionalized; or a public or private place not designated for or ordinarily used as a regular sleeping accommodation for human beings.</p> <p style="text-align: center;">*This definition does not include a participant imprisoned or detained under an Act of Congress or State law. A participant who may be sleeping in a temporary accommodation while away from home should not, as a result of that alone, be recorded as homeless.</p>
Homeless Veterans' Reintegration Program Participant	An individual who is a veteran who is enrolled in the Homeless Veterans' Reintegration Program (HVRP), Incarcerated Veterans Transition Program (IVTP), or Homeless Female Veterans and Veterans with Families (HFVWWF) Reintegration Program in their area.
Homeless Veterans' Reintegration Program Grantee	If the participant is a veteran who is enrolled in the Homeless Veterans' Reintegration Program (HVRP), Incarcerated Veterans Transition Program (IVTP), or Homeless Female Veterans and Veterans with Families (HFVWWF) Reintegration Program in their area record the first five numbers of the DOL Grant number for the corresponding program (Should be provided by the local grantee/serve provider making the referral)
Active Duty Military Spouse	If participant is the spouse of a member of the Armed Forces on active duty.

## Youth Eligibility Source Documentation Guide

<p>Disabled Veteran</p>	<p>An individual who is a veteran who served on active duty in the U.S. armed forces and who is entitled to compensation regardless of rating (including those rated at 0%); or who but for the receipt of military retirement pay would be entitled to compensation, under laws administered by the Department of Veterans Affairs (DVA); or was discharged or released from active duty because of a service-connected disability.</p> <p>OR</p> <p>An individual who is a veteran who served on active duty in the U.S. armed forces and who is entitled to compensation (or who, but for the receipt of military retirement pay would be entitled to compensation) under laws administered by the DVA for a disability, (i) rated at 30 percent or more or, (ii) rated at 10 or 20 percent in the case of a veteran who has been determined by DVA to have a serious employment handicap.</p>
<p>Migrant and Seasonal Farmworker (MSFW) Designation</p>	<p>Determine if an individual is a Seasonal Farmworker or a Migrant Farmworker.</p> <p>A <b>Seasonal Farmworker</b> is an individual who is employed, or was employed in the past 12 months, in farm work of a seasonal or other temporary nature and is not required to be absent overnight from his/her permanent place of residence. Non-migrant individuals who are full-time students are excluded. Labor is performed on a seasonal basis where ordinarily, the employment pertains to, or is of the kind exclusively performed at certain seasons, or periods of the year and which, from its nature, may not be continuous or carried on throughout the year. A worker, who moves from one seasonal activity to another, while employed in farm work, is employed on a seasonal basis even though he/she may continue to be employed during a major portion of the year. A worker is employed on other temporary basis where he/she is employed for a limited time only or his/her performance is contemplated for a particular piece of work, usually of short duration. Generally, employment which is contemplated to continue indefinitely is not temporary.</p> <p>A <b>Migrant Farmworker</b> is a seasonal farmworker (as defined above) who travels to the job site so that the farmworker is not reasonably able to return to his/her permanent residence within the same day. Full-time students traveling in organized groups rather than with their families are excluded.</p>

## Youth Eligibility Source Documentation Guide

<p>Eligible Migrant and Seasonal Farmworker Status (WIOA sec. 167)</p>	<p>Determine if an individual is a Seasonal Farmworker or a Migrant Farmworker at National Farmworker Jobs Program Entry.</p> <ul style="list-style-type: none"> <li>• <b>Seasonal Farmworker Adult:</b> is an individual at program entry who is a low-income individual who for the 12 consecutive month out of the 24 months prior to application for the program involved, has been primarily employed in agriculture or fish farming labor that is characterized by chronic unemployment or underemployment; and faces multiple barriers to economic self-sufficiency.</li> <li>• <b>Migrant Farmworker Adult:</b> is an individual at program entry is a seasonal farmworker and whose agricultural labor requires travel to a job site such that the farmworker is unable to return to a permanent place of residence within the same day.</li> <li>• <b>MSFW youth:</b> Is an individual who is a migrant farmworker or seasonal farmworker as defined above and is between the age of 14-24.</li> <li>• <b>Dependent Adult:</b> An individual who is an adult program participant and a dependent of the individual described as a seasonal or migrant seasonal farmworker above.</li> </ul> <p>Dependent Youth: An individual who is a youth program participant and a dependent of the individual described as a seasonal or migrant seasonal farmworker above.</p>
<p>Employment Status at Program Entry (WIOA)</p>	<p>Employment Status at Program entry is:</p> <ul style="list-style-type: none"> <li>• <b>Employed:</b> an individual currently working as a paid employee, performing any work at all in his or her own business, profession, or farm, performing any work as an unpaid worker in an enterprise operated by a member of the family or, one who is not working, but currently has a job or business from which he or she is temporarily absent because of illness, bad weather, vacation, labor-management dispute, or personal reasons, whether or not paid by the employer for time-off, and whether or not seeking another job.</li> <li>• <b>Employed, but Received Notice of Termination of Employment or Military Separation:</b> an individual who although employed either has received a notice of termination of employment or the employer has issued a Worker Adjustment and Retraining Notification (WARN) or other notice that the facility or enterprise will close, or is a transitioning service member (i.e., within 12 months of separation or 24 months of retirement).</li> <li>• <b>Not in Labor Force:</b> an individual is not in the labor force (not employed and are not actively looking for work, including those who are incarcerated).</li> <li>• <b>Not Employed/Unemployed:</b> an individual who is not employed but is seeking employment, makes specific effort to find a job, and is available for work.</li> </ul>

## Youth Eligibility Source Documentation Guide

<p>Long-Term Unemployed at Program Entry (WIOA)</p>	<p>An individual, at program entry, who has been unemployed for 27 or more consecutive weeks.</p>
<p>Underemployed Worker</p>	<p>An individual, at program entry, is an underplayed worker if they are not currently connected to a full-time job commensurate with the individual’s level of education, skills, or wage and/or salary earned previously, or who have obtained only episodic, short-term, or part-time employment.</p>
<p>Other Significant Barrier to Employment</p>	<p>Identify if the individual has a significant barrier to employment not captured elsewhere.</p>
<p>Exhausting TANF Within 2 Years (Part A Title IV of the Social Security Act) at Program Entry (WIOA)</p>	<p>An individual, at program entry, is within 2 years of exhausting lifetime eligibility under part A of Title IV of the Social Security Act (42 U.S.C. 601 et seq.), regardless of whether they are receiving these benefits at program entry.</p>
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# Youth Eligibility Source Documentation Guide

## YOUTH ELIGIBILITY CHARACTERISTICS REQUIRMENTS

If the characteristic is being used for eligibility verification, then the acceptable source document must be uploaded into OKJobMatch under the Uploaded Documentation section of the Youth’s Case Details Page. Some documentation may be source documents for more than one characteristic and need only to be uploaded one time provided all characteristics are indicated prior to the upload.

<p>School Status at Program Entry (WIOA)</p>	<p>School Status at Program Entry is:</p> <ul style="list-style-type: none"> <li>• <b>In-School, Secondary School or Less:</b> an individual who has not received a secondary school diploma or its recognized equivalent and is attending any primary or secondary school (including elementary, intermediate, junior high school, whether full or part-time), or is between school terms and intends to return to school.</li> <li>• <b>In-School, Alternative School:</b> an individual who has not received a secondary school diploma or its recognized equivalent and is attending an alternative high school or an alternative course of study approved by the local educational agency whether full or part-time, or is between school terms and is enrolled to return to school.</li> <li>• <b>In-School, Postsecondary School:</b> an individual who has received a secondary school diploma or its recognized equivalent and is attending a postsecondary school or program (whether full or part-time), or is between school terms and is enrolled to return to school.</li> <li>• <b>Not Attending School or Secondary School Dropout:</b> an individual who is not within the age of compulsory school attendance; and is no longer attending any school and has not received a secondary school diploma or its recognized equivalent.</li> </ul>	<p><b>SUPPORTING</b></p> <p><b><u>Basic Demographic Characteristic</u></b></p> <ul style="list-style-type: none"> <li>• Participant self-attestation</li> </ul> <p><b><u>Youth Eligibility Verification</u></b></p> <ul style="list-style-type: none"> <li>• Parent, Guardian, or other responsible adult attestation (*required for individuals under 18)</li> <li>• Secondary School Diploma or Recognized equivalent</li> <li>• Attendance Record</li> <li>• Transcripts</li> <li>• School Documentation</li> <li>• Dropout letter</li> <li>• School Dropout Status Form – Attachment H</li> </ul>
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## Youth Eligibility Source Documentation Guide

	<ul style="list-style-type: none"> <li>• <b>Not attending school; Secondary School Graduate or has a Recognized Equivalent:</b> an individual who is not attending any school and has either graduated from secondary school or has attained a secondary school equivalency.</li> <li>• <b>Not attending School: Within Age of Compulsory School Attendance:</b> an individual who is within the age of compulsory school attendance, but is not attending school and has not received a secondary school diploma or its recognized equivalent.</li> </ul>	
<p>Basic Skills Deficient/Low Levels of Literacy at Program Entry</p>	<p>An individual who is:</p> <ul style="list-style-type: none"> <li>• A Youth, that has English reading, writing, or computing skills at or below the 8th grade level on a generally accepted standardized test; or</li> <li>• A Youth or Adult, that is unable to compute or solve problems, or read, write, or speak English, at a level necessary to function on the job, in the individual’s family, or in society.</li> </ul> <p>*Grade level scores below 9.0 (i.e. 8.9) should be considered a "at or below the 8th grade level.</p> <p>Assessment test results must be entered in the Testing section of the applicable enrollment details in OKJobMatch.</p>	<p><b>SUPPORTING</b></p> <p><b><u>Basic Demographic Characteristic</u></b></p> <ul style="list-style-type: none"> <li>• Participant self-attestation</li> </ul> <p><b><u>Youth Eligibility Verification</u></b></p> <ul style="list-style-type: none"> <li>• Standardized Assessment Test</li> <li>• School Records: documenting testing within the previous 6-month period prior to enrollment that includes actual scores from a generally accepted standardized test listed in current federal policy.</li> <li>• School issued IEP provided it states the student meets the definition of basic skills deficient. Document must be dated within the previous 6-month period prior to enrollment.</li> </ul>



