



WORKFORCE INVESTMENT AND OPPORTUNITY ACT (WIOA) LOCAL POLICIES AND PROCEDURES MANUAL



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CHAPTER 1. INTRODUCTION

A. PURPOSE

The purpose of this manual is to provide policy guidance and interpretation of Federal and State workforce laws, and to assure consistency in operations among WIOA program operators and employees. This manual is intended for use in conjunction with Federal and State laws and regulations.

B. HISTORY

The Workforce Innovation and Opportunity Act (WIOA) was passed by Congress in 2014 as a reform to federal job training programs. The Act created a new comprehensive workforce investment system. The system created by the Workforce Innovation Opportunity Act is intended to be customer focused. It is intended to assist job seekers in accessing the tools that they need to manage their careers through information and high-quality services. WIOA is also intended to assist U.S. companies in finding skilled workers.

WIOA was designed to permit communities and states to build a workforce investment system that recognizes individual choices, is reflective of local conditions and results in increased employment opportunities, skills, earnings and job retention of participants.

C. CAREERSOURCE ESCAROSA'S COMMITMENT TO CUSTOMERS

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1. Vision Statement - Is a “to be” statement for the system. A simple, clear description of our compelling aspiration. The brand vision is intentionally aspirational; it is high-reaching and reflective of a goal not only for the system but for everyone it touches.

2. Mission Statement - Is a succinct description of the work we will do to achieve the vision. This is what we get up every day thinking about. It directly informs our structure, staffing and design of our operations and is the most visible to the market.

3. Statement of Values - Are the unswerving core beliefs and spiritual foundation of the system. These values express the things about the Florida Workforce System brand that won't change over time; they are the bedrock and are embraced by the entire system and everyone doing business with it.

a. Business-Driven: We believe Florida employers – the state's job creators – are essential to our overall success in providing effective, market-relevant workforce solutions that drive economic growth and sustainability.

b. Continuous Improvement: Driven by our commitment to excellence, we respond to changing market dynamics. We continually strive to improve our performance to better anticipate and address the talent needs of employers and the employment and skills needs of job seekers and workers. We identify, measure and replicate success.

c. Integrity: We fulfill our mission with honesty and accountability and strive in every decision and action to earn and protect the public trust.

- d. Talent Focus: We believe in the power of talent to advance every enterprise and open the door to life-enhancing economic opportunities for individuals, businesses and communities. Our commitment is to make talent Florida's key competitive asset.
- e. Purpose-Driven: Our work is meaningful and through it, we can inspire hope, achievement and economic prosperity in the lives of the customers we serve.

D. CAREER CENTERS

CareerSource Escarosa operates three One –Stop Career Centers in Escambia and Santa Rosa Counties.

1. One-Stop Career Center, Pensacola
6913 North 9th Avenue
Pensacola, FL 32504
Hours of operation: Monday - Friday, 7:30 am – 4:30 pm
2. One-Stop Career Center, Milton
5725 Highway 90
Milton, FL 32583
Hours of operation: Monday – Friday, 7:30 am – 4:30 pm
3. One-Stop Career Center, Century
Century Town Hall
7995 N. Century Blvd.
Hours of operation: Monday-Thursday, 7:30 am – 3:30 pm

E. WEBSITE

CareerSource Escarosa operates a website that provides comprehensive information regarding programs, services and other pertinent information for job seekers, employers,

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CareerSource Escarosa Board of Directors members and the public at large.

The website address is: www.careersourceescarosa.com

F. NONDISCRIMINATION AND ACCESSIBILITY

1. Equal Opportunity and Nondiscrimination

CareerSource Escarosa is an equal opportunity employer and program operator. Workforce Escarosa complies fully with WIOA Equal Opportunity and Nondiscrimination Regulations 29 CFR PRT 37 and Section 188 of the Workforce Innovation and Opportunity Act of 2014 which prohibits discrimination against all individuals on the basis of race, color, religion, sex, national origin, age, disability, political affiliation or belief, and against beneficiaries on the basis of either citizenship/status as a lawfully admitted immigrant authorized to work in the United States or participation in any WIOA Title 1B financially assisted program or activity.

2. Accessibility

All CareerSource Escarosa One-Stop Career Centers are accessible to persons with disabilities in accordance with the American's with Disabilities Act (ADA). In addition, CareerSource Escarosa publishes the Teletypewriter (TTY) and Telecommunication Device for the Deaf (TDD) phone numbers on all outreach and recruitment documents as well as CareerSource Escarosa's website. The One Stop Career Centers in Pensacola and Milton have Video Relay Systems (VRS) available. VRS allows hearing impaired customers to have instant access via camera and monitor, to an American Sign Language (ASL) interpreter.

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3. Disability Navigator

CareerSource Escarosa employs a Disability Program Navigator (DPN). The role of the DPN is to:

- a. Facilitate seamless and comprehensive services and universal access for individuals with disabilities within the One-Stop Centers.
- b. Serve as a resource to One-Stop Center staff, businesses and disability communities.
- c. Provide training on disability related topics and programs.
- d. Enhance the economic empowerment of individuals with disabilities.

G. STAFF QUALIFICATIONS

1. All front line One-Stop Career Center staff members are required to complete and pass Tier 1 Workforce Professional Certification Training within 6 months of their hire date. Tier 1 certification training is an online program provided by Dynamic Works. This program offers comprehensive training regarding workforce services which include:

- a. Career Development
- b. Customer Service
- c. Diversity
- d. General Helping Skills
- e. History and Structure of the Workforce Development System
- f. In-Depth Look at the Workforce Investment and Opportunity Act
- g. Interpersonal Skills
- h. Job Keeping Skills
- i. Job Preparation Skills
- j. Job Search Skills
- k. Labor Market Information

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- l. Program Management
- m. Technology
- n. National Workforce Professional Certification Exam

2. Tier 1 certification staff must complete a minimum of 15 hours of continuing training each year for subsequent years of their employment.

H. CAREER SERVICES TEGL 3-15

WIOA authorizes “career services” for adults and dislocated workers, rather than “core” and “intensive” services, as authorized by WIA. There are three types of “career services”: basic career services, individualized career services, and follow-up services. These services can be provided in any order; there is no sequence requirement for these services. Career services under this approach provide local areas and service providers with flexibility to target services to the needs of the customer.

The three categories of career services are defined as follows:

1. Basic Career Services – Basic career services must be made available to all individuals seeking services served in the one-stop delivery system, and include:
 - a. Determinations of whether the individual is eligible to receive assistance from the adult, dislocated worker, or youth programs;
 - b. Outreach, intake (including identification through the state’s Worker Profiling and Reemployment Services system of unemployment insurance (UI) claimants likely to exhaust benefits), and orientation to information and other services available through the one-stop delivery system;

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c. Initial assessment of skill levels including literacy, numeracy, and English language proficiency, as well as aptitudes, abilities (including skills gaps), and supportive service needs;

d. Labor exchange services, including—

e. Job search and placement assistance, and, when needed by an individual, career counseling, including-

f. Provisions of information on in-demand industry sectors and occupations (as defined in sec. 3(23) of WIOA); and,

g. Provisions of information on nontraditional employment (as defined in sec. 3(37) of WIOA);

h. Provision of referrals to and coordination of activities with other programs and services, including those within the one-stop delivery system and, when appropriate, other workforce development programs;

i. Provision of workforce and labor market employment statistics information, including the provision of accurate information relating to local, regional, and national labor market areas, including— Job vacancy listings in labor market areas; Information on job skills necessary to obtain the vacant jobs listed; and Information relating to local occupations in demand and the earnings, skill requirements, and opportunities for advancement for those jobs.

j. Provision of performance information and program cost information on eligible providers of training services by program and type of providers;

k. Provision of information about how the local area is performing on local performance accountability measures, as well as any additional performance information relating to the area's one-stop delivery system;

l. Provision of information relating to the availability of supportive services or assistance, and appropriate referrals to those services and assistance, including: child care; child support; medical or child health assistance available through the State's Medicaid program and Children's Health Insurance Program; benefits under the Supplemental Nutrition Assistance Program (SNAP); assistance through the earned income tax credit; housing counseling and assistance services sponsored through the U.S. Department of Housing and Urban Development (HUD) ¹; and assistance under a State program for Temporary Assistance for Needy Families (TANF), and other supportive services and transportation provided through that program;

m. Assistance in establishing eligibility for programs of financial aid assistance for training and education programs not provided under WIOA; and

n. Provision of information and assistance regarding filing claims under UI programs, including meaningful assistance to individuals seeking assistance in filing a claim.

