



Workforce Development Board Policy ☒ Standard Operating Procedures ☒

Topic: WIOA Adult and DW Services

Date: July 1, 2025

☒ New

☐ Revised

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Purpose

This policy establishes policies and procedures for determining eligibility, enrolling participants, delivering services, and exiting individuals in the WIOA Adult and Dislocated Worker (DW) programs of the Portland Metro Workforce Development area. It ensures compliance with the Workforce Innovation and Opportunity Act (WIOA) federal and state requirements while supporting consistent service delivery, program accountability, and positive employment outcomes for participants.

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Policy Statement

Services for Workforce Innovation and Opportunity Act (WIOA) Adult and Dislocated Worker (DW) participants in the Portland Metro area are offered through the established network of WorkSource Portland Metro Centers (WSPM) and select Service Provider Contractors. Individuals must be determined eligible, registered and enrolled in the WIOA WSPM fund in I-Trac to receive any WIOA Adult or DW funded service with the exception of *Self-Directed/Informational* services as defined below in this policy.

Eligibility – WIOA Adult & Dislocated Worker Program

WIOA Adult

An Applicant is eligible as a WIOA Adult if they are:

- Age 18 or older.
- In compliance with Selective Service Registration requirements.

WIOA Dislocated Worker

An Applicant is eligible as a WIOA Dislocated Worker if they:

- Validate their name and date of birth (no minimum age requirement)
- Are in compliance with Selective Service Registration requirements
- Authorized to work in the United States (work authorization)
- Meet one of the following dislocation types.

Dislocation Types

Terminated or Laid-off Worker

The Applicant must meet *each of the requirements* in A, B and C:

- A. Has been terminated or laid off or has received a notice of termination or layoff from employment, including a separation notice from active military service (refer to Separating Service Member below for additional detail).
- B. Is either eligible for or has exhausted their unemployment insurance compensation or have been employed for a period of at least three months to show attachment to the workforce, but they are not eligible for unemployment insurance compensation due to insufficient earnings or having worked for an employer that is not covered under the State unemployment compensation law.
- C. Is unlikely to return to their previous industry or occupation. This can be due to any of the following circumstances:
 - Because of negative economic conditions or sudden economic impact on industries or occupations (e.g., pandemic or natural disaster impacts).
 - Because there is a decline in the Applicant's previous occupations in the local market.
 - Because of circumstances that cause significant barriers to employment, such as criminal background, lack of high school diploma or GED, disability, homelessness, cultural or language barriers, older worker (55+) or deficient in basic skills.
 - Because their previous industry or occupation has been eliminated or the Applicant has been unable to secure a position at a compensation level comparable to their previous occupation.
 - Because they exhausted their unemployment benefits and have been unable to find a job in their previous industry or occupation.
 - Because they were seasonally employed and unlikely to return because of mechanization or significant variance to normal seasonal employment patterns, resulting in uncertain return-to-work duties.

Business Closed or has had a Substantial Lay-off

The Applicant must meet *one of the following* requirements:

- A. Has been terminated or laid off or has received notice of termination or layoff from employment because of the permanent closure of, or any substantial layoff at (defined as 10 or more affected workers) the company (includes a plant, facility, military installation or business enterprise).
- B. Is employed at a company where the employer has made a general announcement that the company or location will close within 180 days. A general announcement may include media coverage, filing of a WARN with the State, corporate written notice of intent to close within 180 days (written notice includes email communication, employer website and/or social media postings).

Self-Employed and Business Closed

The Applicant must meet the following requirement:

- A. Was self-employed (including employment as a farmer, rancher, fisherman, or an independent contractor or consultant not technically an employee of a firm or agency) but is unemployed as a result of general economic conditions in the community in which the individual resides or because of natural disasters.

Additional Guidance – Self Employed and Business Closed

To assist an Applicant in determining if they meet this definition, consider the following.