## Youth Eligibility Source Documentation Guide

<p>English Language Learner at Program Entry (WIOA)</p>	<p>An Individual at program entry who has limited ability in speaking, reading, writing or understanding the English language and also meets at least one of the following two conditions:</p> <ul style="list-style-type: none"> <li>• His or her native language is a language other than English, or</li> <li>• He or she lives in a family or community environment where a language other than English is the dominant language.</li> </ul> <p>*If the participant is an English language learner and answered <b>YES</b>: you <u>must</u> identify the Primary Language of the individual.</p>	<p><b>SUPPORTING</b></p> <p><b><u>Basic Demographic Characteristic</u></b></p> <ul style="list-style-type: none"> <li>• Participant self-attestation</li> </ul> <p><b><u>Youth Eligibility Verification</u></b></p> <ul style="list-style-type: none"> <li>• Detailed Program Note</li> <li>• School records</li> </ul> <p>*If the participant is an English language learner and answered <b>YES</b>: the Primary Language of the individual must be identified.</p>
<p>Ex-Offender Status at Program Entry (WIOA)</p>	<p>An Individual at program entry who either:</p> <ul style="list-style-type: none"> <li>• Has been subject to any stage of the criminal justice process for committing a status offense or delinquent act, or</li> <li>• Requires assistance in overcoming barriers to employment resulting from a record of arrest or conviction.</li> </ul> <p>*A status offense is the illegal behavior of a child (under the age of 18 years old), that if committed by an adult would not be considered a criminal activity, such as truancy, possession and/or consumption of alcohol, curfew violations, and purchase of cigarettes.</p>	<p><b>SUPPORTING</b></p> <p><b><u>Basic Demographic Characteristic</u></b></p> <ul style="list-style-type: none"> <li>• Participant self-attestation</li> </ul> <p><b><u>Youth Eligibility Verification</u></b></p> <ul style="list-style-type: none"> <li>• Documents from the Juvenile/Criminal Justice System</li> <li>• Court Documents</li> <li>• Letter of Parole</li> <li>• Letter from Probation Officer</li> <li>• Police Records</li> <li>• Detailed Case Notes of phone call with court or probation representatives</li> <li>• WIOA Youth Eligibility Form, Attachment F <b>AND</b> WIOA Youth Support Form, Attachment G</li> </ul>

## Youth Eligibility Source Documentation Guide

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

<p>Foster Care Youth Status at Program Entry (WIOA)</p>	<p>An individual, age 24 or younger:</p> <ul style="list-style-type: none"> <li>• In foster care; or</li> <li>• Who has aged out of the foster care system; or</li> <li>• Who has attained 16 years of age and left foster care for kinship guardianship or adoption;</li> <li>• A child eligible for assistance under sec. 477 of the Social Security Act (42 U.S.C. 677); or</li> <li>• In an out-of-home placement.</li> </ul>	<p><b>SUPPORTING</b></p> <p><b><u>Basic Demographic Characteristic</u></b></p> <ul style="list-style-type: none"> <li>• Participant self-attestation</li> </ul> <p><b><u>Youth Eligibility Verification</u></b></p> <ul style="list-style-type: none"> <li>• Social Service Verification</li> <li>• Court Documentation</li> <li>• Verification of Payments made on behalf of the Child</li> <li>• Written Statement from State or Local Agency</li> <li>• WIOA Youth Eligibility Form, Attachment F <b>AND</b> WIOA Youth Support Form, Attachment G</li> </ul>
<p>Pregnant or Parenting Youth</p>	<p>A Youth who is pregnant, or an individual (male or female) who is providing custodial care to one or more dependents under age 18.</p> <p>*Males do not qualify as a parenting youth until the child is born.</p>	<p><b>SUPPORTING</b></p> <p><b><u>Basic Demographic Characteristic</u></b></p> <ul style="list-style-type: none"> <li>• Participant self-attestation</li> </ul> <p><b><u>Youth Eligibility Verification</u></b></p> <ul style="list-style-type: none"> <li>• Child’s Birth Certificate</li> <li>• Baptismal Record</li> <li>• Physician’s Statement Confirming Pregnancy</li> <li>• Detailed Case Note with Observation of pregnancy status</li> <li>• Paternity Verification</li> <li>• Public Assistance Verification verifying child in Individual’s Case.</li> <li>• WIOA Youth Eligibility Form, Attachment F <b>AND</b> WIOA Youth Support Form, Attachment G</li> </ul>

## Youth Eligibility Source Documentation Guide

<p>Individual with a Disability (WIOA)</p>	<p>An individual may indicate that he/she has a disability as defined as a physical or mental impairment that substantially limits one or more of the person’s major life activities. Applicable categories are:</p> <ul style="list-style-type: none"> <li>• Physical/Chronic Health Conditions</li> <li>• Physical/Mobility Impairments</li> <li>• Mental or Psychiatric Disability</li> <li>• Vision-related Disability</li> <li>• Hearing-related Disability</li> <li>• Learning Disability</li> <li>• Cognitive/Intellectual Disability</li> <li>• Participant may choose not to disclose type of disability</li> </ul> <p><b><u>Youth Disability &amp; Low Income</u></b> A youth applicant whose family income exceeds the low-income limit may still qualify for participation in the WIOA program provided that the applicant is an individual with a disability as defined by the Americans with Disabilities Act and has an individual income that does not exceed the greater of the Poverty Line or 70% of the Lower Living Standard Income Level.</p>	<p><b>SUPPORTING</b></p> <p><b><u>Basic Demographic Characteristic</u></b></p> <ul style="list-style-type: none"> <li>• Participant self-attestation</li> </ul> <p><b><u>Youth Eligibility &amp; Low Income Requirement</u></b></p> <ul style="list-style-type: none"> <li>• WIOA Youth Eligibility Form, Attachment F <b>AND</b></li> <li>• WIOA Youth Support Form, Attachment G</li> </ul>
<p>Low Income Status at Program Entry (WIOA)</p>	<p>An individual who –</p> <ul style="list-style-type: none"> <li>• receives, or in the 6 months prior to application to the program has received, or is a member of a family that is receiving or in the past 6 months prior to application to the program has received assistance through the Supplemental Nutrition Assistance Program (SNAP);</li> <li>• receives, or in the 6 months prior to application to the program has received, or is a member of a family that is receiving or in the past 6 months prior to application to the program has received assistance through the Temporary Assistance for Needy Families (TANF) program;</li> </ul>	<p><b>SUPPORTING</b></p> <p><b><u>Basic Demographic Characteristic</u></b></p> <ul style="list-style-type: none"> <li>• Participant self-attestation</li> </ul> <p><b><u>Youth Eligibility Verification</u></b></p> <ul style="list-style-type: none"> <li>• WIOA Youth Support Form, Attachment G <b>AND</b></li> <li>• WIOA Income Eligibility Form: Attachment A, with supporting document(s) from list below to document the family’s INCLUDABLE income:</li> </ul>

## Youth Eligibility Source Documentation Guide

	<ul style="list-style-type: none"> <li>• receives, or in the 6 months prior to application to the program has received, or is a member of a family that is receiving or in the past 6 months prior to application to the program has received assistance through the Supplemental Security Income (SSI) program;</li> <li>• receives or in the past 6 months prior to application to the program has received, or is a member of a family that is receiving or in the past 6 months prior to application to the program has received cash payments under <del>the</del> a federal, state, or local income based public assistance program;</li> <li>• received an income, or is a member of a family that received a total family income for the 6-month period prior to application for the program that does not exceed the higher of the poverty line or 70% of the lower living standard income level;</li> <li>• is a foster child on behalf of whom State or local government payments are made;</li> <li>• is an individual with a disability and whose own income does not exceed the poverty line but who is a member of a family whose income does not meet this requirement;</li> <li>• is a homeless participant or a homeless child or youth or runaway youth;</li> <li>• Is an Individual who receives, or is eligible to receive a free or reduced price lunch; or</li> <li>• is a Youth living in a high-poverty area.</li> </ul>	<ul style="list-style-type: none"> <li>• Supplemental Nutrition Assistance Program (SNAP) Verification</li> <li>• Temporary Assistance for Needy Families (TANF) Verification</li> <li>• Social Security Benefits (SSI) Verification</li> <li>• Social Security Disability Insurance (SSDI)</li> <li>• Public Assistance Verification</li> <li>• Housing Authority Verification</li> <li>• Alimony Agreement</li> <li>• Bank Statements</li> <li>• Compensation Award Letter</li> <li>• Employer Statement</li> <li>• Family or Business Financial Records</li> <li>• Pay Stub</li> <li>• Pension Statement</li> <li>• Quarterly Estimated Tax for Self-Employed Person</li> <li>• Current Unemployment Insurance Verification</li> <li>• Verification of Free or Reduced Price Lunch</li> <li>• Verification of High-poverty Area             <ul style="list-style-type: none"> <li>○ Utility Bill (excluding cell phone bill)</li> <li>○ Lease/Rental Contract</li> <li>○ Mortgage Contract/Statement</li> <li>○ School Records</li> <li>○ Driver's license</li> <li>○ State Issued ID</li> <li>○ Pay Stub</li> </ul> </li> <li>• <b>AND</b> <ul style="list-style-type: none"> <li>○ Censes Track Verification</li> </ul> </li> <li>• Applicant Statement, Attachment K</li> </ul>
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## Youth Eligibility Source Documentation Guide