2. Individual Career Services - If one-stop center staff determine that individualized career services are appropriate for an individual to obtain or retain employment, these services must be made available to the individual. These services must be available in all one-stop centers. One-stop center staff may use recent previous assessments by partner programs to determine

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if individualized career services would be appropriate. These services include:

- a. Comprehensive and specialized assessments of the skill levels and service needs of adults and dislocated workers, which may include— Diagnostic testing and use of other assessment tools; and In-depth interviewing and evaluation to identify employment barriers and appropriate employment goals;
- b. Development of an individual employment plan, to identify the employment goals, appropriate achievement objectives, and appropriate combination of services for the participant to achieve his or her employment goals, including the list of, and information about, eligible training providers;
- c. Group and/or individual counseling and mentoring;
- d. Career planning (e.g.) case management);
- e. Short-term pre-vocational services, including development of learning skills, communication skills, interviewing skills, punctuality, personal maintenance skills, and professional conduct to prepare individuals for unsubsidized employment or training, in some instances pre-apprenticeship programs may be considered as short-term pre-vocational services;
- f. Internships and work experiences that are linked to careers;
- g. Workforce preparation activities that help an individual acquire a combination of basic academic skills, critical thinking skills, digital literacy skills, and self-management skills, including competencies in utilizing resources, using information, working with others, understanding systems, and obtaining skills

necessary for successful transition into and completion of postsecondary education, or training, or employment;

h. Financial literacy services;

i. Out-of-area job search assistance and relocation assistance; and

j. English language acquisition and integrated education and training programs.

3. Follow-up Services - Follow-up services must be provided as appropriate for participants who are placed in unsubsidized employment, for up to 12 months after the first day of employment. Counseling about the work place is an appropriate type of follow-up service. Follow-up services do not extend the date of exit in performance reporting.

I. WIOA PROGRAMS

There are three WIOA program categories that an individual may be eligible for: Adult Program, Dislocated Worker Program and Youth Program. Information regarding eligibility and service delivery for these programs is provided in the chapters that follow.

CHAPTER 2. Customer Service and Flow

A. CUSTOMER SERVICE/RECEPTION

1. All visitors to CareerSource Escarosa's Career Centers report to a customer service/reception area.

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2. All customers are greeted and asked to sign-in using the computer kiosks or use the card reader to scan their card located at the reception points. The sign-in computers and scan cards track customer flow and basic customer information such as name, purpose for the customer's visit and the language spoken by the customer. This data is used to track customer volume in the various service areas, and allows CareerSource Escarosa to continually improve customer flow, customer service and staffing levels, based on customer usage of various services.

3. The customer service representative determines the purpose of the customer's visit, answers basic questions and directs customers to appropriate areas and services.

B. CUSTOMER SUPPORT

1. Job Seekers, who are visiting CareerSource Escarosa for the first time, are directed to the Customer Support area. Job seekers have the opportunity to register in the Employ Florida (EF). Customer Support staff are available to assist and answer questions regarding the EF registration process and ensure that registrations are entered correctly.

2. Customer Support staff provide first time visitors with a Directory of Job Seeker Services and a monthly Workshop calendar to familiarize new customers with One-Stop services.

3. Customers seeking information regarding Unemployment Insurance (UI) are also referred to the Customer Support area. Customer Support staff provide UI instructions and information to assist customers in filing Reemployment Assistance claims and answer basic Unemployment Insurance questions.

4. In addition, Customer Support staff provide EF password re-sets, job screening and referrals for job orders that require them.

C. RESOURCE ROOM

CareerSource Escarosa's Resource Room provides customers with computer, internet connectivity and print resources. Resource Advisors are available to answer questions and assist customers when needed. Resource Room Advisors also encourage customers to utilize other services such as computer skills, job search workshops, Veteran's services, etc. and will refer customers to the career counselor. In addition to computers, the Resource Room features fax machines, telephones and copiers to assist customers with their job search and career planning. The Resource Room offers accessible equipment for persons with disabilities.

A printed help guide is available in the Resource Room to assist customers in navigating through resources on the internet. Services and information that are accessible in the Resource Room include but are not limited to:

1. Information on job vacancies
2. Local in-demand occupation information
3. Labor market information
4. Information regarding training programs
5. Eligible training provider lists
6. Regional Workforce Board performance reports
7. Information on One-Stop partner agencies and local community services
8. Information on support service availability
9. Self-directed online and computer based assessments
10. Typing/keyboarding tests and other pre-employment tests

D. WORKSHOPS AND COMPUTER LAB ACTIVITIES

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The Career Centers' computer labs offer customers the opportunity to learn or improve their basic computer skills and software knowledge. The Computer Lab features Virtual Learning Center software which provides hands-on tutorial training at beginning, intermediate and advanced levels for software programs such as Microsoft Word, Excel, PowerPoint, GED Prep Classes, Ready to Work, eSkills and TABE testing.

CareerSource Escarosa provides several workshops to improve customer job searching skills and employability. All workshops are posted on the monthly calendars for the Pensacola and Milton Career Centers and are posted on CareerSource Escarosa's website. These workshops include, but are not limited to the following:

1. Employability skills
2. Resume writing
3. Employment Interviewing Techniques
4. Basic Computer Skills related to obtaining and maintaining employment
5. Navigating Employ Florida
6. Personal Budgeting
7. Typing Skills
8. Social Media & Networking for Job Seekers

CHAPTER 3. WORKFORCE INNOVATION AND OPPORTUNITY ACT (WIOA) ADULT AND DISLOCATED WORKER PROGRAMS

A. OUTREACH AND RECRUITMENT

CareerSource Escarosa is an equal opportunity employer. Auxiliary aids and services are available upon request to individuals with disabilities. TTY: (877) 889-5627 | TDD: (800) 955-8771. A Proud Partner of the American Job Center Network.

- Outreach and recruitment of potential Workforce Innovation and Opportunity Act (WIOA) Adults and Dislocated Workers may be accomplished through established and maintained relationships with human service organizations, community and faith-based organizations, educational institutions and local law enforcement agencies. In addition, outreach is accomplished through various marketing efforts which include: direct advertising, press/media releases, print materials such as brochures/flyers, participation in job fairs and social media platforms.
- Outreach and recruitment is coordinated with the Career Center's by various means. Career Center's front line staff are trained in the basics of WIOA so that they may identify, refer and provide information to customers regarding WIOA services. Career Center partner agency staff members receive basic information, training and periodic updates regarding available WIOA services so that referrals from partner agencies can occur in a seamless and timely manner.
- WIOA information is also presented at the Reemployment Services and Eligibility Assessment (RESEA) orientations. In addition, information regarding WIOA services is also displayed in the Career Centers and posted on the CareerSource Escarosa website.

B. CAREER COUNSELING SERVICES

1. The Career Counselor provides short-term counseling both individually and in a group setting. The career counselor also provides job search skill advice, helps customers navigate One-Stop services, critiques customer resumes and provides referrals to One-Stop programs or other community agencies as appropriate.

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2. The Career Counselor documents services provided through case notes in EF and/or inputs appropriate Wagner-Peyser services.

3. Customers may be referred to the career counselor from the One-Stop staff or self-referred (customers seeking assistance or advice).

C. INITIAL ASSESSMENT WITH CAREER ADVISOR

After completing the WIOA online questionnaire, the career advisor will schedule an initial meeting with the customer to assess the customer's needs and suitability for WIOA Training services. This appointment assesses the customer's interests, work history, career goals and barriers. Various assessment and screening tools are used including; interview(s), Interest Application and the Suitability Screening Assessment.