- A. A person is self-employed when they meet one of the following conditions:
- Files taxes as self-employed for their business on their personal taxes.
 - Is considered an independent contractor by the business.
 - Meets all the following criteria:
 - Is not required by the business to complete an IRS W-4 form.
 - Is not required to pay federal income tax or FICA payments from their paycheck(s).
 - Liability or workers' compensation insurance for the individual is not paid by the business.
 - Creates or provides the products or services they sell or sets the price for the products or services they sell.
 - Is responsible for the business expenses and losses.
 - Receives profits from the business.
- B. Economic condition is defined as the present situation in the overall economy of the area where the individual resides. When a local economy contracts or is weakened it may impact self-employed individuals. Examples include recession, impacts of pandemic, impacts of major employers that support a high percent of employment and local purchasing power, such as:
- Failure of one or more businesses to which the self-employed individual supplied a substantial portion of products or services.
 - Failure of one or more businesses from which the self-employed individual obtained substantial proportion of products or services.
 - Substantial layoffs from, or a permanent closure of, one or more plants or facilities that support a significant portion of the local economy.
 - The unemployment rate for the county exceeds the State overall unemployment rate.
 - Depressed prices or markets for articles produced by the self-employed individual.

Displaced Homemaker

The Applicant must meet *one of the following* requirements:

- A. The Applicant has been providing unpaid services to their family in the home, and has been dependent on the income of another family member but is no longer supported by that income and is unemployed or underemployed and experiencing difficulty in obtaining or upgrading employment.
- B. The Applicant has been providing unpaid services to their family in the home and is the dependent spouse of a member of the Armed Forces on active duty and whose family income is significantly reduced because of a deployment, a call or order to active duty, a permanent change of station or the service-connected death or disability of the service member. The Applicant is unemployed or underemployed and is experiencing difficulty in obtaining or upgrading employment.

Additional Guidance – Underemployed

Underemployed is defined as any one of the following applying to the Applicant's situation:

- The Applicant is employed less than full-time and is seeking full-time employment.
- The Applicant is employed in a position that is inadequate with respect to their skills and training.
- The Applicant is employed but their family annual income does not exceed the higher level of the poverty line or 70 percent of the LLSIL.
- The Applicant is employed, but their current job's earnings are not sufficient compared to their previous job's earnings from their previous employment.

Military Spouse

The Applicant must *meet one of the following* requirements:

- A. The Applicant is the spouse of a member of the Armed Forces on active duty and has experienced a loss of employment as a direct result of relocation to accommodate a permanent change in duty station of the Armed Forces member.
- B. The Applicant is the spouse of a member of the Armed Forces on active duty and is unemployed or underemployed and having trouble in obtaining or upgrading employment. Refer to Additional Guidance – Underemployed.

Separating Service Member

The Applicant is a member of the Armed Forces who is separating from service to enter or re-enter the civilian labor force (being discharged). *Documentation with a DD-214 is required.*

Eligibility Determination

For WIOA Adult, eligibility determination is validated based on I-Trac data entry of birthdate and selective service. For WIOA Dislocated Worker, eligibility determination is based on data entry of birthdate, selective service and answers to dislocated worker types and appropriate documentation.

Eligibility Documentation

Following are the data elements which require documentation for eligibility determination, and a list of acceptable documents. Where Customer Attestation is the allowable source, the signed WSPM Application will be the documentation of the attestation. This will be reflected in I-Trac as "Signed Application."

For ease of participant co-enrollment across local workforce areas in Oregon, Worksystems will accept eligibility determination and documentation of any other Oregon local area contracted service provider. The liability for eligibility will remain with the first contracted Service Provider making the current, open enrollment eligibility determination.

If documentation cannot be provided as outlined within this policy, the Applicant may not be enrolled. However, Applicants may continue to engage in Self-Directed Services through My WorkSource.

Birth Date Documentation

One of these allowable documents is required, and must reflect a birth date that supports the information provided by the Applicant and aligns with their age at registration:

Baptismal Record	Public Assistance Benefits Letter or Crossmatch
Birth Certificate or Hospital Record of Birth	Record of incarceration, hospitalization, or institutionalization
DD-214 Military Separation Record	School Records or School ID Card
Driver's License	Selective Service Registration Acknowledgement Letter
Family Bible	Selective Service Registration Card
Government Issued Photo ID	Tribal ID Card
Passport	Signed Application*
Note: Applicant attestation documented with the signed Application may only be used when the Applicant does not have one of the allowable birthdate validation documents available.	

Dislocated Worker Documentation

The Applicant's attestation of the qualifying dislocation date is accepted, except for Military Separation. The Applicant's signature on the application is their attestation. Where the qualifying dislocation is based on a military person's separation from service, the DD-214 is required for documentation.