<p>Public Assistance Information</p>	<p>If the participant is receiving or has received cash assistance or other support services from any of the following agencies in the prior 6 months, the documentation must support the applicable agency. If the participant is receiving individual career services or training services, documentation is required from at least one agency the participant is receiving public assistance from.</p> <ul style="list-style-type: none"> <li>• Temporary Assistance to Needy Families (TANF)</li> <li>• Supplemental Security Income (SSI)</li> <li>• Social Security Disability Insurance (SSDI)</li> <li>• Supplemental Nutrition Assistance Program (SNAP)</li> <li>• Other Public Assistance Recipient:             <ul style="list-style-type: none"> <li>○ General Assistance (State/local government),</li> <li>○ Refugee Cash Assistance (RCA)</li> </ul> </li> </ul>	<p><b>SUPPORTING</b></p> <p><b><u>Basic Demographic Characteristics</u></b></p> <ul style="list-style-type: none"> <li>• Participant self-attestation</li> </ul> <p><b><u>Youth Eligibility Verification</u></b></p> <ul style="list-style-type: none"> <li>• TANF Verification</li> <li>• SSI Verification</li> <li>• SSDI Verification</li> <li>• SNAP Verification</li> <li>• General (State/Local Government) Public Assistance Verification</li> <li>• Refugee Assistance Verification</li> <li>• Copy of Public Assistance Check</li> <li>• Copy of Authorization to Receive Cash Public Assistance</li> <li>• Medical card showing cash grant status</li> </ul>
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## Youth Eligibility Source Documentation Guide

<p>Youth Who Needs Additional Assistance</p>	<p>A Youth who requires additional assistance to enter or complete an educational program, or to secure and hold employment. Defined by the State as a <b>low income</b> youth meeting at least one of the following criteria:</p> <ul style="list-style-type: none"> <li>• With a parent or legal guardian that is currently or previously incarcerated for a felony conviction;</li> <li>• With a parent or legal guardian who lacks a high school diploma or GED; or</li> <li>• Who attends or has attended chronically under performing schools listed as a Priority School/Targeted Intervention School on the State Department of Education website; or</li> <li>• ISY between 18-21 years of age with a pattern of poor work history; or OSY between 18-24 years of age with a pattern of Poor Work History. Poor work history includes non-reoccurring employment income or sporadic employment.</li> </ul> <p>*low-income includes a youth that lives in a high-poverty area.</p>	<p><b>SUPPORTING</b></p> <p><b><u>Basic Demographic Characteristic</u></b></p> <ul style="list-style-type: none"> <li>• Participant self-attestation</li> </ul> <p><b><u>Youth Eligibility Verification</u></b></p> <ul style="list-style-type: none"> <li>• Individual Service Strategy</li> <li>• School Records verifying Attendance at Targeted or Focus Designation School</li> <li>• Court Documentation</li> <li>• Detailed Case Notes documenting Parent or Guardian Status</li> </ul>
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## Youth Eligibility Source Documentation Guide

Data Element	Definitions and Requirements	Acceptable Source Document
<p>Date of Program Entry (WIOA)</p>	<p>The date on which an individual became a participant after satisfying applicable programmatic requirements for the provision of services.</p> <p>For WIOA Title I Adult, Dislocated Worker, and Title III Employment Services programs, a participant is a reportable individual who has satisfied all applicable program requirements such as eligibility determination and who has received a service(s) other than a self-service or information only service or activity. For a list of services that establish participation, reference the Core Performance Measures OWDI.</p> <p>For Title I Youth, a participant is a reportable individual who has satisfied all applicable program requirements for the provision of services, including eligibility determination, an objective assessment, and development of an individual service strategy, and received one or more of the 14 WIOA Youth program elements.</p> <p>The date of program entry is the actual start date of the first qualifying service.</p>	<p><b>Required</b></p> <ul style="list-style-type: none"> <li>• Service and Training Plan entry</li> </ul>
<p>Date of First WIOA Youth Service</p>	<p>The date on which the participant began receiving his/her first WIOA youth service (1 of the 14 youth program elements)</p>	<p><b>Required</b></p> <ul style="list-style-type: none"> <li>• Service and Training Plan entry</li> </ul>



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

## Youth Eligibility Source Documentation Guide

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

<p>Most Recent Date Received Supportive Services</p>	<p>Supportive services include, but are not limited to, assistance with transportation, child care, dependent care, and housing that are necessary to enable the participant to participate in programs which provide career and training services.</p> <p>Support services for <b>Youth</b> participants must be appropriate to the needs of the individual and defined in their individual Service Strategy which may include:</p> <ul style="list-style-type: none"> <li>• Linkages to community services</li> <li>• Assistance with transportation</li> <li>• Assistance with child care and dependent care</li> <li>• Assistance with housing</li> <li>• Needs-related payments</li> <li>• Assistance with educational testing</li> <li>• Reasonable accommodations for youth with disabilities</li> <li>• Legal aid services</li> <li>• Referrals to healthcare</li> <li>• Assistance with uniforms or other appropriate work attire and work-related tools, including such items as eye glasses and protective eye gear</li> <li>• Assistance with books, fees, school supplies, and other necessary items for students enrolled in postsecondary education classes; and</li> <li>• Payments and fees for employment and training-related applications, test, and certifications.</li> </ul>	<p><b>Required</b></p> <ul style="list-style-type: none"> <li>• Service and Training Plan entry – Supportive Service</li> <li>• Supportive Service Request/Voucher</li> <li>• Verification that No Other Sources Are Available</li> <li>• LWDB required documentation</li> </ul>
<p>Received Needs-Related Payments</p>	<p>Needs-related payments provided to a participant with financial assistance for the purpose of enabling them to participant in training services.</p> <p>A participant must be enrolled in a training program in order to receive needs-related payments.</p>	<p><b>Required</b></p> <ul style="list-style-type: none"> <li>• Training Service documented in the Program Service &amp; Training Plan</li> <li>• Voucher, Purchase Order, Invoice, &amp; Receipts</li> <li>• LWDB Required Documentation</li> </ul>

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<p>Type of Work Experience</p>	<p>WIOA identifies four categories of work experience:</p> <ul style="list-style-type: none"> <li>• Summer employment opportunities and other employment opportunities available throughout the school year;</li> <li>• Pre-apprenticeship programs;</li> <li>• Internships and job shadowing; and</li> <li>• On-the-job training (OJT) opportunities as defined in WIOA Section 3(44) and in 20 CFR § 680.700.</li> </ul> <p>The type of work experience is recorded as the type of service entered into the Service and Training Plan</p> <p>NOTE: If Internship/Employment Opportunities or On-The-Job Training are part of a Pre-Apprenticeship program, use the Pre-Apprenticeship Service.</p>	<p><b>Required</b></p> <ul style="list-style-type: none"> <li>• Service and Training Plan entry</li> <li>• Detailed Program note</li> <li>• State and Local policy documentation requirements</li> </ul>
<p>Date Entered Training (WIOA)</p>	<p>The date on which the participant’s training service actually began.</p> <p>The date entered training is recorded as the actual start date of the first applicable training service.</p>	<p><b>Required</b></p> <ul style="list-style-type: none"> <li>• Documentation of need for training</li> <li>• Service and Training Plan entry</li> <li>• Detailed Program note</li> </ul>
<p>Type of Training Service (WIOA)</p>	<p>The date on which the participant’s training service actually began.</p> <p>The type of training is recorded as the type of service entered into the Service and Training Plan.</p>	<p><b>Required</b></p> <ul style="list-style-type: none"> <li>• Documentation of need for training</li> <li>• Applicable Service and Training Plan entry:             <ul style="list-style-type: none"> <li>○ Occupational Skills Training – Youth</li> <li>○ Adult Basic Education in Conjunction with Training</li> <li>○ Customized Training</li> <li>○ Skill Upgrading &amp; Retraining</li> <li>○ STEM Occupational Skills Training</li> <li>○ Registered Apprenticeship</li> </ul> </li> <li>• Detailed Program note</li> <li>• State and Local policy documentation requirements</li> </ul>

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<p>Participated in Postsecondary Education During Program Participation (WIOA)</p>	<p>When a participant is in a postsecondary education program that leads to a credential or degree from an accredited postsecondary education institution at any point during program participation.</p> <p>This data element relates to the credential indicator denominator and those who are recorded as 1 are included in the credential rate denominator.</p>	<p><b>Required</b></p> <ul style="list-style-type: none"> <li>• Service and Training Plan entry</li> </ul>
<p>Date of First WIOA Youth Service</p>	<p>The date on which the participant began receiving his/her first service funded by the WIOA Youth program following a determination of eligibility to participate in the program.</p> <p>The date of the first Youth service is the actual start date of the first qualifying service. (i.e. objective assessment or individual service strategy).</p>	<p><b>Required</b></p> <ul style="list-style-type: none"> <li>• Service and Training Plan entry</li> </ul>
<p>Most Recent Date Received Educational Achievement Services</p>	<p>Educational Achievement services include, but are not limited to tutoring, study skills training, instruction, and evidence-based dropout prevention and recovery strategies that lead to completion of the requirements for a secondary school diploma or its recognized equivalent (including a recognized certificate of attendance or similar document for individuals with disabilities) or for a recognized postsecondary credential.</p>	<p><b>Required</b></p> <ul style="list-style-type: none"> <li>• Service and Training Plan entry – <i>Tutoring, Study Skills Training, Instruction, and Dropout Prevention</i></li> </ul>