If training services are appropriate for the individual, a WIOA application is completed in Employ Florida and the appropriate recordable training service(s) are input in EF. The WIOA Career Advisor may also refer the individual to other community services as appropriate. Recordable training services and their related EF codes are as follows:

1. Initial Assessment (code 102)
2. Job Search Workshop (code 104)
3. Job Finding Club (code 105)
4. Attended Rapid Response (code 110)
5. Job Search/Placement Assistance including Career Counseling (code 125)
6. Testing background check as required by employer (code 131)

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D. TRAINING SERVICES ELIGIBILITY

Career Services are available to all customers. To register a customer in WIOA for Training Services, the customer must fall into one of two categories:

1. Adult Program – Individuals that are between the ages of 18-72 years of age who do not meet criteria for the Dislocated Worker program or WIOA Youth program.
2. Dislocated Worker – Unemployed and have lost their job through no fault of their own, or who have received a layoff notice and are unlikely to return to their previous occupation or industry.
3. Adults and Dislocated Workers who have received at least one Career service and who fall into one of the following categories may be eligible for WIOA training services:
 - a. Unemployed – currently without employment
 - b. Underemployed – employed at or below 200% of the Lower Living Standard Income Level (LLSIL), according to family size.
 - c. Needs assistance to retain employment – employed workers who are not economically self-sufficient or need services/training to retain their self-sufficient employment.
 - d. Employed but not economically self-sufficient- includes the following: Adults that are at or below 200% of LLSIL, according to family size. Employed workers, as are defined as learning at or below 200% of family of three (3) LLSIL.

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e. Local Priority of Services Policy - CareerSource Escarosa will apply a “most-in-need” policy when funding is determined to be limited. Priority will be given to those who are economically disadvantaged and are “at-risk of public assistance”. This shall be defined as family income, as determined by the household size, must be 150% or less of the federal poverty level as noted on the LLSIL and must have a child below 18 years of age in the home. CareerSource Escarosa always prioritizes veterans as first service priority in accordance with federal requirements.

E. INTAKE

1. If the customer has not obtained employment at a self-sufficient wage through participation in Career services, and could benefit from training services, the Career Advisor will refer the customer to the WIOA Intake Specialist for training services eligibility determination. The Intake Specialist will ensure that all general and program specific eligibility/suitability requirements are met, documented in EF and that all supporting documentation is in the individual's file.

2. The WIOA Intake Specialist will review or complete the following forms with the customer:

- a. CareerSource Escarosa Interest Application
- b. Suitability Screening/Assessment for Training Services
- c. Verification of Educational Background Form
- d. Verification of Household size
- e. Financial Statement Form
- f. Suitability Screening/Assessment for Services Form
- g. Statement of Purpose for Collecting Social Security Numbers
- h. WIOA Applicant Authorization to Request and/or Release Information
- i. Equal Employment is the Law

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- j. CareerSource Escarosa, Inc. Grievance/Complaint Hearing/Appeal Procedures
- k. Policy Statement on Sexual Harassment

3. Income and dislocation information may also be part of the training service eligibility process. The Source Verification Form (Exhibit 3-M) provides an overview of the required items needed to determine eligibility and source documentation used.

4. After the WIOA Intake Specialist determines the individual eligible for training services in EF, a file is completed, and the customer is referred to the WIOA Career Advisor.

F. TRAINING SERVICE DELIVERY

Customers may receive a variety of intensive services depending upon their individual needs.

1. WIOA Career Advisors will develop an Individual Employability Plan (IEP) in EF based upon a thorough assessment of the customer. The assessment used to develop the IEP is an independent, comprehensive evaluation of the customer, designed to identify information that is vital to the development of a service strategy, to set goals and objectives which culminate in gainful employment. Assessment tools used may include, interviews, formal vocational assessment tests and customer self-assessment. The IEP development process should evaluate the customers employment barriers, consider the customer's family situation, work history, education, occupational skills, financial resources and needs, supportive service needs, interests and aptitudes.

2. Assessment of the customers reading, math, language and spelling ability is achieved through administration of the Tests for Adult Basic Education (TABE).

3. Additional formal vocational assessment tests may be administered to the customer to assist the WIOA Career Advisor and the customer in developing the IEP. The One-Stop Career Center offers the eSkills Testing. The eSkills Testing validates over 900 assessments for the job seekers and employers. Assessments for clerical, technical, financial, medical and more. These tests are given on a computer for immediate results in specific areas.

4. If the customer has completed a comprehensive assessment with another agency, such as the Division of Vocational Rehabilitation, a secondary school district or post-secondary school, these alternate assessment results may be utilized. The alternate test instrument must be applicable and comparable to the WIOA testing instruments. A copy of all assessment results should be included in the WIOA customer's file.

5. The type and scope of intensive services provided to the WIOA customer is based upon the customer's assessed needs and ongoing progress during participation in the WIOA program.

6. The IEP should be revisited on a regular basis and amended as appropriate, when additional needs are identified, or goals are achieved. At a minimum, the IEP must be reviewed by the WIOA Advisor and customer once a year. Assessment is an on-going process. It should include an array of options for the customer from which the WIOA Advisor, together with the customer, makes informed decisions and select appropriate services, which will best enable the customer to seek and retain long-term self-sufficient employment.

7. The customer can continue to receive services until they secure suitable employment, or they may be referred to training services. Participants may also return after completion of training services to receive job search/placement assistance.

G. TRACKING SERVICES

Appropriate services that are provided to the WIOA customer should be input in EF. Training services and their related EF codes are as follows:

1. Individual Counseling (code 200)
2. Group Counseling (code 201)
3. Career Guidance/Planning (code 202)
4. Objective Assessment (code 203)
5. Interest and Aptitude Testing (code 204)
6. Develop Service Strategies – IEP (code 205)
7. Other Intensive Services Not Otherwise Classified (code 212)
8. Mentorship (code 213)
9. Short Term Pre-Vocational Services (code 215)
10. Out-of-Area Job Search Assistance (code 216)
11. Supportive Services-Relocation Assistance (code 217)
12. Internships (code 218)
13. Work Experience (code 219)
14. English as a Second Language (code 222)
15. Reading and/or Math Testing (code 226)

H. TRAINING ELIGIBILITY/SUITABILITY

Customers who are unable to secure/retain suitable employment through WIOA Career services may be appropriate for training services. WIOA training services are provided through a cooperative planning process between the WIOA customer and the WIOA Career Advisor. Customers have access to training provider information to assist them in

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making an informed training choice. Customers who are interested in training services must:

1. Have at least one Basic service documented in EF.
2. Have an assessed need for training service.
3. Choose a training program from the Eligible Training Provider List (ETPL).
4. Score at least 8.9 in reading, language and combined math areas of the TABE unless the training program does not have TABE requirements. If the customer has already been accepted into a training program, such as the nursing program that has higher acceptance requirements than 8.9, the test can be waived.
5. Complete the Free Application for Federal Student Aid (FAFSA) form (exceptions include individuals who possess a bachelor's degree, or a customer interested in a training program that is less than 9 months in length).
6. Lack and be unable to obtain sufficient financial assistance from other grants/resources to pay for training related expenses.
7. Meet Adult or Dislocated Worker Program Screening/Assessment Policies to determine Economic Self-Sufficiency.