Selective Service Registration Requirements

An Applicant who is required to register for Selective Service must do so to be eligible to be enrolled.

Required to Register (All elements must be true)	Not Required/Exempt from Registering (Any one of the elements must be true)
1. Sex-assigned male at birth 2. US Citizen OR immigrant residing in the US between the ages of 18 and 25 3. Age 18 or older 4. Born on or after January 1, 1960	1. Sex-assigned female at birth 2. Born before 1960 3. Under the age of 18 4. A seasonal agricultural worker on a H-2A visa 5. A lawful non-immigrant on a current non-immigrant visa 6. Was incarcerated / hospitalized / institutionalized continuously between 18th and 26th birthdays 7. Was not living in the United States between 18th and 26th birthdays 8. Was on active US Military, Coast Guard duty or a student in an Officer Procurement Program continuously between 18th and 26th birthdays

Selective Service Registration Documentation

Documentation Types are defined by the requirement to register and whether the Applicant registered or did not register for the Selective Service. All documents must be uploaded to I-Trac.

IF Requirement is	AND Registration Status is	Then Documentation Types must be one of the following
Required	Registered	- Download the Selective Service Registration Acknowledgement Letter from https://www.sss.gov/verify/ - Selective Service Registration Card - Stamped Post Office Receipt of Registration
	Not Registered: Applicant was unaware of the requirement to register and is now age 26 or older.	- Request for Status Information Letter & Supporting Documentation - Selective Service Status Information Letter
	Not Registered: Applicant willingly and lawfully chose not to register.	No document and Applicant is not eligible.
Not Required/Exempt	Not Required to Register	- Signed Application (Age/Sex at Birth) - DD-214 Military Separation Record - Immigrant/Non-Immigrant Allowable Documents (refer to Appendix 1) - Records of Incarceration/ Hospitalization/ Institutionalization

Additional Selective Service Registration Notes

Incarceration/Hospitalization/Institutionalization

Applicants who were required to register but did not and can provide documentation that they were incarcerated, hospitalized and/or institutionalized from their 18th birthday to their 26th birthday are exempt from registration.

Military Service

If the Applicant was in the US Military, Coast Guard or Officer Training between their 18th and 26th birthday they are not required to register and their DD-214 Military Separation Record is the documentation.

Required to Register and Did Not

Applicants who are required to be registered, who are over age 26, and cannot document that they are registered through one of the means listed above must complete the Selective Service System's [Request for Status Information Letter](#) and attach copies of the documentation required for their reason for non-registration.

Where the request is completed and not yet submitted – A copy of the letter and supporting documents is to be provided to WorkSource, and a WIOA Contractor Program Manager must review it to determine that the Applicant has established by a preponderance of the evidence that the failure to register was not knowing and willful. If this determination is made the Request for Status Information Letter and documents are to be filed with all other eligibility documentation with the WIOA Program Manager approval signature, and the choice "Request for Status Information Letter & Support Documentation" selection in I-Trac is to be used.

The Applicant should be instructed to submit the Letter and documents as directed on the form for a formal determination by the Selective Service System. Note: It is not required that staff follow-up to assure the submission occurs nor is it required that the Selective Service System response be returned and filed. The WIOA Contractor Program Manager is authorized to make the determination at the time of WIOA documentation.

Where the request has been submitted and the Selective Service response received – If the Applicant already completed the Status Information Letter Request process with the Selective Service and has their Status Information Letter determination returned from Selective Service which says that they are found to be exempt from the requirement, a copy of the Response Letter is to be maintained as documentation and “Selective Service Status Information Letter (returned from Selective Service)” selection in I-Trac is to be used.

Applicants under the age of 18

All Applicants who are under age 18 when they begin participation in WIOA services who are sex assigned male at birth and who are not exempt must register for Selective Service within 30 days of their 18th birthday (i.e., 30 days before or 30 days after their birthday); if they do not register, they must be exited from all program services.

Participant Enrollment

Work Authorization

Work authorization verification must be completed prior to providing any of the following WSPM services: Basic Career, Individualized Career, Secondary Education, Training and Work Based Training. As Service Providers conduct verification of work authorization, they must ensure they comply with the nondiscrimination provisions at Section 188 of WIOA and its implementing regulations at 29 C.F.R. part 38. To ensure equal treatment, all Applicants must provide documentation of authorization to work in the United States. To verify that the Applicant is authorized to work within the United States, applicants must present documentation to staff that is equivalent to the [Federal Form I-9 requirements](#). Refer to the [US Citizenship and Immigration Services website, *uscis.gov*](#), for guidance. A copy of the document(s) is required to be uploaded to the I-Trac record.