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

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<p>Date Enrolled in Post Exit Education or Training Program Leading to a Recognized Postsecondary Credential</p>	<p>This service should be entered for the Participants who have attended secondary education and obtained a secondary school diploma or its equivalency during program participation and have entered an education or training program that leads to a recognized postsecondary credential after program exit.</p> <p>This data element applies to the Credential Rate indicator.</p>	<p><b>Required</b></p> <ul style="list-style-type: none"> <li>• Service and Training Plan entry AFTER exit– Post-Exit Education/Training Leading to Post Secondary Credential</li> </ul>
<p>Most Recent Date Received Education Offered Concurrently with Workforce Preparation</p>	<p>Education services offered concurrently with and in the same context as workforce preparation activities and training for a specific occupation or occupational cluster.</p> <p>For example, a program developing basic academic skills, which are included as part of alternative secondary school services and dropout recovery services, workforce preparation activities that occur as part of a work experience, and occupational skills training would make up an integrated education and training model.</p>	<p><b>Required</b></p> <ul style="list-style-type: none"> <li>• Service and Training Plan entry – Concurrent Education, Training, &amp; Workforce Preparation</li> </ul>
<p>Most Recent Date Received Leadership Development Opportunities</p>	<p>Leadership development opportunities are services that encourage responsibility, confidence, employability, self-determination, and other positive social behaviors that may include, but are not limited to services such as, exposure to postsecondary educational possibilities, community and service learning projects, peer mentoring, training in decision-making, life skills training, and civic engagement activities.</p>	<p><b>Required</b></p> <ul style="list-style-type: none"> <li>• Service and Training Plan entry – <i>Leadership Development Opportunities</i></li> </ul>

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<p>Most Recent Date Received Supportive Services</p>	<p>Record the most recent date on which the participant received a supportive service which include but are not limited to, assistance with transportation, child care, dependent care, and housing that are necessary to enable the participant to participate in programs which provide career and training services as defined in WIOA sec. 134(c)(2) and 134 (c)(3). Supporting service for youth participants include:</p> <ul style="list-style-type: none"> <li>• Linkages to community services</li> <li>• Assistance with transportation</li> <li>• Assistance with child care and dependent care</li> <li>• Assistance with housing</li> <li>• Needs-related payments</li> <li>• Assistance with educational testing</li> <li>• Reasonable accommodations for youth with disabilities</li> <li>• Referrals to healthcare</li> <li>• Assistance with uniforms or other appropriate work attire and work-related tools, including such items as eye glasses and protective eye gear</li> <li>• Assistance with books, fees, school supplies, and other necessary items for students enrolled in postsecondary education classes;</li> <li>• And payments and fees for employment and training-related applications, tests, and certifications.</li> </ul>	<p><b>Required</b></p> <ul style="list-style-type: none"> <li>• Service and Training Plan entry – <i>Supportive Services</i></li> </ul>
<p>Date Received Financial Literacy Services</p>	<p>Financial literacy education in which youth providers provide financial empowerment tools to equip financial principles, an understanding of consumer protection issues, and an understanding of financial stability.</p>	<p><b>Required</b></p> <ul style="list-style-type: none"> <li>• Service and Training Plan entry – <i>Financial Literacy Education</i></li> </ul>



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<p>Most Recent Date Received Adult Mentoring Services</p>	<p>Adult mentoring service may last for at least twelve months and may occur both during and after program participation and be a formal relationship between a youth participant and an adult mentor that includes structured activities where the mentor offers guidance, support, and encouragement to develop the competence and character of the mentee.</p>	<p><b>Required</b></p> <ul style="list-style-type: none"> <li>• Service and Training Plan entry – Adult mentoring</li> </ul>
<p>Most Recent Date Received Comprehensive Guidance/ Counseling Services</p>	<p>Comprehensive guidance and counseling services which may include drug and alcohol abuse counseling, mental health counseling, and referral to partner programs, as appropriate.</p>	<p><b>Required</b></p> <ul style="list-style-type: none"> <li>• Service and Training Plan entry – Comprehensive Guidance and Counseling</li> </ul>
<p>Most Recent Date Received Youth Follow-up Services</p>	<p>Youth follow-up services are services the youth participant received after exiting the program. Follow-up services for youth participants are described as:</p> <p>a) Critical services provided following a youth’s exit from the program to help ensure the youth is successful in employment and/or postsecondary education and training. Follow-up may include regular contact with a youth participant’s employer, including assistance in addressing work-related problems that arise.</p> <p>b) Services for youth may also include the following program elements:</p> <ul style="list-style-type: none"> <li>• Supportive services</li> <li>• Adult mentoring</li> <li>• Financial literacy education</li> <li>• Services that provide labor market and employment information about in-demand industry sectors or occupations available in the local area, such as career awareness, career counseling, and career exploration services; and</li> </ul>	<p><b>Required</b></p> <ul style="list-style-type: none"> <li>• Service and Training Plan entry – Follow-up Services</li> </ul>

## Youth Eligibility Source Documentation Guide

	<ul style="list-style-type: none"> <li>• Activities that help youth prepare for and transition to postsecondary education and training.</li> </ul> <p>c) Services that align with their Individual Service Strategies. Furthermore, follow-up services must be provided to all participants for a minimum of 12 months unless the participant declines to receive follow-up services or the participant cannot be located or contacted.</p>	
<p>Most Recent Date Youth Received Entrepreneurial Skills Training</p>	<p>Entrepreneurial Skills Training provides the basics of starting and operating a small business. Such training must develop the skills associated with entrepreneurship and may include, but are not limited to the ability to: take initiative, creatively seek out and identify business opportunities, develop budgets and forecast resource needs, understand various options for acquiring capital and the trade-offs associated with each option, and communicate effectively and market oneself and one's ideas.</p>	<p><b>Required</b></p> <ul style="list-style-type: none"> <li>• Service and Training Plan entry – Entrepreneurial Training</li> </ul>
<p>Most Recent Date Youth Received Services that provide labor market information and employment information</p>	<p>Services that provide labor market and employment information about in-demand industry sectors or occupations available in the local area, such as career awareness, career counseling, and career exploration services.</p>	<p><b>Required</b></p> <ul style="list-style-type: none"> <li>• Service and Training Plan entry – Labor Market Information</li> </ul> <p><b>Or</b></p> <ul style="list-style-type: none"> <li>• Service and Training Plan entry – Career Guidance</li> </ul>

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<p>Most Recent Date Youth Received Postsecondary transition and preparatory activities</p>	<p>Activities that helped them to prepare for and transition to postsecondary education and training. Services include exploring postsecondary education options including technical training schools, community colleges, 4-year colleges and universities, and registered apprenticeship. Additional services include but are not limited to assisting youth to prepare for SAT/ACT testing; assisting with college admission applications; searching and applying for scholarships and grants; filling out the proper Financial Aid applications and adhering to changing guidelines, and connecting youth to postsecondary education programs.</p>	<p><b>Required</b></p> <ul style="list-style-type: none"> <li>• Service and Training Plan entry – Postsecondary Preparation and Transition Activities</li> </ul>
<p>Date of Program Exit (WIOA)</p>	<p>The date of program exit is the last date the participant received services (excluding self-service, information-only service or activities, or follow-up services) for at least 90 days, and no future services are planned.</p> <p>The date of program exit is the actual end date of the last qualifying service.</p>	<p><b>Required</b></p> <ul style="list-style-type: none"> <li>• Service and Training Plan entry</li> </ul>

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<p>Other Reasons for Exit (WIOA)</p>	<p>If the Participant exits the program and is unable to continue to receive program services due to any of the following reasons:</p> <ul style="list-style-type: none"> <li>• The participant has become incarcerated in a correctional institution or has become a resident of an institution or facility providing 24-hour support such as a hospital or treatment center during the course of receiving services as a participant.</li> <li>• The participant must undergo medical treatment and that treatment is expected to last longer than 90 days and precludes entry into unsubsidized employment or continued participation in the program.</li> <li>• The participant is deceased.</li> <li>• The participant is a member of the national Guard or other reserve military unit of the armed forces and is called to active duty for at least 90 days.</li> <li>• <b>YOUTH ONLY:</b> The participant is in the foster care system and has moved from the area as part of such a program or system.</li> <li>• The participant is a criminal offender in a correctional institution under section 225 of WIOA</li> </ul>	<p><b>SUPPORTING</b></p> <ul style="list-style-type: none"> <li>• Detailed Program note</li> <li>• Court Documents</li> <li>• Physician’s Statement</li> <li>• Institution or facility Documentation</li> <li>• Death Certificate</li> <li>• Social Service Verification</li> <li>• Military Orders</li> <li>• Written Statement from State or Local Agency</li> </ul> <p><b>REQUIRED:</b> Staff must enter the reason for Exit in the applicable Program Exit Questions section of OKJobMatch and provide detailed program note.</p>
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<p>Supplemental Wages</p>	<p>Supplemental wage information must be collected quarterly after exit, for the previous quarter, be reported in the participant’s applicable program enrollment in OKJobMatch under the program details wages section, and have support documentation uploaded. Information that must be included on source documentation:</p> <ul style="list-style-type: none"> <li>• Quarter for which data is being collected</li> <li>• O*NET code</li> <li>• NAICS Code</li> <li>• Employer FEIN</li> <li>• Employer</li> <li>• Company City</li> <li>• Company State</li> <li>• Total Earnings for Quarter</li> </ul>	<p><b>SUPPORTING</b></p> <ul style="list-style-type: none"> <li>• Tax documents</li> <li>• Payroll records</li> <li>• Employer records</li> <li>• WIOA Participant Supplemental Wage Quarterly Exit Data Collection Form, Attachment L</li> <li>• WIOA Partner’s administrative records containing required employment and wage information</li> <li>• Self-Employment Worksheet, Attachment M</li> </ul> <p><b>REQUIRED:</b> Staff must enter the reason for Exit in the applicable Program Exit Questions section of OKJobMatch and provide detailed program note.</p>
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<p>School Status at Exit</p>	<p>At program exit, school status must be recorded as follows:</p> <ul style="list-style-type: none"> <li>• <b>In-school, secondary school or less:</b> If the participant has not received a secondary school diploma or its recognized equivalent and is attending any secondary school (including elementary, intermediate, junior high school, whether full or part-time), or is between school terms and intends to return to school.</li> <li>• <b>In-school, Alternative school:</b> If the participant has not received a secondary school diploma or its recognized equivalent and is attending an alternative secondary school or an alternative course of study approved by the local educational agency whether full or part-time.</li> <li>• <b>In-school, Postsecondary school:</b> If the participant has received a secondary school diploma or its recognized equivalent and is attending a postsecondary school or program (whether full or part-time, or is between school terms and intends to return to school).</li> <li>• <b>Not attending school or Secondary School Dropout:</b> If the participant is no longer attending any school and has not received a secondary school diploma or its recognized equivalent.</li> <li>• <b>Not attending school: Secondary School Graduate or has a Recognized Equivalent:</b> If the participant is not attending any school and has either graduated from secondary school or holds an equivalency.</li> <li>• <b>Not attending school; within age of compulsory school attendance:</b> If the participant is within the age of compulsory school attendance but has not attended school for at least the most recent complete school year calendar quarter and has not received a secondary school diploma or its recognized equivalent.</li> </ul>	<p><b>Required</b></p> <ul style="list-style-type: none"> <li>• Completion of Exit Questions in applicable program enrollment</li> </ul> <p><b>REQUIRED:</b> Staff must ensure that school status at exit is entered into the applicable Program Outcomes in OKJobMatch as soon as they receive notification of attainment.</p>
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## Youth Eligibility Source Documentation Guide