I. FORM REQUIREMENTS FOR TRAINING SERVICE ENROLLMENT

Prior to enrolling the customer in training services, the following forms will be completed by the WIOA Career Advisor/and or customer:

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1. Interest Application
2. Adult OR Dislocated Worker Program Screening /Assessment Policy to determine Economic Self-Sufficiency Form
3. Verification of educational background
4. Verification of household size
5. Suitability Screening/Assessment for Training Form
6. Complete Individual Training Account (ITA) Form
7. Occupational Skills Training Agreement
8. Pell Form
9. School Information Release Authorization Form
10. Employment During Training Form
11. Financial Statement

J. CASE MANAGEMENT DURING TRAINING SERVICE PARTICIPATION

1. The WIOA Career Advisor assists and tracks the WIOA customer while they are attending training and assists the customer as necessary. Assistance may include counseling, encouragement and guidance, in addition to providing training related items. Tuition assistance, required books, training related items and support services are provided based upon assessed need.
2. Training services are provided through Individual Training Accounts (ITA). Each customer is provided with a maximum of \$3,500 per fiscal year to finance training services. ITA accounts are tracked by CareerSource Escarosa's accounting department.
3. ITA agreements are completed and signed by all approved training providers and program director.

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4. Individuals are required to maintain satisfactory attendance and progress during their training program to continue training services. The individual must also make, at minimum, monthly contact with their WIOA Career Advisor and provide copies of grades each semester or term. Certificates and other items used to document credentials must also be provided by the individual.

K. TRACKING TRAINING SERVICES

The appropriate training service(s) provided to the WIOA customer should be tracked and entered in EF:

1. Occupational Skills Training (code: 300)
2. On-the-Job Training (code: 301)
3. Entrepreneurial Training (code: 302)
4. Customized Training (code: 304)
5. Adult Literacy, Basic Skills, GED Prep (code: 315)
6. Private Sector Training (code: 323)
7. Workplace Training and Cooperative Education (code: 324)
8. Adult Education with Occupational Skills Training –Approved Provider (ITA) (code: 324)
9. Support Service-Needs Related Payments (code: 326)
10. Occupational Skills Training-Non-Approved Provider (No ITA) (code: 328)
11. 00PN Training (Waiver 6) (code: 390)

L. CASE CLOSURES

1. After the WIOA customer obtains employment or no longer needs WIOA services, the WIOA Career Advisor will close all services and create a case closure in EF.

2. If a credential is obtained, it can be identified and input in EF when closing the training service or during case closure.

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Documentation must be on file to support credential attainment date.

3. If the customer's case closes due to employment, the Career Advisor will use employment verification documentation if possible.

4. If the customer's case meets one of the global exclusions, then appropriate documentation must be in the file to support a neutral closure. To be excluded from performance, the event must be expected to last 90 days or more. Global exclusions (neutral closures) include:

- a. Persons institutionalized (exceptions are detained Responsible Reintegration of Youthful Offenders and disabled individuals residing in institutions).
- b. Persons unable to continue due to health/medical or family care reasons.
- c. Deceased
- d. Reservists called to active duty.
- e. Relocated to a mandated residential program (youth only).

M. POST-EXIT QUARTERLY REPORTING AFTER EXIT & FOLLOW-UP SERVICES

1. If the WIOA customer requires/receives no additional services for 90 days after case closure, their case will soft exit. Post –exit reporting is required during the 1st, 2nd, 3rd, and 4th quarter after exit for all cases. The only exceptions are neutral closures which do not require follow-up. All follow-ups must be entered and reported in EF.

2. Customers who report problems with their new job, or who have a history of job retention issues (such as attendance, prior terminations, anger management issues, etc.), may be contacted with greater frequency, to ensure that they are adjusting to their new employment.

3. Customers that experience problems will be offered additional follow-up services such as counseling, workshops and referrals to appropriate community or mental health related services. If appropriate, the Career Advisor may mediate between the employee and employer if concerns arise.

Follow-up services must be made available, as determined appropriate by the LWDB, for a minimum of 12 months following the first day of employment, to participants who are placed in unsubsidized employment with the appropriate Employ Florida follow-up service activity code entered. Customers who attest that they do not want follow-up activities must be case noted in EF to document their request. Quarterly reporting must still be recorded.

Follow-up Service Codes:

- **F01** Referral to Community Resources Code is recorded when a participant is referred to a community resource.
- **F02** Referral to Medical Services Code is recorded when a participant is referred to medical services.
- **F03** Tracking Progress on the Job Code is recorded to track a participant's progress on the job, and to identify any additional follow-up services the participant needs.
- **F04** Work Related Peer Support Group Code is recorded when a participant is referred to a work-related peer support group. F05 Assistance securing better paying job

Code is recorded when a participant receives assistance with obtaining employment that has a higher wage.

- **F06** Career development and further education planning Code is recorded when a participant receives additional career counseling, planning or other related activities.
- **F07** Assistance with Job/Work Related Problems Code is recorded when a participant receives assistance with solving job- or work-related issues.
- **F08** Adult Mentoring Code is recorded when a participant receives adult mentoring.
- **F09** Tutoring Code is recorded when a participant receives tutoring.
- **F10** Leadership Development Code is recorded when a participant receives leadership development training.
- **F11 Other Follow Up Service** not classified Code is recorded when a participant is referred to or receives a follow-up service that is not otherwise covered by one of the follow-up codes available in Employ Florida.

N. NATIONAL EMERGENCY GRANTS (NEG)

National Emergency Grants (NEG), including Base Re-Alignment and Closure (BRAC) projects, will align with WIOA Dislocated Worker operating procedures and with any special provisions the grant may provide.

CHAPTER 4. RAPID RESPONSE

CareerSource Escarosa's Rapid Response Team is in place to respond when companies lay-off or dislocate workers. The Team is alerted to company closings and layoffs by notices received under the Worker Adjustment and Retraining Notification (WARN) Act. Notices are sent to the CareerSource

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Escarosa Chief Executive Officer and Chief Operating Officer from the Department of Economic Opportunity's Reemployment and Emergency Assistance Coordination Team (REACT). The Chief Operating Officer alerts the Rapid Response Team Leader and the local Rapid Response process begins.

A. THE RAPID RESPONSE TEAM

CareerSource Escarosa's Rapid Response Team is comprised of the following employees:

1. Business Services - The Business Services Manager serves as the Rapid Response Team Leader and is responsible for initial contact with the affected employer.
2. Department of Economic Opportunity (DEO) Representative - The DEO Representative participates in the Rapid Response information sessions for the affected workers. They provide an overview of services and basic information regarding the Re-Employment Assistance application process and Universal Services
3. WIOA Career Advisor - The Career Advisor participates in the Rapid Response employee information sessions and provides an orientation to the WIOA Dislocated Worker Program along with the One-Stop Service Delivery System resources and services.
4. Other Professionals - Additional professionals may participate in the Rapid Response process dependent upon the size of the dislocation and the needs and demographics of the affected workers. For example, representatives of post-secondary training organizations, veteran's services representatives and language interpreters may be utilized as appropriate.

B. THE RAPID RESPONSE PROCESS

Upon receiving the WARN notice or upon learning of an impending dislocation event the Business Services Manager (Rapid Response Team Leader) will:

1. Visit the worksite and meet with the employer to discuss impending layoffs and applicable services.
2. Make the employer aware of employee training resources that may help the employer reduce the size of the layoff or possibly prevent the layoff.
3. Assist the employer and/or workers in completing a Trade Act petition where applicable.
4. Prepare the Rapid Response Visit Report and forward it to the State REACT staff.
5. Schedule and provide Rapid Response orientation sessions for the affected workers, informing them of reemployment services for which they are potentially eligible. They will also answer questions regarding Re-Employment Assistance Claims, placement assistance, retraining and community services.
6. Survey the workers to determine their specific service needs and forward a count to the State REACT.
7. After the affected workers have completed the Rapid Response orientation sessions, the affected workers interested in One-Stop and WIOA services then follow the WIOA Dislocated Worker process for assisted training services.
8. In situations where notification of layoffs or plant closings are received after the workers have been terminated from

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employment, an attempt is made to contact the dislocated workers and explain the services available to them at the One-Stop Center. Information sessions are then offered at the One-Stop Center for those affected workers.