Note: The documents on *List A* show both identity and work authorization. Applicants presenting an acceptable *List A* document should not be asked to present any other document.

The *List B* document only verifies identity through a picture that matches what the person looks like (if a picture is provided on the *List B* document) and/or that the name on the *List B* document is exactly the same as what is listed on the *List C* document. Applicants who choose to present a *List B* document must also present a document from *List C*.

Additional guidance on work authorization documents can be found in this link: [Form I-9 Acceptable Documents | USCIS](#)

Documentation is completed in the *Work Authorization Control* on the *Documentation Tab* in the WorkSource record. There are two classifications of work authorization documents in I-Trac – Permanent and Temporary.

- Permanent: Individuals who are authorized to work in the U.S. indefinitely without the need for periodic renewal or reverification. This status is typically held by:
 - U.S. citizens
 - Noncitizen nationals
 - Lawful permanent residents (Green Card holders)

According to federal guidance, individuals with permanent work authorization **DO NOT** require reverification of their work authorization—even when their document(s) (e.g., U.S. passport, Green Card) expire.

- **Temporary:** Individuals authorized to work in the U.S. for a limited time. This status is typically held by individuals who are not U.S. citizens or lawful permanent residents and who qualify under specific visa categories or programs.

For participants with a temporary work authorization document, you must view that participant's document every 90 days during their participation in In-Program and Follow-Up services for as long as their documentation remains temporary with an expiration date. Every 90 days you must ask the participant to show their work authorization documentation and confirm in I-Trac that the expiration date and document(s) entered in I-Trac matches the document(s) shown. You must also review work authorization document(s) with a participant once the document(s) used is expiring.

Required Disclosures

Provide and discuss the social security number (SSN) disclosure and the grievance and equal opportunity rights disclosure to ensure the Applicant understands their rights. The Applicant will acknowledge receipt of these disclosures when they sign the WSPM Application. No copies of the forms need be maintained in the Applicant file.

Social Security Number (SSN) Disclosure

A participant's SSN is required for their inclusion in some performance cohorts. The collection of an Applicant's social security number is not required for program eligibility purposes and providers may not deny services if an Applicant is eligible for WSPM services and chooses not to disclose their number. Applicants must be provided the SSN Disclosure (Standard SSN April 2025) that describes how their SSN will be used and the program's commitment to confidentiality. Where the Applicant agrees to the use of their SSN for reporting purposes, the indication is noted through I-Trac on the WSPM Application for services and the consent is the Applicants' signature on the Application.

Equal Opportunity (EO)/Grievance Disclosure

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

Enrolled Participant

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

Note: Applicants under the age of 18, Contractor staff must conduct due diligence to obtain parent/guardian signature for enrollment. Where a parent/guardian is absent, an Applicant under the age of 18 may be enrolled without parent/guardian signature. Once confirmed that a parent/guardian is absent, the participant may sign the Application in place of a parent/guardian with a case note entered in I-Trac by the Career Coach to document this.

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

Program Design and Service Delivery

There are two categories of WSPM services – In Program services and Follow-Up services.

In Program Services

Self-Directed/Informational Services

Services that provide readily available information to the public that do not require an assessment by a staff member of eligibility or fit for the program or an assessment of the individual's skills, education, or career objectives. Services include but are not limited to MyWorkSource, labor exchange information, information sessions, outreach and orientation to services available through the workforce system and WSPM workshops categorized as self-directed services. Self-Directed services do not require WIOA eligibility and registration be completed and do not extend the Participation Date.

Basic Career Services

Services which are universally accessible and are made available to all individuals seeking employment and Training services in the WorkSource Center. Generally, these services involve less staff time and involvement and include but are not limited to: initial assessment of skill levels, including literacy, numeracy and English language proficiency as well as aptitudes, abilities and support service needs; career exploration; workforce information on programs and services; and program referrals. Career Coaching, Job Search Assistance and Job Placement are the Basic Career Services delivered through WSPM and tracked and reported through I-Trac. Basic Career services require WIOA eligibility determination and registration be completed before the service can be provided.