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

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



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<p>Documentation of Pre-Test and Post-Test Assessments</p>	<p>Documentation of Assessment:</p> <ul style="list-style-type: none"> <li>h) Category of Assessment             <ul style="list-style-type: none"> <li>i. Adult Basic Education (ABE); or</li> <li>ii. English-As-A-Second Language (ESL)</li> </ul> </li> <li>i) Date of Pre-assessment test</li> <li>j) Pre-Test Score:             <ul style="list-style-type: none"> <li>i. Raw scale score</li> </ul> </li> <li>k) Pre-Test Educational Functioning Level (EFL)             <ul style="list-style-type: none"> <li>i. Beginning ABE Literacy</li> <li>ii. Beginning Basic Education</li> <li>iii. Low Intermediate Basic Education</li> <li>iv. High Intermediate Basic Education</li> <li>v. Low Adult Secondary Education</li> <li>vi. High Adult Secondary Education</li> <li>vii. Beginning ESL Literacy</li> <li>viii. Low Beginning ESL</li> <li>ix. High Beginning ESL</li> <li>x. Low Intermediate ESL</li> <li>xi. High Intermediate ESL</li> <li>xii. Advanced ESL</li> </ul> </li> <li>l) Date of Post-Assessment Test</li> <li>m) Post-Test Score</li> <li>n) Post-Test Educational Functioning Level (EFL)</li> </ul>	<p><b>Required</b></p> <ul style="list-style-type: none"> <li>• Applicable Program Enrollment Testing Section             <ul style="list-style-type: none"> <li>○ Pre-Test Score</li> <li>○ Post-Test Score</li> </ul> </li> </ul> <p><b>SUPPORTING SOURCE DOCUMENTATION</b></p> <ul style="list-style-type: none"> <li>• Testing Scores</li> </ul> <p><b>REQUIRED:</b> Staff must ensure that participants Pre-test and Post-test scores are recorded in the Testing Section in the applicable Program Enrollment of OKJobMatch.</p>
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<p>Type of Recognized Credential / Date of Attainment (WIOA)</p>	<p>The type of recognized diploma, degree, or credential consisting of an industry-recognized certificate or certification that is attained either during participation or within one year of exit:</p> <ul style="list-style-type: none"> <li>• Secondary School Diploma/or equivalent</li> <li>• AA or AS Diploma/Degree</li> <li>• BA or BS Diploma/Degree</li> <li>• Occupational Licensure</li> <li>• Occupational Certificate</li> <li>• Occupational Certification</li> <li>• Other Recognized Diploma, Degree, or Certificate</li> </ul>	<p><b>Required</b></p> <ul style="list-style-type: none"> <li>• Applicable Program Outcome entry</li> </ul> <p><b>SUPPORTING SOURCE DOCUMENTATION</b></p> <ul style="list-style-type: none"> <li>• Transcript</li> <li>• Certificate</li> <li>• Diploma</li> <li>• Licensure</li> </ul> <p><b>REQUIRED:</b> Staff must ensure that attained recognized credentials are entered into the applicable Program Outcomes in OKJobMatch as soon as they receive notification of attainment. A detailed Program Note and/or an Update to the participants virtual or uploaded IEP/ISS must be entered in the applicable program enrollment.</p> <p>The date of attainment must match date on source documentation.</p>
<p>Date of Most Recent Measurable Skill Gains (MSG): Educational Functioning Level (EFL) (WIOA)</p>	<p>Title I Youth:</p> <ul style="list-style-type: none"> <li>• In-School Youth: All in-school youth that achieves at least one documented educational functioning level measurable skill gain.</li> <li>• Out-of-School Youth: Out of school who are receiving instruction below the postsecondary education level, are receiving an Occupational Skills Training, Title II funded adult education service, Youthbuild service, or Job Corps service during participation in the Title I Youth program, and achieves at least one documented educational functioning level measurable skill gain.</li> </ul>	<p><b>Required</b></p> <ul style="list-style-type: none"> <li>• Service &amp; Training Plan             <ul style="list-style-type: none"> <li>○ Training that leads to a credential</li> </ul> </li> <li>• Measureable Skill Gain – Educational Functioning Level</li> <li>• Testing             <ul style="list-style-type: none"> <li>○ Pre-Test Score</li> <li>○ Post-Test Score</li> </ul> </li> </ul> <p><b>SUPPORTING SOURCE DOCUMENTATION</b></p> <ul style="list-style-type: none"> <li>• Testing Scores</li> </ul>

## Youth Eligibility Source Documentation Guide

	<p>An educational functioning level measurable skill gain may be achieved and documented in one of three ways:</p> <ol style="list-style-type: none"> <li>4. Comparing a participant’s initial EFL as measured by a pre-test with the participant’s EFL as measured by a participant’s post-test; or</li> <li>5. For States that offer secondary school programs that lead to a secondary school diploma or its recognized equivalent, an EFL gain may be measured through the awarding of credits or Carnegie units; or</li> <li>6. States may report and EFL gain for participants who exit the program and enroll in postsecondary education or training during the program year.</li> </ol>	<p>Staff must ensure that demographic information (school status and English language learner or basic skills deficient/low levels of literacy) is entered correctly during the eligibility process and that a program service that leads to a credential is entered into Service and Training Plan in the applicable program enrollment in OKJobMatch.</p> <p>Staff must ensure that participants Pre-test and Post-test scores are recorded in the Testing Section in applicable program enrollment of OKJobMatch.</p> <p>Staff must ensure that an Educational Functioning Level MSG is entered into the Measurable Skills Gain screen in the applicable program enrollment in OKJobMatch.</p>
<p>Date of Most Recent Measurable Skill Gains: Postsecondary Transcript/Report Card (WIOA)</p>	<p><b>Title I Youth:</b></p> <ul style="list-style-type: none"> <li>• In-School Youth: All in-school youth that who achieve a documented postsecondary transcript/report card measurable skill gain.</li> <li>• Out-of-School Youth: Out of school who are receiving an Occupational Skills Training, Title II funded adult education service, Youthbuild service, or Job Corps service during participation in the Title I Youth program, and achieve a documented postsecondary transcript/report card measurable skill gain.</li> </ul> <p>A postsecondary transcript/report card measurable skill gain may be achieved and documented by one of the following ways:</p> <ol style="list-style-type: none"> <li>3. The participant’s transcript or report card from a postsecondary education institution demonstrating a minimum of 12 hours per semester, that shows the participant is meeting Oklahoma’s academic standards, or</li> </ol>	<p><b>Required</b></p> <ul style="list-style-type: none"> <li>• Service &amp; Training Plan             <ul style="list-style-type: none"> <li>○ Training that leads to a credential</li> </ul> </li> <li>• Measureable Skill Gain – Post-Secondary Transcript/Report Card</li> </ul> <p><b>SUPPORTING SOURCE DOCUMENTATION</b></p> <ul style="list-style-type: none"> <li>• Report Card (12 hours)</li> <li>• Transcript (12 hours)</li> </ul> <p>Staff must ensure that a program service that leads to a credential is entered into Service and Training Plan in the applicable program enrollment in OKJobMatch.</p> <p>Staff must ensure that a Post-Secondary Transcript/Report Card MSG is entered into the Measurable Skills Gain screen in the applicable program enrollment in OKJobMatch.</p>

## Youth Eligibility Source Documentation Guide

	<p>4. For part time students, the participant’s transcript or report card from a postsecondary education institution demonstrating a total of at least 12 credit hours over the course of two completed semesters during the same 12-month period, that shows the participant is meeting Oklahoma’s academic standards.</p>	
<p>Date of Most Recent Measurable Skill Gains: Secondary Transcript/Report Card (WIOA)</p>	<p><b>Title I Youth:</b></p> <ul style="list-style-type: none"> <li>• In-School Youth: All in-school youth who achieve a documented secondary transcript/report card measurable skill gain.</li> <li>• Out-of-School Youth: Out of school who are receiving an Occupational Skills Training, Title II funded adult education service, Youthbuild service, or Job Corps service during participation in the Title I Youth program, and achieve a documented postsecondary transcript/report card measurable skill gain.</li> </ul> <p>A secondary transcript/report card measurable skill gain may be achieved and documented by:</p> <ol style="list-style-type: none"> <li>2. The participant’s transcript or report card for secondary education for one semester showing that the participant is meeting Oklahoma’s academic standards.</li> </ol>	<p><b>Required</b></p> <ul style="list-style-type: none"> <li>• Service &amp; Training Plan             <ul style="list-style-type: none"> <li>○ Training that leads to a credential</li> </ul> </li> <li>• Measureable Skill Gain – Secondary Transcript/Report Card</li> </ul> <p><b>SUPPORTING SOURCE DOCUMENTATION</b></p> <ul style="list-style-type: none"> <li>• Report Card (semester)</li> <li>• Transcript (semester)</li> </ul> <p>Staff must ensure that a program service that leads to a credential is entered into Service and Training Plan in the applicable program enrollment in OKJobMatch.</p> <p>Staff must ensure that a Secondary Transcript/Report Card MSG is entered into the Measurable Skills Gain screen in the applicable program enrollment in OKJobMatch.</p>