C. RAPID RESPONSE REPORTING REQUIREMENTS

The Rapid Response Team Leader is responsible for information gathering and report submission. Reports, forms and data are submitted to the CareerSource Escarosa Chief Executive Officer, Chief Operating Officer, WIOA Manager and REACT. Data from these reports and worker surveys are used for planning purposes and to determine if additional resources will be needed to serve the affected workers. Worker surveys are also a pre-assessment tool to determine specific needs of the individual workers. The required documents are:

1. On-site Rapid Response Visit Report is completed after a WARN notice is received and an on-site visit is conducted.
2. Expeditious Response Report is completed after the Rapid Response team makes an on-site visit without a WARN notice being filed.
3. Dislocated Worker Transitional Reemployment Services Survey is administered to affected workers at the end of the Rapid Response orientation session. The survey gathers demographic information and initial interest in programs and services. It is also used for service planning purposes and to determine if additional resources and funding are needed.
4. Monthly Rapid Response Report is a form in which survey data is compiled and submitted to REACT five (5) working days after the last day of the month.

CHAPTER 5. TRADE ADJUSTMENT ASSISTANCE

The Trade Adjustment Assistance (TAA) Program assists trade-affected workers who have lost their jobs as a result of increased imports or shifts in production out of the United States. TAA program services and benefits are designed to facilitate workers in getting back to work quickly. In order for trade affected workers to receive benefits and services under the TAA program, their company must be TAA certified. The first step in becoming certified is filing a petition.

A. FILING A PETITION

1. A petition may be filed by a group of three or more workers employed by the affected company, by a company official, by One-Stop operators or partners (including state employment security agencies and dislocated worker units) or a union or other duly authorized representative of such workers. The workers on whose behalf a petition is filed must be, or have been, employed at the firm or subdivision identified in the petition.

2. Petitioners may request assistance in preparing the petition at their local One-Stop Career Center (CareerSource Escarosa), by contacting the State Dislocated Worker Unit (REACT), Employment Security Agency or the Department of Trade Adjustment Assistance (DTAA) in Washington, D.C. The petition and related TAA information may be acquired online: <http://www.idoleta.gov/tradeact>

3. When the Rapid Response Team Leader learns of a company closing or mass layoff through WARN. The Team Leader will make initial contact with the employer and ascertain if the closing is due to increased imports or a shift in production outside of the United States. If it appears that the

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employer may qualify for TAA certification, the Rapid Response Team Lead will provide information regarding the TAA certification process, application materials and assisted if needed.

B. TAA CERTIFICATION

1. After receiving a TAA petition, Department of Trade Adjustment Assistance (DTAA) investigators analyze and review facts concerning the worker's layoffs or work reductions and determine whether or not the company/workers are eligible for TAA.

2. When a company is TAA certified the State DEO office notifies the CareerSource Escarosa Chief Executive Officer and TAA Coordinator (Jobs & Benefits Administrator). The Jobs & Benefits Administrator will notify DEO regarding date(s) of worker orientations and the affected workers will be sent letters notifying them of the TAA certification and orientation date(s).

3. CareerSource Escarosa conducts a TAA/Rapid Response orientation to inform affected workers of the process and services that they are eligible for under TAA.

4. The TAA certified workers are also sent enrollment application forms for TAA by the State DEO (Forms: ETA-855, UCB/TRA-344, and UCB/TRA-345). If the affected worker is interested in TAA services, they are required to complete the application and return it to the address listed on the application materials.

5. Information sent with the TAA application materials also instruct the affected worker to contact their local TAA Coordinator for an appointment with an Employment Security Representative in order to apply for appropriate training or a waiver in order to receive TAA benefits. The affected worker

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has 16 weeks from the date of separation to enter into training or secure a waiver (Waiver Form AWI 566), in order to receive TAA benefits.

C. TAA SERVICES

1. Once contact is made, the TAA Employment Security Representative will ensure that the TAA application was processed and approved by checking the Employ Florida System. If DEO has received and processed the TAA application it will appear in the Employ Florida System. The affected worker will then be dual-enrolled in TAA and WIOA and undergoes the WIOA Dislocated Worker intake and eligibility process.
2. The Employment Security Representative will complete and fax all required forms; 2100-A, 2100-B, 2100-C and ETA 858 to DEO notifying them of the participant's enrollment in school, or waiver request. These forms advise the TRA unit of the participant's training plan, selected education program, school, cost of program, length of program and estimated completion date of the program.
3. While participating in the dual-enrolled TAA and WIOA programs, the participant will receive WIOA services that are the same as those available for dislocated workers, including career planning assistance, case management, ongoing assessment, job placement and follow-up services.
4. Upon completion of training program, closure forms are sent to Tallahassee.

CHAPTER 6. ON THE JOB TRAINING

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On the Job Training (OJT) provides employers with up to a 50% reimbursement of a newly hired employee's wages, for up to six months, while the new employee is being trained in their job. Wages for suitable contracts must be at \$13.00 an hour or higher to be considered.

A. TARGETED INDUSTRIES

To become a provider of OJT, an employer must be in one of the following targeted industries.

- IT/Cybersecurity (51)
- Healthcare and Social Assistance (62)
- Manufacturing (including aviation) (31, 32, 33)
- Transportation, utilities, trade (including warehousing/logistics) (48, 49)
- Construction (23)

B. IDENTIFY PROVIDERS AND CANDIDATES

Initial contact can either be made by an employer interested in participating in OJT or OJT can be solicited by a Business Service Representative who is targeting the above industries and providing introduction and education to employers about the OJT program.

1. All providers will be registered with Employ Florida and advertise the positions they have available on the website. Candidate must agree to cooperation and compliance with CareerSource Escarosa's program.
2. Employer will identify the potential candidates that respond to the job posting that meet their qualifications and expectations. Appropriate candidates may also be referred for the position by WIOA Career Advisors and other One-Stop staff.

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The employer will then contact the Administrative Coordinator WIOA Business Service Representative to begin the WIOA eligibility process for the potential candidate.

3. For the business to participate in EWT/OJT they have to hold a business licenses and the business has to reside in Escambia or Santa Rosa County. However, the employee does not have to reside in Escambia or Santa Rosa County. This program is designed to promote and service local business with obtaining and retraining skills necessary to maintain talent for local industry.

C. CANDIDATE ELIGIBILITY

1. The Administrative Coordinator WIOA Business Service will contact the candidate(s) to obtain eligibility and intake information. The Administrative Coordinator WIOA Business Service will contact the potential employee to arrange an eligibility intake appointment and inform him/her of the necessary documentation he/she will need to provide which includes:

- a. Driver's license with current address, if address is not valid on the driver's license, other documentation must be provided. If the driver's license has a gold star on the top right this will serve as a real id from the DMV. The REAL ID Act of 2005. Florida began issuing REAL ID after January 1, 2010. The new credentials have a star in the upper right corner of the card. Florida is a REAL ID compliant state and all Florida licenses should be accepted nationwide.
- b. Signed Social Security card.
- c. DD214 if they have served in the military.
- d. Birth certificate and (3) current paycheck stubs if he/she is currently employed.

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2. The Intake and eligibility process for OJT candidates follows the same process used for all WIOA Adult and Dislocated Worker participants (See Chapter III, section E).

3. After the intake process is complete, the Administrative Coordinator WIOA Business Services will scan documents into EF and complete intake to include a copy of their current resume.

D. CONTRACT CONTENTS

1. The Administrative Coordinator WIOA Business Service will meet with the employer to determine the training period duration. The amount of training given to the OJT candidate will be determined by the nature of the job, potential employee's skills, education, communication abilities, experience and supervision needed. After this is established, the Administrative Coordinator WIOA Business Service will complete an OJT Training Outline.

2. The Administrative Coordinator WIOA Business Service will obtain the Employers Federal ID number and complete an OJT contract.

3. The Administrative Coordinator WIOA Business Service will then review the OJT requirements with the Employer's representative. A completed OJT contract must contain the following:

- a. OJT Company Pre-Checklist
- b. OJT Training Agreement & Work Order
- c. OJT Training Outline
- d. The General Terms of the Contract
- e. Assurances

- f. Grievance/Complaint, Hearing/Appeal Procedures which must be signed by the employer or the employer's representative, trainee and the Business Service Representative
- g. OJT Employee Training Agreement
- h. Timesheets
- i. OJT justification
- j. Certificate of Training
- k. Verification of Household size
- l. Financial Statement Form
- m. Resume

Once a training contract has been entered, the employer/provider has 30 days to commence training, otherwise funds will be de-obligated.