Individualized Career Services

Services determined to be appropriate for the participant by a WSPM staff for the participant to obtain or retain employment. These services involve significant staff time and are customized to the individual's need. Individualized Career Services include but are not limited to: Comprehensive and specialized assessments; development of an individual training and employment plan; ABE, ESL and GED classes, Work Experience; Workforce Preparation and Pre-Apprenticeship programs. Individualized career services require completed WIOA eligibility determination and registration before the service can be provided.

Training Services

Please refer to the *Training, Education and Employment Skills* section of this policy for detailed information on available Training services through WSPM.

Work Based Training Services

Please refer to the *Work Based Training* section of this policy for detailed information on available Work Based Training services through WSPM.

Priority of Service Documentation

Several characteristic types provide WIOA Adult participants with priority of service consideration for Individualized Career or Training services when that status can be documented as outlined below. Where two people are candidates for the same Individualized Career or Training service and resources are limited, the priority will be given to the person from a priority population. Lack of documentation does not preclude Applicants from being enrolled and receiving services but does eliminate the priority of service benefit. Service Providers must apply priority in the following order:

Veteran and Eligible Spouse Status

To apply priority of service for Veteran status one of these allowable documents is required:

DD-214 Military Separation Record
Veteran Affairs Letter
Veteran's Crossmatch

Low Income

Documentation is through the signed Application as customer attestation. Refer to Addendum B below for additional information.

Public Assistance

One of these allowable documents is required:

Public Assistance Type	Allowable Documentation Types
Exhausting TANF (within 2 years)	Public Assistance Benefits Letter (TANF) Referral from TANF Public Assistance Crossmatch
General Assistance (State or Local Government)	Public Assistance Check copy Public Assistance Medical Card showing status Public Assistance Benefits Letter (reflecting type) Public Assistance Crossmatch
Refugee Cash Assistance	Public Assistance Check copy Public Assistance Medical Card showing status Public Assistance Benefits Letter (reflecting type) Public Assistance Crossmatch
Supplemental Nutrition Assistance Program (SNAP)	Public Assistance Benefits Letter (SNAP) Referral from SNAP Public Assistance Crossmatch
Social Security Disability Insurance (SSDI) (Received in the Past Six Months)	Public Assistance Benefits Letter (SSI/SSDI) Referral from Social Security Administration Crossmatch with Social Security Administration database
Supplemental Security Income (SSI) (Received in the Past Six Months)	Public Assistance Benefits Letter (SSI/SSDI) Referral from Social Security Administration Crossmatch with Social Security Administration database
TANF (Received in the Past Six Months)	Public Assistance Benefits Letter (TANF) Referral from TANF Public Assistance Crossmatch

Basic Skills Deficient

The Basic Skills Deficient documentation is staff assessment. This is documented in I-Trac with the assessment selection made by staff in the Basic Skills control. Basic Skills Deficient is defined as:

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. This may be determined by staff during the enrollment process while working with the Applicant when at least one of the following elements are observed (and therefore assessed):

- **Adult Education:** Is enrolled in a Title II Adult Education and Family Literacy Act program, this also includes enrollment in English as a Second Language (ESL) class.

- **Limited English Skills:** Determined to be limited English skills proficient through staff-engagement and observation.
- **Staff Observation:** Staff make observations of deficient functioning in completing forms, assisting in the development of a service strategy, or behaviors in group discussion settings.
- **GPA:** Information (in writing or through discussion with the Applicant) that an educational institution the Applicant engages or engaged with determined them to have a GPA at D or below within the previous six months.
- **Special Education:** Qualifies for Special Education services or has an Individual Education Program (IEP) plan.
- Applicant is co-enrolled in another Portland Metro program or local workforce area where that Contractor made the Basic Skills deficient determination.

In Program Service Definitions

1:1 Individual Training Plan Development

(Individualized Career Service)

A session with staff where a plan for skill attainment required to secure employment is developed or modified. The plan is a document that identifies:

- Employment goals and objectives and the combination of services that can assist the participant in reaching them.
- Planned Training opportunities, education and/or skill development, including identification of the responsible parties.
- Support service payments and other planned activities or resources needed to accomplish the employment goals, including identification of the responsible parties.

Individual Training Plans are to be reviewed with the participant and updated on a regular basis to reflect changes in goals, barriers or service needs.