## Youth Eligibility Source Documentation Guide

<p>Date of Most Recent Measurable Skill Gains: Training Milestone (WIOA)</p>	<p><b>Title I Youth:</b></p> <ul style="list-style-type: none"> <li>• In-School Youth: All in-school youth who achieve a documented training milestone measurable skill gain.</li> <li>• Out-of-School Youth: Out of school who are receiving an Occupational Skills Training, Title II funded adult education service, Youthbuild service, or Job Corps service during participation in the Title I Youth program and achieve a documented training milestone measurable skill gain.</li> </ul> <p>A training milestone measurable skill gain may be achieved and documented by:</p> <ol style="list-style-type: none"> <li>2. The documentation of a participant’s satisfactory or better progress towards established milestones from and employer/training provider who is providing training (e.g., completion of on-the-job training (OJT), completion of one year of a registered apprenticeship program, etc.).</li> </ol>	<p><b>Required</b></p> <ul style="list-style-type: none"> <li>• Service &amp; Training Plan             <ul style="list-style-type: none"> <li>○ Training that leads to a credential</li> </ul> </li> <li>• Measureable Skill Gain – Training Milestone</li> </ul> <p><b>SUPPORTING SOURCE DOCUMENTATION</b></p> <ul style="list-style-type: none"> <li>• Training provider reports</li> <li>• Pay stubs (increase in pay must be from acquired skills or increased performance)</li> <li>• Employer progress report (substantive skill development)</li> <li>• OJT completion verification</li> <li>• Registered Apprenticeship completion verification</li> </ul> <p>Staff must ensure that a program service that leads to a credential is entered into Service and Training Plan in the applicable program enrollment in OKJobMatch.</p> <p>Staff must ensure that a Training Milestone MSG is entered into the Measurable Skills Gain screen in the applicable program enrollment in OKJobMatch.</p> <p>Source documentation must document newly acquired skills or increased performance as a result of the training received.</p>
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## Youth Eligibility Source Documentation Guide

<p>Date of Most Recent Measurable Skill Gains: Skills Progression (WIOA)</p>	<p><b>Title I Youth:</b></p> <ul style="list-style-type: none"> <li>• In-School Youth: All in-school youth who achieves a documented skills progression measurable skill gain.</li> <li>• Out-of-School Youth: Out of school who are receiving an Occupational Skills Training, Title II funded adult education service, Youthbuild service, or Job Corps service during participation in the Title I Youth program and achieves a documented skills progression measurable skill gain.</li> </ul> <p>A skill progression measurable skill gain may be achieved and documented by:</p> <ol style="list-style-type: none"> <li>2. The documentation of a participant successfully completing an exam that is required for a particular occupation, or progress in attaining technical or occupational skills as evidenced by trade-related benchmarks such as knowledge-based exams.</li> </ol>	<p><b>Required</b></p> <ul style="list-style-type: none"> <li>• Service &amp; Training Plan             <ul style="list-style-type: none"> <li>○ Training that leads to a credential</li> </ul> </li> <li>• Measureable Skill Gain – Exam Passage/Skills Progression</li> </ul> <p><b>SUPPORTING SOURCE DOCUMENTATION</b></p> <ul style="list-style-type: none"> <li>• Exam completion verification</li> </ul> <p>Staff must ensure that a program service that leads to a credential is entered into Service and Training Plan in the applicable program enrollment in OKJobMatch.</p> <p>Staff must ensure that a Skill Progression MSG is entered into the Measurable Skills Gain screen in the applicable program enrollment in OKJobMatch.</p>
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## WIOA Income Eligibility Form: Part I

### IDENTIFYING INFORMATION

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

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

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

**Family Composition:** List each family member. Family is two or more persons related by blood, marriage, or decree of court, who are living in a single residence. (Married couple & dependent children: parent or guardian & dependent children; or married couple).

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

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

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

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

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### WIOA Income Calculation Worksheet: Part II

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

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

**Family Member:** \_\_\_\_\_ **Relationship:** \_\_\_\_\_

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

Employer or Income Source	Pay Date	# of Pay Periods Weekly=26, Bi-weekly=13, Monthly=6	=	Pay Period Gross Pay
1			=	
2			=	
3			=	
4			=	
<b>6-Month Income:</b> Sum of all Pay Period Gross Pays				=

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

Employer or Income Source	Pay Date	Gross Pay	÷	# Weeks in Time Frame: Weekly = 1, bi-weekly = 2, monthly = 4.3	=	Weekly Gross Income
1			÷		=	
2			÷		=	
3			÷		=	
<b># of Pay Stubs Collected</b>		<b>Sum of Weekly Gross Income</b>			+	
<b>Average Weekly Gross:</b> Sum of Weekly Income ÷ # of Pay Stubs						=
<b>6-Month Income:</b> Average Weekly Gross × 26 (there are 26 weekly pay days in a six-month period)						=

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

Employer or Income Source	Pay Date	Cumulative year-to-date Gross Pay	÷	# of cumulative weeks on pay stub	=	Weekly Gross Income
1			÷		=	
2			÷		=	
<b>Sum of Weekly Gross Income (Average Weekly Gross Income):</b>					+	
<b>6-Month Income:</b> Average Weekly Gross × 26 (there are 26 weekly pay days in a six-month period)						=

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

Employer	Description of Work	Start Date	End Date	Total Gross Income
1				
2				
<b>6-Month Income:</b> Sum of all Total Gross Incomes				=

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## Guidelines for Income Calculation Worksheet: Part II

When calculating income, use any one of the following methods as appropriate. A separate form should be used for each family member with income. The examples are illustrative only and as many pay stubs as needed and available to accurately calculate family income should be obtained.

### 1. STRAIGHT PAY METHOD

Under the Straight Pay Method, pay stubs covering the most recent three to four months of family income should be submitted. Upon review, it is determined that the wages on the pay stubs are the same, with no variations.

The income is calculated based upon the wages indicated on one of the pay stubs, since there are no variations in the gross income on any of the pay stubs. Based upon the length of the pay period the gross income is multiplied by the number of pay periods in a six-month period (weekly = 26, bi-weekly = 13, or monthly = 6).

The result will be the six-month income used to determine WIOA low-income eligibility.

#### EXAMPLE:

Five bi-weekly pay stubs are provided indicating gross wages of \$548.00 each. The pay stubs are sporadic and cover a period of three months but there is no variation in the gross income.

Multiply:  $\$548 \times 13 = \$7,124$ .

\$7,124 is the six-month income used to determine WIOA low-income eligibility.

### 2. AVERAGE PAY METHOD

Average Pay Method is used if there is a variation in pay from pay stub to pay stub and it is a result of overtime, lost time, or working for different employers.

To compute the six-month income, the gross earning total of all the pay stubs provided is divided by the number of weeks in the timeframe for each pay stub submitted (weekly = 1, bi-weekly = 2, monthly = 4.3). These totals are added together and divided by the number of pay stubs submitted. The resulting average gross weekly income is then divided by 26 determining the 6-month income.

#### EXAMPLE:

##### Example 1:

Three pay stubs are provided and the pay frequency is bi-weekly: \$1,009, \$932, \$1,032

Divide each amount by 2 (bi-weekly:  $1009/2 = \$504.50$ ;  $932/2 = \$466$ ;  $1032/2 = \$516$ )

Add totals together:  $\$504.50 + \$466 + \$516 = \$1486.50$

Divide by 3 (# of pay stubs submitted):  $\$1486.50/3 = \$495.50$

Multiply total by 26 (# of weeks in a 6-month period):  $\$495.50 \times 26 = \$12,883$

\$12,883 is the six-month income amount used to determine WIOA low-income eligibility.

Example 2:

Six pay stubs are provided and the pay frequency is weekly: \$534, \$475, \$398, \$534, \$498, and \$534

\*You can skip the first step since the pay frequency is weekly and you would be dividing each amount by 1

Add:  $\$534 + \$475 + \$398 + \$534 + \$498 + \$534 = \$2973.00$

Divide by 6 (# of pay stubs submitted):  $\$2973/6 = \$495.50$

Multiply total by 26:  $\$495.50 \times 26 = \$12,883.$

\$12,883 is the six-month income amount used to determine WIOA low-income eligibility.

### 3. YEAR-TO-DATE METHOD

Under the Year-To-Date Method of calculating six-month gross income, the participant provides recent pay stubs with cumulative year-to-date gross earnings indicated on the pay stub. The cumulative year-to-date gross earnings indicate the gross earnings up to the date of the pay period ending date, on the pay stub.

To compute the six-month income, the intake worker counts the number of cumulative weeks that have occurred in the year-to-date period, and divides that number into the gross year-to-date earnings indicated on the pay stub to get the weekly gross income. The result of this computation weekly gross income is then multiplied by the number of weeks in a six-month period to determine the six-month gross earnings.

#### EXAMPLE:

Participant provides the intake worker with a recent pay stub dated July 3<sup>rd</sup> showing his **year-to-date earnings** were \$25,200 so far that year. The cumulative number of weeks for the year is 27, Calculation of the gross annualized income would be done as follows:

Divide: 25,200 by 27 = \$933

Multiply: \$933 by 26 (No. of weeks in 6 months) = \$24,258

\$24,258 is the 6-month income figure for this individual or family member.