E. TRAINING COMMENCEMENT

1. The OJT candidate must read and sign all relevant forms including the OJT Employee Training Agreement prior to implementation of the OJT contract. At this point, the candidate may begin training with the provider.
2. Timesheets must be completed weekly, bi-monthly or monthly depending on the employer's payroll procedures. The supervisor of the OJT employee will evaluate the candidate every pay period in specific areas of performance. Both the supervisor and the candidate must sign the timesheet which can then be submitted for payment:

Career Source Escarosa
Attn: Ann Roeber
6913 North 9th Ave
Pensacola, Florida 32504

F. COMPLETION

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Once the OJT period is complete the employee will be a successful outcome for OJT training if the employer retains the employee. At that time a Certificate of Achievement will be awarded to the employee for the completion of the OJT.

CHAPTER 7. EMPLOYED WORKER TRAINING (EWT)

The EWT program is designed to help business's offset training costs for current employees who require skill upgrading to maintain their employment. This may include training on new equipment, technology, product lines, internal management changes, safety, etc. Employers may be reimbursed for instructor costs (internal or external to the employer) and training materials. To be considered for this grant, wages must be at \$13.00/hour or higher.

A. TARGETED INDUSTRIES

For an employer to be eligible for Employed Worker Training (EWT), they must be registered in the Employ Florida Marketplace and be in one of the following targeted industries:

- IT/Cybersecurity (51)
- Healthcare and Social Assistance (62)
- Manufacturing (including aviation) (31, 32, 33)
- Transportation, utilities, trade (including warehousing/logistics) (48, 49)
- Construction (23)

B. IDENTIFYING EWT EMPLOYERS AND CANDIDATES

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1. Initial contact can either be made by an employer interested in participating in EWT or it can be solicited by a Business Service Representative who target high wage/high demand industries and providing introduction and education to employers about EWT.

2. To be eligible for EWT services, the employed worker(s) must qualify in one of the following two ways:

a. They must be in need of the training to retain their employment and/or increase their employability with the employer, OR

b. They are in need of services in order to retain their self-sufficient employment.

3. The employer must provide a written statement that the employee(s) will not be retained unless additional training or services are received.

4. For the business to participate in EWT/OJT they have to hold a business licenses and the business has to reside in Escambia or Santa Rosa County. However, the employee does not have to reside in Escambia or Santa Rosa County. This program is designed to promote and service local business with obtaining and retraining skills necessary to maintain talent for local industry.

C. ELIGIBILITY

1. The Business Service Representative will provide the contact information of the candidate(s) to the Administrative Coordinator WIOA Business Services. The Administrative Coordinator WIOA Business Services will contact the potential employee to arrange an eligibility intake and inform him/her of

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the necessary documentation he/she will need to provide which includes:

- a. Driver's license with current address, if address is not valid on driver's license, other documentation must be provided which includes current address. Or If the driver's license has a gold star on the top right this will serve as a real id from the DMV. The REAL ID Act of 2005. Florida began issuing REAL ID after January 1, 2010. The new credentials have a star in the upper right corner of the card. Florida is a REAL ID compliant state, and all Florida licenses should be accepted nationwide.
- b. Signed social security card
- c. DD214 if they have serviced in the military
- d. Birth Certificate or proof of birth date

Note: An employed worker does not have to meet the income eligibility requirements for career and training services for adults and dislocated workers under WIOA, unless they are also enrolled as a participant in the WIOA adult or dislocated worker program. (WIOA TEGL 19-16 section 13)

2. After the intake process is completed the Intake Specialist will deliver the completed intake folder to the Business Services Representative to complete the EWT application.

D. CONTRACT COMPLETION

1. The Business Services Representative will meet with the employer to determine the training period duration and the provider of said training. The scope of the training given to the EWT candidate(s) will be determined by the nature of the job, EWT employee's current skills, education, communication abilities, experience and supervision needed.

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2. The Business Services Representative will obtain the employers Federal ID number and review the EWT application with the Employer. After review, all parties involved will sign and date. The Equal Opportunity Statement must accompany the application packet.

3. The completed application will be mailed, or hand delivered to:

Employed Worker Training Program
CareerSource Escarosa
Attn: Belinda Todd
6913 North 9th Ave.
Pensacola, FL 32504

4. The CEO approves all training agreements. If approved, training will begin on the date agreed to by both parties.

5. The EWT candidate will be monitored and evaluated by the Business Services Representative. If the candidate needs special assistance, he/she will be referred to a CareerSource Escarosa Career Counselor and may be referred to other community agencies for support and assistance as needed.

6. Note: Grant funds disbursement will be at the discretion of CareerSource Escarosa and any arrangements made with the EWT provider.

CHAPTER 8. WORKFORCE INVESTMENT AND OPPORTUNITY ACT (WIOA) YOUTH PROGRAMS

A. OVERVIEW

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The CareerSource Escarosa Workforce Investment and Opportunity Act (WIOA) Youth Program targets services to at-risk students attending school and youth not attending school in either Escambia County or Santa Rosa County, Florida with barriers to employment, academic and vocational achievements. The program uses goals which lead to meaningful attainments and credentials, as well as lasting placements into jobs and post-secondary education.

Youth services include school-based learning, work-based learning and experience that connect participants with occupational skills, as well as advanced demand-occupation training opportunities, employment, and long-term retention.

B. ELIGIBILITY

1. Youth are identified for eligibility from various sources:

- a. Self-referral
- b. School Records
- c. Teacher, Guidance Counselor, or other Administrative Staff Referrals
- d. Division of Juvenile Justice (DJJ)
- e. Foster Care Programs
- f. Department of Children and Families (DCF)
- g. Escambia and Santa Rosa County Health Department
- h. Families First Network
- i. Other Community Service Organizations

2. Those youth that are living in Escambia County that are/are not attending public school or currently enrolled and between school terms and intend to return to school, are referred for services through the School Board of Escambia County. Youth that are living in Santa Rosa County that are not attending public school or currently enrolled and between school terms

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and intend to return to school, are referred for services through the School Board of Santa Rosa County. Youth that are living in either Escambia or Santa Rosa County that are dropouts, currently not school registered, may or may not be attending public school in either county, are referred for services through the Children's Home Society of Northwest Florida (CHS).

3. Referrals are made to the appropriate service provider. The appropriate service provider is contacted and meets with the applicant to assess their needs and barriers. The service providers utilize the Test for Adult Basic Education (TABE) either at their location or refer the youth to CareerSource Escarosa for TABE testing. The youth's scores are used to assess numeracy and literacy levels. The Lower Living Standard Income Level and Poverty Guidelines (LLSIL) are utilized to determine Low Income eligibility. To qualify for the Local Workforce Development Board 1 (LWDB 1) WIOA Youth Program, the youth must be in at most, the 70% LLSIL (Metro) category (See Section 4 - "Determining Low Income Based on Earned Wages").

All LWDB 1 WIOA Youth (except 5% - see Section 5 – "Escarosa 5% Window Policy") are categorized in one of two WIOA funding streams. The following is the LWDB 1 screening/assessment policy for both funding streams:

In-School Youth - Must be within the ages of 14 -21 years old and must also be determined Low Income:

a. Youth is Low Income – Below 70% Metro LLSIL for income of family as determined by household size, or receives or is a member of a family that receives cash payments under an income based public assistance program, or is a member of a household that receives (or has been determined within the six months period prior to the application to be eligible to receive)

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food stamps, or qualifies as a homeless individual, or is a foster child, or is disabled.

b. In addition to Low Income all In-School Youth must have one or more of the following barriers:

c. Youth is Basic Skills Deficient – Reading or Math below the 9th grade level documented by TABE

d. Youth is pregnant or parenting – Documented by Doctors Statement or Birth Certificate

e. Youth is a School Dropout – Documented by School Records or Applicant Statement

f. Youth is an Offender – Documented by Court DJJ Records.

g. Youth who requires additional assistance to complete an educational program, or to secure and hold employment.

h. Youth has little to no previous work history in a demand occupation.