Adult Basic Education

(Individualized Career Service)

Adult Basic Education (ABE) is classroom instruction with structured, formal written curriculum designed to systematically address a basic skill deficiency. Classes may be self-paced with individualized instruction. The length of instruction depends on student needs. ABE must be identified in a participant's service plan, and lead to Training or employment. Student progress is monitored, and testing is done to measure student progress. Utilize the Support Services payment type of Books and Fees for the payment of ABE instruction.

Career Coaching

(Basic Career Service)

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

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

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

English as a Second Language Instruction

(Individualized Career Service)

Structured, formal written basic skills curriculum designed to improve an individual’s understanding and use of the English language. Instruction is provided by an individual with specialized education or training in the delivery of English as a Second Language (ESL) instruction. The instruction should be identified in the participant’s service plan and lead to Training or employment.

General Equivalency Degree Instruction

(Individualized Career Service)

Structured and formal basic skills curriculum designed to address basic skills deficiencies and lead to passage of General Equivalency Degree (GED) tests and the award of a GED credential, which is commonly considered equivalent to a high school diploma. Classes may be self-paced with individualized instruction. The length of instruction depends upon the student’s needs. Individualized electronic instruction through computer-based systems may be a delivery system but it must include regular access to, and assistance from, instructors. Instruction must be part of the participant’s service plan and lead to Training or employment. Student progress is monitored, and testing is done to measure student progress. Utilize the Support Services payment type of Books and Fees for the payment of GED instruction.

Job Search Assistance

(Basic Career Service)

Coaching to or teaching strategies which can be used to increase job search effectiveness. Assistance may include a variety of strategies for conducting on-line job searches, networking, and the role of resumes, cover letters, and interviews in a successful job search. Service can be provided one-on-one or in a group setting.

Workshops

(Basic Career, Individualized Career or Self-Directed/Informational Service)

Topics presented in a group learning environment – either in-person or virtual – designed to assist participants in developing the job search or basic skills necessary to be competitive in the labor market. Workshops may be categorized as either Self-Directed/Informational, Basic Career Service or Individualized Career Service. When categorized as either a Basic Career Service or Individualized Career Service, WIOA enrollment is required.

Orientations

The workshops are designed to provide information to participants about specific WSPM programs and activities that require prerequisite work by participants to access. Most Orientation workshops are categorized as a Self-Directed/Informational service as they do not include an assessment of eligibility or fit for a program.

Standard Workshops

Standard workshops are delivered in every Center using WSPM curriculum and following guidelines for frequency, prerequisites, and outcome goals. Standard Workshops include Resume Development, Basic Computer Skills, Job Search, Interviewing Skills, Networking/Social Media and Interpersonal Skills.

Supplemental Workshops

Designed and facilitated by each WorkSource Center to meet the specific needs of their participant base. Supplemental Workshops must be approved by Worksystems before being finalized and offered in the Center and may be categorized as Informational, Basic or Individualized Career Services depending on the content and structure.

Training, Education and Employment Skills Services

There are four categories of Training, Education and Employment Skills services offered through WSPM – Occupational Skills Training, Pre-Apprenticeship Training Programs, Pre-Requisite Training and Workforce Preparation services.

Occupational Skills Training

Occupational Skills Training is an organized program of study that provides specific vocational skills that lead to proficiency in performing actual tasks and technical functions required by certain occupational fields at entry, intermediate or advanced levels. Occupational Skills Training must:

- Be on the Oregon, Washington, Idaho, or Utah State ETPL if utilizing WIOA funds (defined below).
- Be instructor-led in either an in-person or virtual format.
- Be outcome-oriented and focused on an occupational goal specified in the participant's Training Plan. The occupational goals must be on the Portland Metro area Target Occupation List (see below for definition of this list).
- Be of sufficient duration to impart the skills needed to meet the occupational goal.
- Lead to the attainment of a recognized, US Department of Labor-defined Credential.

Training may be offered through a school or Training organization on a per-student basis or offered through a cohort agreement with Worksystems. A Training cohort is defined as one group of participants enrolled in and attending the same Training sessions together; additionally, the cohort Training must have been procured for following Worksystems' procurement policy.

Prerequisite Training

Any class or Training that is required by the Training provider prior to enrollment in a Training program that is represented on a State ETPL. This excludes activities defined under Workforce Preparation. The Training program on the State ETPL must indicate the prerequisite course is required for entry into the Training program.