### 4. INTERMITTENT WORK METHOD

When an applicant has not had steady work with one or more employers, they should supply as many pay stubs as possible and complete an Applicant Statement explaining all missing pay stubs and not-work periods during the last six months.

If an applicant reports little or no includable income, they should indicate the resources relied upon for life support during the last six months, on the Applicant Statement. Such resources may include such things as unpaid debts, gifts, loans, unemployment compensation, etc.

## CLIENT INVOLVEMENT STATEMENT

### CLIENT INVOLVEMENT STATEMENT

- In consulting with my Case Manager, I have determined that the employment goals and services strategy stated in the ISS/IEP developed and dated \_\_\_\_\_ is my choice and is consistent with my assessment results.
- I also understand that this is a general plan of services and training and it is neither entitlement nor a contract between the program and the client at this time.
- I understand that I am responsible for my actions.
- I understand that my goal for completing this plan is to become self-sufficient.

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**PARTICIPANT'S SIGNATURE**

**DATE**

**NAME:** \_\_\_\_\_

**OSL PID:** \_\_\_\_\_

**CASE MANAGER:** \_\_\_\_\_

**OFFICE:** \_\_\_\_\_

## Individual Training Account (ITA) Agreement

Participant: \_\_\_\_\_ ID# \_\_\_\_\_

ITA Start Date: \_\_\_\_\_ ITA End Date: \_\_\_\_\_

Amount of Individual Training Account (ITA): \$ \_\_\_\_\_

Training Provider: \_\_\_\_\_

Demand Occupation: \_\_\_\_\_

### ACKNOWLEDGEMENT AND AGREEMENT

- The amount of my Individual Training Account (ITA) has been awarded based on individual factors including cost of attendance, coordination of other funding sources, and needs identified in my Individual Employment Plan (IEP).
- ITA funding may be used to assist with tuition and fees as well as books, uniforms, tools, equipment, or supplies required for training/degree plan.
- This ITA is limited to the amount and the scheduled start and end date stated above. Any modification to the ITA Agreement must be approved per Workforce Development Board policy and only for exceptional circumstances.
- It is my responsibility to budget and track my ITA expenditures to insure that the funds available to me are not depleted prior to completion of training. I will coordinate with my Career Manager and verify my ITA balance as necessary.
- I understand that I must meet or exceed attendance and academic requirements of the school/training provider.
- I understand that I am not required to access student loans or incur personal debt as a condition of participation. However, if I chose to do so, I understand the responsibilities associated with such indebtedness, including loan repayment. My Career Manager has counseled me in regard to this issue.
- Continued participation is subject to continued availability of funding by the Department of Labor.
- I agree to monthly contact with my Career Manager to discuss my training progress and any other issues, whether academic, personal, or financial, which may affect the successful completion of my training.
- I will immediately inform my Career Manager of changes of name, address, phone number, email address or back-up contact information.
- Prior to the beginning of each new semester I will schedule an appointment with my Career Manager to complete a voucher for the upcoming semester. I agree to provide any documentation necessary for completion of the voucher, which may include class schedule, enrollment sheet, grade report from previous semester, and Financial Aid Award letter.
- In the event that I drop or add a class, I will notify my Career Manager immediately.
- ITA funding may be used to pay only for classes or training directly related to my training/degree plan. ITA funding will not be used to pay for the same class more than once. If I fail a class, I will be responsible for paying for such class the second time.
- Upon completion of my training, I agree to provide my Career Manager with information concerning my employment and copies of any diplomas, credentials, or licenses earned.

**I have read this document and hereby understand and agree to comply with the terms herein described. I am receiving a copy of this agreement for my records.**

\_\_\_\_\_  
**ITA Participant's Signature**

\_\_\_\_\_  
**Date**

**I have established this ITA and reviewed the terms of this Agreement with the client.**

\_\_\_\_\_  
**WIOA Service Provider's Signature**

\_\_\_\_\_  
**Date**

ITA # _____
-------------

**INDIVIDUAL TRAINING VOUCHER FORM**

Training Institution/Provider: \_\_\_\_\_

Mod #: \_\_\_\_\_

Participant Name: \_\_\_\_\_

ID #: \_\_\_\_\_

WIOA Program/Funding Stream:  TAA  Adult  DW  Other: \_\_\_\_\_

\_\_\_\_\_  
(WIOA Service Provider) agrees to sponsor the above named student in the course(s) or program(s) listed below and pay the training costs listed (based on off-the-shelf catalog prices) for the time period of: \_\_\_\_\_ through \_\_\_\_\_. Refunds or returns for non-compliance will be made to \_\_\_\_\_ (WIOA Service Provider) \_\_\_\_\_.

Explanation if this is a Modification:

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

**TRAINING**

Course #	Course Title	Hours

**AUTHORIZED TRAINING COSTS**

Items	Amount	Items	Amount
Tuition	\$	Uniforms	\$
Fees	\$	Tools:	\$
Supplies	\$	Books:	\$
Books	\$	Other:	\$
			<b>TOTAL \$</b>

As the recipient of Workforce Innovation & Opportunity Act (WIOA) Program assistance with tuition, books, fees, or other required supplies, I hereby authorize the training institution listed above to release information regarding my attendance, grades, schedules, personal conduct and/or other information as needed to the \_\_\_\_\_ (WIOA Service Provider) \_\_\_\_\_.

\_\_\_\_\_  
Participant Signature

\_\_\_\_\_  
WIOA Service Provider Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Date

**COORDINATION OF TRAINING FUNDS**

**SECTION I**

TO: FINANCIAL AID OFFICE

ATTENTION: \_\_\_\_\_

FROM: \_\_\_\_\_

SCHOOL: \_\_\_\_\_

ATTENTION: \_\_\_\_\_

FAX OR E-MAIL ADDRESS: \_\_\_\_\_

FAX OR E-MAIL ADDRESS: \_\_\_\_\_

PARTICIPANT NAME: \_\_\_\_\_

ID NUMBER: \_\_\_\_\_

I hereby authorize the exchange of information between the WIOA Case Manager and the Financial Aid Office at the above named School regarding the awarding of any financial aid from any source.

\_\_\_\_\_  
Participant's Signature

\_\_\_\_\_  
Date

**SECTION II: The following section is to be completed by the financial aid office.**

**PERIODS COVERED**

Start Date: \_\_\_\_\_

End Date \_\_\_\_\_

- Fall \_\_\_\_\_
- Spring \_\_\_\_\_
- Summer \_\_\_\_\_

- Trimester I
- Trimester II
- Trimester III

- Full Length of Short Course

**COST OF ATTENDANCE \***

**STUDENT'S FINANCIAL AID**

Tuition and Fees \$ \_\_\_\_\_  
Books, Supplies and Tools \$ \_\_\_\_\_  
Uniforms \$ \_\_\_\_\_

PELL Grant Eligibility \$ \_\_\_\_\_  
\_\_\_\_\_ Student or Program is not PELL eligible

**OTHER FINANCIAL RESOURCES EXCLUDING LOANS AND VA BENEFITS**

**OTHER EXPENSES RELATED TO TRAINING \*\***

\_\_\_\_\_ \$ \_\_\_\_\_  
\_\_\_\_\_ \$ \_\_\_\_\_  
\_\_\_\_\_ \$ \_\_\_\_\_  
\_\_\_\_\_ \$ \_\_\_\_\_  
\_\_\_\_\_ \$ \_\_\_\_\_  
\_\_\_\_\_ \$ \_\_\_\_\_  
TOTAL COST OF ATTENDANCE \$ \_\_\_\_\_

\_\_\_\_\_ \$ \_\_\_\_\_  
\_\_\_\_\_ \$ \_\_\_\_\_  
\_\_\_\_\_ \$ \_\_\_\_\_  
\_\_\_\_\_ \$ \_\_\_\_\_  
\_\_\_\_\_ \$ \_\_\_\_\_  
TOTAL FINANCIAL AID \$ \_\_\_\_\_

Total Cost of Attendance \$ \_\_\_\_\_ minus Student's Financial Aid \$ \_\_\_\_\_ equals Unmet Financial Need \$ \_\_\_\_\_

*By signing below, the financial aid officer (or those personnel who perform those duties) agrees to inform the local WIOA program operator of the amounts and disposition of financial aid to each participant awarded after the enrollment of the participant, as part of a continuing, regular information sharing process.*

\_\_\_\_\_  
Financial Aid Officer

\_\_\_\_\_  
Date

*\*As defined by the Higher Education Act Section. 472*

*\*\*Other expenses related to training may include transportation, room and board, vehicle insurance, and other items necessary for attendance as defined by local policy.*

**SECTION III: The following section is to be completed by the WIOA Case Manager.**

After a comprehensive review of services provided by partner agencies, other social service agencies, and other community resources, I have determined that WIOA funds are necessary for attainment of the participant's employment goal. I certify that WIOA funds will be coordinated with other funds and there will be no duplication of resources.

\_\_\_\_\_  
WIOA Service Provider's Signature

\_\_\_\_\_  
Date

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

## WIOA Youth Eligibility Form

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

**General Eligibility – Verify all of the following criteria.**

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

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

CRITERIA	IDENTIFY SOURCE DOCUMENT(S)
<b>See 681.210 and State Policy for full text...</b>	<b>(source document must be uploaded)</b>
1. A school dropout	
2. 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...	
3. A recipient of a secondary school diploma or its recognized equivalent who is a <b>low-income</b> individual and is either basic skills deficient or an English language learner.	
4. An offender	
5. A homeless individual aged 16 to 24...	
6. An individual in foster care or who has aged out of the foster care...	
7. An individual who is pregnant or parenting...	
8. An individual with a disability...	
9. A <b>low-income</b> individual who requires additional assistance to enter or complete an educational program or to secure or hold employment...	