Out-of-School Youth – Must be determined eligible by not attending any school (as defined under State Law); not younger than age 16 or older than age 24 and one or more of the following barriers:

a. Youth is a School Dropout – Documented by School Records or Applicant Statement.

b. 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. Calendar quarter is based on how the local school district defines its school year quarters.

c. Youth recipients of a secondary school diploma or its recognized equivalent who is a low-income individual and youth is either Basic Skills Deficient (Reading or Math below 9th grade level documented by TABE), or an English language learner.

d. Youth who is subject to the Department of Juvenile Justice System.

- e. Youth who is homeless, a runaway, an individual in foster care or who has aged out of the foster care system, a child eligible for assistance under section 477 of the Social Security Act, or an individual who is in and out-of-home placement.
- f. Youth is pregnant or parenting – Documented by Doctors Statement or Birth Certificate.
- g. *Youth is an individual with a disability.
- h. Youth who requires additional assistance to complete an educational program, or to secure or hold employment.
- i. Youth is a low-income individual who requires additional assistance to enter or complete an educational program or to secure or hold employment.
- j. Youth enrolled in an Adult Basic Education Program (ABE) or GED are considered to be not attending school and are defined as Out-of-School Youth.

* Documentation could include medical, legal or school records (documenting a disability) or an applicant's statement of need.

4. Determining Low Income Based on Earned Wages:

An individual that received an income, or is a member of a family that received a total family income, for the 6 months period prior to application in relation to family size, does not exceed the "poverty" level (70% Metro) as set forth in the Lower Living Standard Income Level and Poverty Guidelines (LLSIL).

A "family" is defined as: Two or more individuals related by blood, marriage, or decree of court (adoption), which are living in a single residence, and are included in one or more of the following categories:

- a. A husband, wife, and dependent children
- b. A parent or guardian and dependent children

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c. A husband and wife

5. The following guidelines should be used to calculate household (Includable) income:

- a. Wages and salaries before any deductions
- b. Net receipts from non-farm self-employment
- c. Receipts from farm self-employment
- d. Regular payments from railroad retirement, strike benefits from union funds, worker's compensation, and training stipends
- e. Alimony
- f. Pensions
- g. Regular insurance or annuity payments
- h. College or university grants, fellowship, and assistantship
- i. Dividends, interest, net rental income, net royalties, periodic receipts from estates or trust
- j. Net gambling or lottery winnings

6. The following guidelines should be used to calculate household (Excludable) income:

- a. Unemployment compensation
- b. Child support payments
- c. Welfare payments
- d. Capital Gains
- e. Tax refunds, gifts, loans, lump sum inheritance, one-time insurance payments or compensation for injury
- f. Non-cash benefits
- g. Medicare, Medicaid, Food Stamps, school meals and housing assistance
- h. WIOA income
- i. Pell Grants
- j. Needs based scholarship assistance
- k. Emergency Assistance or general Relief funds

- l. Military pay for individuals on active duty, military reserve or in the;
- m. National Guard
- n. Veteran's benefits
- o. Social Security Old Age and Survivors' Insurance benefits;
- p. Social Security Disability Insurance benefits

7. The following are acceptable eligibility verification sources for "Low Income" Individuals:

- a. Pay stubs
- b. Pension Assistance Records
- c. Public Assistance Record
- d. Quarterly Estimated Tax for Self-employed Person (Schedule C)
- e. Social Security Benefits
- f. Telephone Verification
- g. Workers' Compensation Records
- h. Other Applicable Documentation (specified by CareerSource Escarosa)
- i. Applicant Statement/ Self Attestation (in limited cases)

8. Escarosa 5% Window Policy:

CareerSource Escarosa has determined locally that for its "5% Window Policy" that a youth can be considered for service without meeting the low-income criteria, as long as they possess at least two of the same documented barriers as outlined above. Escarosa also applies a "most-in-need" policy when WIOA funding is determined "limited".

9. Priority of service is given to those who are "at-risk of public assistance" (See "Additional Eligibility Requirements" below) which is identified by being in the 70% (Metro) category of the LLSIL.

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General Eligibility Requirements:

1. Age at time of registration/participation.

The following are acceptable eligibility verification sources for Age:

- a. Baptismal Record with Date of Birth
- b. Birth Certificate
- c. DD-214
- d. Driver's License
- e. Federal, State or Local Government ID Card
- d. Hospital Birth Record
- e. Passport
- f. Public Assistance/Social Service Record
- g. School Records/ Identification
- h. Work Permit - if date of birth is shown
- i. Crossmatch with Dept. of Vital Statistics
- j. Completed and Signed (Federal) I-9 Form
- k. Other Applicable Source Documentation, (Specified by Escarosa)

2. Selective Service Registrant (if applicable)

This only applies to Males born on or after January 1, 1960 must register with the selective service system within 30 days after their 18th birthday or at least before they reach the age of 26. Proof of compliance with the Military Selective Service Act must be verified prior to enrollment or during enrollment should the individual turn 18 during participation.

The following are acceptable eligibility verification sources for Selective Service Registration:

- a. Selective Service Status Information Letter
- b. Selective Service Registration Record
- c. Selective Service Verification Form
- d. Stamped Post Office Receipt of Registration
- e. Internet - www.sss.gov
- f. Selective Service Registration card
- g. Additional Documentation if it validates Selective Service Registration
- h. Applicant Statement

3. Citizenship or Authorization to Work

The following are acceptable eligibility verification sources for Citizenship or Authorization to Work:

- a. Baptismal Certificate with Place of Birth
- b. Birth Certificate
- c. DD-214 (New DD214 Does Not Verify Citizenship)
- d. Food Stamp Records
- e. Foreign Passport Stamped: "Eligible to Work"
- f. Hospital Birth Record
- g. Naturalization Certification
- h. Public Assistance Records
- i. United States Passport
- j. Native American Tribal Document
- k. Alien Registration Card (indicating the right to work)
- l. School/State or Federal ID Card
- m. Documentation Specified on the (Federal) I-9 Form
- n. Completed and Signed (Federal) I-9 Form
- o. Social Security Card (work eligible)
- p. Telephone Verification
- q. Applicant Statement
- r. Other Applicable Documentation, (specified by CareerSource Escarosa)

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Additional Eligibility Requirements:

1. "Economically disadvantaged" which is defined as:
An individual who receives or is a member of a family that receives Temporary Assistance for needy Families (TANF).

Verification Sources:

- a. Public Assistance records/ Printout.
- b. An individual who receives or was determined eligible to receive Food Stamps in the last six months.

Verification Sources:

- a. Current authorization to obtain food stamps
- b. Letter from food stamp disbursing agency
- c. Postmarked food stamp mailer with applicable name and address
- d. Public assistance records/printout

2. Public Supported Foster Child: A foster child on behalf of whom state or local government payments are made.

Verification Sources:

- a. Court contact
- b. Court documentation
- c. Verification of payments made on behalf of child
- d. Written statement from state/local agency

3. Homeless: An individual that lacks a fixed, regular, and adequate nighttime residence. This definition includes any individual who has a primary night-time residence that is:
a. a publicly or privately-operated shelter for temporary accommodations.

- b. an institution that provides a temporary residence for individuals intended to be institutionalized.
- c. a public or private place not designed for or ordinarily used as a regular sleeping accommodation for human beings.

This could also include a person under 18 years of age who absents himself/ herself from home or place of legal residence without the permission of his/ her family (i.e. runaway youth).

Note that the definitions above do not include an individual imprisoned or detained under an Act of Congress or State Law. An individual who may be sleeping in a temporary accommodation while away from home should not, as a result of that alone, be recorded as "homeless".