Pre-Apprenticeship Training Program

A program designed to prepare participants to enter and succeed in a Registered Apprenticeship Program. Pre-Apprenticeship Training Programs are Oregon BOLI registered and should have at least one, if not more, documented partnership(s) with a Registered Apprenticeship Program that will assist in placing participants who complete the Pre-Apprenticeship Training Program into their Registered Apprenticeship program. Pre-Apprenticeship Training Programs are not required to be on a State ETPL and do not place the participant in the denominator for either WIOA Measurable Skill Gains or Credential performance.

If a Pre-Apprenticeship Training Program service also includes elements of Occupational Skills Training, the service must be entered in I-Trac as both a Pre-Apprenticeship Training service and an Occupational Skills Training service. When entered as an Occupational Skills Training service the participant will fall in the denominator of the WIOA Credential and Measurable Skills Gain performance.

Workforce Preparation

Activities, programs or services designed to help an individual acquire any combination of the skills necessary for successful transition into and completion of Post-Secondary education or Training, or successfully entering employment. Activities may include but are not limited to computer literacy, forklift operator, flagger, OLCC certificate, first-aid required for an employment position, food handlers' certificate, OSHA health and safety certifications and other occupational skills education leading to non-Department of Labor (DOL) defined credentialed certifications that are required for entry level, health or safety employment requirements.

Requirements to Start Training Service

Participants who want to receive Training, Education and Employment Skills services through WSPM must complete the following requirements:

- WorkSource Registration and Enrollment.
- Consultation with WorkSource training/skills team staff.
- Completion of a Prosperity Planner Budget in I-Trac.
- Individual Training Account (ITA) or Cohort Training Application (as appropriate, not required for Workforce Preparation services).

Training Start Definition

The start date in a Training program is considered the first day that a participant attends the Training.

Training Completer Definition

A participant who completes a planned program of Training with a “complete” or “pass” designation from the school. Training completion must be reflected in the I-Trac record with a service end date and status of Completed. The Training end date is the last date the participant attended any service provided as part of that Training program.

Individual Training Account (ITA)

A financial obligation by a WSPM Center to support classroom-based Training or instruction in a program that is on the Oregon, Washington, Idaho or Utah State ETPL. ITAs may include the costs of tuition, related course fees (e.g., school, lab) and books required for the Training program. Refer to the *Individual Training Account WDB Policy* for additional details.

Individual Training Account (ITA) Documentation

All ITA Applications must be reviewed by the WorkSource Center’s Training Review Team, and a Training Review Form must be completed and saved in the participant file.

State Eligible Training Provider List

The statewide roster of Training programs and providers specifically certified by the State to meet the requirements of the WIOA. All Training funded with an ITA utilizing WIOA funds must be on the Oregon, Washington, Idaho or Utah State ETPL and be related to an occupation on the Portland Metro Target Occupation List.

Portland Metro Target Occupation List

To ensure that Portland Metro Training investments have maximum impact for both job seekers and the local area’s employers, Worksystems establishes a list of target occupations that forecast growth and opportunity and that are aligned with Worksystems’ target sectors of clean energy, construction, early childhood education, healthcare and manufacturing. The Portland Metro area Target Occupation List focuses on investments and Training services on these identified occupations. As a result, Training services will be directly linked to in-demand occupations that provide a career path leading toward self-sufficiency. Target occupations will be identified as outlined below.

Identifying Target Occupations

Occupations must meet the following criteria to qualify as targeted occupations for investment.

- \$21/hour Median Wage or above.
- Two or fewer years of post-secondary education.
- Anticipated growth over the next 10 years.
- 200+ jobs in the region.

From time to time there may be occupations that meet the criteria but are not included on the Portland Metro Target Occupations List based on relevant factors such as gathered industry intelligence. Target occupations will be reviewed and adjusted as necessary, based on changes in projected supply and demand and feedback from regional employers, Oregon Employment Department staff and partner organization staff. Exceptions may be granted by Worksystems to fund an ITA for Trainings on the State ETPL that are not related to occupations on the Portland Metro Target Occupation List on a case-by-case basis. Worksystems will take into account the individual participant’s work experience, career goals, and employment opportunities related to the Training when determining whether to make an exception. Exception requests must be submitted to the Worksystems Contract Manager via email for approval.