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

CRITERIA	IDENTIFY SOURCE DOCUMENT(S)
<b>See 681.220 and State Policy for full text...</b>	<b>(source document must be uploaded)</b>
1. Basic skills deficient	
2. An English language learner	
3. An offender	
4. A homeless individual aged 14 to 21...	
5. An individual in foster care or who has aged out of the foster care...	
6. An individual who is pregnant or parenting	
7. An individual with a disability	
8. An individual who requires additional assistance to complete an educational program or to secure or hold employment...	

# WIOA Youth Support Form

**IDENTIFYING INFORMATION**

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

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

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

**If an individual is not living in a single residence with other family members, that individual is not a member of a family for the purpose of WIOA income calculations.**

20 CFR § 675.300 defines family as "two or more persons related by blood, marriage, or decree of court, who are living in a single residence, and are included in one or more of the following categories: (1) A married couple and dependent children; (2) A parent or guardian and dependent children; or (3) A married couple."

Circumstances where only the youth's income is considered in determining whether the youth satisfies WIOA income limits for the program. 20 CFR § 681.280 provides that:

- OSY with a disability: NOT REQUIRED TO BE LOW-INCOME** (20 CFR § 681.280) This includes all other OSY barriers other than the two barriers of OSY that are required to be low-income.
- ISY with a disability: My own income, rather than my family's income, must meet the low-income definition and not exceed the higher of the poverty line or 70 percent of the LLSIL.**

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

Applicant Signature \_\_\_\_\_ Date \_\_\_\_\_

Parent/Guardian or Other Responsible Adult Signature \_\_\_\_\_ Date \_\_\_\_\_

Case Manager Signature \_\_\_\_\_

Date \_\_\_\_\_



## WIOA School Dropout Status Form

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

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

**Last School Attended:** \_\_\_\_\_

**Location:** \_\_\_\_\_

**Dates of Attendance:** \_\_\_\_\_

**Highest Grade Level Completed:** \_\_\_\_\_

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

\_\_\_\_\_  
Applicant Signature

\_\_\_\_\_  
Date

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

\_\_\_\_\_  
Date

CERTIFICATION
---------------

I certify that the information recorded on this form was provided by the individual whose signature appears above.

\_\_\_\_\_  
Case Manager Signature

\_\_\_\_\_  
Date

## YOUTH TRAINING PROVIDER PROCUREMENT FORM

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

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

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

## Documents to Verify Eligibility to Work

### LIST A: Documents That Establish Both Identity and Employment Authorization

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

**OR**

### LIST B: Documents That Establish Identity

For Individuals 18 years of age or older:

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

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

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

**AND**

### LIST C: Documents That Establish Employment Authorization

1. U.S. Social Security card other than one that specifies the face that the issuance of the card does not authorize employment in the United States.  
\*Note: A copy (such as a metal or plastic reproduction) is not acceptable
2. Certification of Birth Abroad issued by the U.S. Department of State (Form FS-545)
3. Certification of Report of Birth issued by the U.S. Department of State (Form DS-1350)
4. Original or certified copy of a birth certificate issued by a state, county, municipal authority, or outlying possession of the United States bearing an official seal
5. Native American tribal document
6. U.S. Citizen Identification Card (Form I-197)
7. Identification Card for Use of Resident Citizen in the United States (Form I-179)
8. Employment authorization document issued by Department of Homeland Security

# Applicant Statement

## IDENTIFYING INFORMATION

Applicant's Name: \_\_\_\_\_

Last

First

MI

Participant ID: \_\_\_\_\_

Application Date: \_\_\_\_\_

Family is two or more persons related by blood, marriage, or decree of court, who are living in a single residence.

- Married Couple & Dependent Children
- Parent or Guardian & Dependent Children
- Married Couple

### Applicant Statement:

Please provide a brief description on your lack of or unverifiable income, the income documentation limitations, and how you have been supported for the 6-month period prior to application. If unable to obtain a satisfactory witness, please explain below.

I hereby certify, under penalty of perjury, that the information stated above is true and accurate, and I understand that the above information, if misrepresented, or incomplete, may be grounds for immediate termination and/or penalties as specified by law.

\_\_\_\_\_  
Applicant's Signature

\_\_\_\_\_  
Date

### Corroborative Witness Statement:

Please provide a brief description below describing your knowledge of the above participants household income as you understand it:

I hereby certify, under penalty of perjury, that the information stated above is true and accurate, and I understand that I am a corroborating witness and that I possess the knowledge to validate the participants statement as listed above.

\_\_\_\_\_  
Witness' Signature

\_\_\_\_\_  
Witness Printed Name

\_\_\_\_\_  
Date

\_\_\_\_\_  
Witness' Relationship to Applicant

\_\_\_\_\_  
Witness' Contact Information

## Office Use Only

The above applicant statement is being utilized for documentation of low income for eligibility purposes, I have reviewed all documentation sources and documentation limitations with the participant and the corroborative witness.

\_\_\_\_\_  
Case Manager Signature

\_\_\_\_\_  
Date

## WIOA Participant Supplemental Wage Quarterly Exit Data Collection Form

During orientation, you were informed that we would be contacting those who participated in our education or training program to find out how you are progressing after completing the program. We would like to know if our program helped you achieve your goal of entering postsecondary education/training or obtaining/retraining employment.

This survey will only take a few minutes and all information you give will be strictly confidential.

Name: \_\_\_\_\_

Date: \_\_\_\_\_

PID: \_\_\_\_\_

### POSTSECONDARY EDUCATION AND TRAINING

- Since the end of your program, have you enrolled in any postsecondary educational or training programs?  
 Yes (Proceed to Next Question)    No (Proceed to Employment Questions)
- In what type of class or classes have you enrolled? (Check all that apply.)  
 Adult Workforce Education/Job Training/Career Center/Skilled Trades Program  
 College  
 Other (Specify) \_\_\_\_\_  
 Do not know or Prefer not to answer

### EMPLOYMENT (SUPPLEMENTAL WAGE VERIFICATION)

- Are you currently Employed?    Yes    No
- Since completing our program, please select the 3-month period(s) you have been employed.  
 January to March    April to June    July to September    October to December
- Place of Employment during the previous 3-month period:  
Employer: \_\_\_\_\_ Type of Employment: \_\_\_\_\_  
Employer FEIN (if known): \_\_\_\_\_
- Is the job related to any education/training you received during the program you attended?  
 Yes    No
- Approximately how many hours do you work each week? \_\_\_\_\_ Hours
- Wage during the previous 3-month period of employment: \$\_\_\_\_\_  hourly    weekly    monthly    yearly
- Reason for Unemployment.  
 Insufficient Employment Opportunity    Self-Employed/Lack of Work    Military relocation  
 Unemployed due to Termination/Layoff  
 Unemployed due to permanent closure/substantial layoff at place of employment  
 Other \_\_\_\_\_  
 Prefer Not to Answer

### CLOSING

Do you have any questions or comments?

Staff Use Only: (If Completed by Phone)

Survey administered by: \_\_\_\_\_ Date: \_\_\_\_\_

Staff Use Only:  
Gross Quarterly Wage Calculation:

\_\_\_\_\_



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**SUPPLEMENTAL WAGE SELF-EMPLOYMENT VERIFICATION FORM**

List all gross receipts and total expenses for the previous three months. Subtract total expenses from gross receipts to calculate Net Profit for each Month. Add Net Profit for previous three months to obtain the **Total Net Profit (Earnings)** for the Previous Quarter.

Name: \_\_\_\_\_

Business Name: \_\_\_\_\_

Date: \_\_\_\_\_

PID: \_\_\_\_\_

	MONTH _____	MONTH _____	MONTH _____
Wages			
Commission			
Bonuses			
Cash Value of Compensation other than cash			
Gratuities			
Wages earned but not received			
Other includable income (Specify below):			
<b>Gross Receipts</b>			

	MONTH _____	MONTH _____	MONTH _____
Business Rent			
Business Telephone			
Business Utilities			
Business Supplies			
Other expenses (Specify below):			
<b>Total Expenses</b>			

	MONTH _____	MONTH _____	MONTH _____
<b>Net Profit</b>			

Total Net Profit (Earnings): _____
------------------------------------

I, \_\_\_\_\_, certify that the information stated above is true and accurate, and there is no intent to commit fraud. I am aware that the information I have provided is subject to review and verification, and that I may be required to document its accuracy.

Signature: \_\_\_\_\_

Date: \_\_\_\_\_



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# Wage Conversion Chart

This is a guide to convert various wage and earnings inputs to a quarterly wage					
<b>Directions:</b> Collect the hourly/weekly/bi-weekly/monthly/annual wages from the participant and enter that value in the appropriate cell*. The example input values in <b>red</b> must be replaced with the appropriate information collected from the participant to calculate the reportable quarterly wage.					
Convert Hourly Rate to Quarterly Wages					
Hourly Rate (\$xxx.xx/hour)	hours worked per week on average (xx.x)	13 weeks per quarter			Quarterly Wages
<b>\$7.25</b>	X	<b>32.0</b>	X	13	= \$3,016.00
Convert Weekly Wages to Quarterly Wages					
Weekly Wages (\$xxxxx.xx)		13 weeks per quarter			Quarterly Wages
<b>\$290.00</b>	X	13			= \$3,770.00
Convert Biweekly Wages to Quarterly Wages					
Biweekly Wages (\$xxxxx.xx)		6.5 biweekly pay periods per quarter			Quarterly Wages
<b>\$580.00</b>	X	6.5			= \$3,770.00
Convert Monthly Wages to Quarterly Wages					
Monthly Wages (\$xxxxx.xx)		3 months per quarter			Quarterly Wages
<b>\$1,256.67</b>	X	3			= \$3,770.01
Convert Annual Wages to Quarterly Wages					
Annual Wages (\$xxxxxx.xx)		4 quarters per year			Quarterly Wages
<b>\$15,080.00</b>	/	4			= \$3,770.00