Pell Grant Requirements

If the Training program is Pell Grant-eligible, the participant must apply for the Pell Grant. If awarded, the Pell Grant may be applied toward all Pell-eligible costs outlined in the training budget and may be coordinated with the approved WIOA funding. Each grant may pay for their grant-eligible costs.

When PELL is awarded, it is not required to immediately recapture WSPM training funds paid out and subsequently covered by a Pell Grant. Instead, the school may award the PELL grant to the participant to use to pay for any other PELL eligible expenses. In these cases, the PELL must be considered in any participant support service requests as there may be an overlap between the PELL support services and WSPM support services.

After the Pell Grant has been applied to all Pell-eligible costs, if there are funds remaining those excess funds must be applied to the WIOA-paid costs (tuition, fees, books), reducing the WIOA award.

Work Based Training

There are three categories of Work Based Training – On-the-Job Training, Registered Apprenticeship and Work Experience.

On-The-Job Training

On-the-Job Training (OJT) assists businesses in training skilled, productive workers. OJT's may be used to help train newly hired employees and employees hired to regular permanent employment through a staffing service relationship who need additional training to meet the employer's minimum standards.

The OJT is an agreement between the WorkSource program and an employer who agrees to act as a training provider. The OJT is a hire-first program; the trainee is hired as an employee of the company, a training plan is developed to outline the skills the trainee is lacking to be proficient in the position minimum requirements, and the employer agrees to provide the necessary training on the job to bring the trainee up to entry-level standards for the position. The employer is compensated for the extraordinary costs and decreased productivity associated with training the participant. Refer to *OJT Policy* for additional details.

PDX Metro Works

There are two Work Based Training services offered through PDX Metro Works: Work Experience (WEX) services and Paid Work Opportunities (PWO).

A WEX service provides participants with career exposure, opportunities to practice workplace skills and work ethic and, in some instances, provide a re-connection to the workforce. WEX services are intended to prepare a participant for future, unsubsidized employment, by matching participants with worksites committed to providing supportive supervision and mentorship in positions aligning with a participant's short- or long-term career goals. Participants with very limited work experience, making career changes, or with limited to no work experience in the target occupation are prioritized for services.

A PWO service is intended to match a participating worksite with a work-ready participant who is interested in and ready for placement in an entry-level employment position within a target industry.

Both a WEX and a PWO are planned, structured short-term experiences that takes place in a business worksite and involves duties that are defined by a written, signed Training Agreement with the worksite. The Agreement outlines the expectations and responsibilities of all parties and specifies the placement position, responsibilities, duties and maximum hours allowed. A worksite may be in the private for-profit, non-profit, or public sector.



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WEX and PWO placements are an employer-employee relationship with the participant and a wage is paid. The Internal Revenue Service Fair Labor Standards Act applies. All participants must complete all Employer of Record- required documents and processes, including but not limited to: W4 (both Federal and State) and Form I-9 and Verification.

Registered Apprenticeship

A Work Based Training program registered through the DOL and Oregon Bureau of Labor and Industries (BOLI) that connects job seekers looking to learn new skills with employers looking for qualified workers. Employers, employer associations and joint labor-management organizations, known collectively as "sponsors," provide apprentices with paid on-the-job learning and related academic instruction that reflects industry needs. The goal of the instruction is to provide workers with advanced skillsets that meet the specific needs of their employers. The apprenticeship program must be on the Oregon ETPL.

Follow-Up Services

Follow-Up Services are provided upon a participant's completion of their service strategy and are intended to help the participant be successful in employment. Follow-Up services are available for up to 12 months following program completion. Career Coaching, Job Search Assistance and Referred to Employment are the Follow-Up Services in I-Trac.

Follow-up services must be offered and made available to all participants when a participant is Exited to employment placement. Follow-Up services must also be made available to any participant following Exit from the program unless the participant declines to receive them, or the participant cannot be located or contacted. WIOA funded Support Service payments and Training services are not allowed as Follow-Up in the WorkSource Adult or DW I-Trac record however discretionary grant funding may pay for Support Services and Training while a participant is in Follow-Up in their WorkSource Adult or DW record. Contacting a participant to make appointments and secure performance-related data and information does not constitute Follow-Up services and should not be reported as such.

The types of follow-up services provided, and the duration, must be determined based on the needs of the participant; therefore, the type and intensity of services may differ for each participant.