Verification Sources:

- a. Written statement from an individual providing temporary assistance (i.e. runaway youth).
- b. Written statement from Social Security Agency
- c. Applicant statement/self-attestation, in limited cases

4. A "disabled" youth may be eligible for services even if the family income does not meet the low-income criteria, as long as the youth's own income meets the criteria or the criteria for cash payments under any Federal, State or local public assistance. An individual that indicates that he/she has any "disability," as defined in Section 3(2)(a) of the Americans with Disabilities Act of 1990 (42 U.S.C. 12102). A "disability" is a physical or mental impairment that substantially limits one or more of the person's major life activities. In general, a "substantial limitation" either: Prevents the person from performing an activity that the average person can perform, or significantly restricts the person in performing such an activity (as compared to the average person).

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Verification Sources:

- a. Letter from a Drug or Alcohol Rehabilitation Agency
- b. Medical Records
- c. Social Service Records/Referrals
- d. Physician's Statement
- e. Psychiatrist's Statement
- f. Psychologist Diagnosis
- g. Rehabilitation Evaluation
- h. School Records
- i. Sheltered Workshop Certification
- j. Workers' Compensation Record
- k. Social Security Administration Disability Records
- l. Veterans Administration Letter/Records
- m. Vocational Rehabilitation Letter
- n. Applicant Statement
- o. Social Service Records/Referrals

C. SERVICE PROVIDERS

For Fiscal year 2020/2021, CareerSource Escarosa currently utilizes the services of three providers. These service providers are selected through a Request for Proposal /Competitive Bid process and are subject to change.

- 1. The School Board of Escambia County: Serves in-school and out-of-school youth of Escambia County.
- 2. The School Board of Santa Rosa County: Serves in-school and out-of-school youth of Santa Rosa County.
- 3. Children's Home Society of Northwest Florida (CHS): Serves in-school and/or out-of-school youth of Escambia and Santa Rosa Counties.

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The above providers are all contracted to provide their services in a similar manner based upon each participant's particular needs, with the following 14 key elements:

- a. 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;
- b. Alternative secondary school services, or dropout recovery services, as appropriate;
- c. Paid and unpaid work experience;
- d. Occupational skills training;
- e. Education offered concurrently with and in the same context as workforce preparation activities and training for a specific occupation or occupational cluster;
- f. Leadership development opportunities, which may include community service and peer centered activities encouraging responsibility and other positive social and civic behaviors, as appropriate;
- g. Support Services;
- h. Adult mentoring;
 - i. Follow-up services for not less than 12 months after the completion of participation, as appropriate;
- j. Comprehensive guidance and counseling, which may include drug and alcohol abuse counseling and referral, as appropriate;
- k. Financial literacy education;
- l. Entrepreneurial skills training;
- m. Provide labor market and employment information, as appropriate;
- n. Activities that help youth prepare for and transition to postsecondary education and training.

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Each provider provides first preference to those youth who demonstrate the following barriers:

- a. Basic Skill/Literacy and Numeracy deficient (See Section “B” (Sub-Section 3 - Basic literacy skills deficient).
- b. Those Youth determined to be of extra high risk – e.g., youth offenders, homeless youth, youth in foster care/aging out of foster care, youth of incarcerated parents, etc.

The service providers utilize the following procedures to accomplish the tasks set forth in their contracts:

- a. Service providers receive their referrals from their various sources (See Section “B” – “Eligibility”, Subsection 1).
- b. An appointment is made with the service provider and the youth applicant for assessment and eligibility.
- c. All documentation requirements and eligibility requirements are reviewed with the youth. All barriers are to be identified with the Case Manager and the supporting documentation should be requested of the youth.
- d. The TABE test is administered at the service provider's location (or a referral is given for testing through CareerSource Escarosa) to determine Basic Skills proficiency.
- e. All providers will be required to compose an Individual Service Strategy (ISS), on the Employ Florida (EF) system, for all applicants referred to the Career Center Intake Specialist. The ISS specifies the activities, services, and goals agreed upon by both the CA and the applicant that will lead toward the applicant's success. At a minimum, the ISS should include:
 - The applicant's assigned work or educational activity.

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- Support services to be provided.
- The number of hours a participant is assigned to each work or educational activity.
- Long-term Employment/Educational Goal.
- Short-term Employment/Educational Goal.
- Basic skills assessment.
- Barriers to success.
- Steps to completion of goals

4. Once TABE testing is completed and scored; the youth returns all requested documentation. The documentation is then forwarded to the CareerSource Escarosa Intake Specialist for a Certification Interview.

5. Once the participant has completed the Certification Interview (See Section “D” – “Intake”) and deemed “eligible”, both the Case Manager and the participant will sign the ISS. The ISS will be updated on a continuing basis on the EF system. The ISS must be career-oriented with the goals being: high school completion or General Equivalency Degree (GED) obtainment and/or postsecondary/advanced education, or unsubsidized employment.

6. Each provider also has the responsibility of reporting on their individual established goals that must be met to maintain compliance with their individual contracts. (See Section “F” – “Reporting”)

D. INTAKE

1. The three WIOA Youth service providers work in conjunction with the Career Center Intake Specialist to verify individual applicants' eligibility (See Section “B” – “Eligibility”) for the WIOA Youth program.

2. A case folder is created for each applicant by the Service Provider seeking services through the program.
3. An "Appointment Letter for WIOA Certification Interview" is generated and sent to the student applying for service.
4. In the process of certifying eligibility the Intake Specialist utilizes the following forms package and information (as applicable):
 - a. The Lower Living Standard Income Level and Poverty Guidelines (LLSIL)
 - b. CareerSource Escarosa Folder Transfer Sheet
 - c. Verifications of Sources Form
 - d. CareerSource Escarosa - LWDB 1 WIOA Application
 - e. WIOA Address/ Phone Number Change Form
 - f. CareerSource Escarosa Registration Form
 - g. TABE Scores
 - h. Proof of Address, Social Security Number and Citizenship
 - i. Handicap Certification
 - j. Proof of Income
 - k. WIOA Applicant Statement
 - l. Certification of Sole Support Form
 - m. Verification of Household Size Form
 - n. Youth Student Status at Time of Certification Form
 - o. WIOA Youth Barrier Form
 - p. Equal Opportunity Form
 - q. CareerSource Escarosa Grievance Procedures
 - r. WIOA Applicant Authorization to Release and/or Request Information
 - s. CareerSource Escarosa Partner Agency/Organization Statement of Purpose for Collecting Social Security Numbers Form
 - t. Policy Statement on Sexual Harassment

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5. The Youth's information is entered into the State of Florida's Management Tracking System - Employ Florida (EF). Because eligibility is entered into the EF system, all eligibility must be documented prior to assigning the first activity in EF. This includes: General Eligibility, Program-Specific Eligibility, Justification for Intensive/Training Services and Justification for Support Services.

6. If the applicant is deemed ineligible for the program, the reason(s) is (are) documented and the applicant is referred back to the Service Provider, to see if other services are available.

7. If the student is deemed eligible for services, the Intake Specialist then refers the student back to the Service Provider to begin receiving services as a participant and to begin receiving Case Management.

E. CASE MANAGEMENT

The Career Advisors will be the main point of contact and will counsel participants to help them complete the various components of their ISS.

The following procedures will be used to conduct Career Management:

1. Once a participant has been deemed eligible for the WIOA Youth Program, the designated Service Provider's Career Advisor (CA) meets with the participant to begin services within 30 days of the WIOA Registration date. Utilizing the participant's ISS, the CA establishes goals and rules are reiterated to the participant. All necessary documentation including, but not limited to, support services (See Section "D" – "Intake"), is

completed by the CA and participant and then forwarded to the proper entities to begin services in a timely manner.

2. The CA will make at least monthly contact with each participant. The participant will be required to provide an update to the CA of any status changes or change of contact information. The CA shall verify that the participant is attending and completing all required work hours or educational activities. All provided documentation will be copied and retained in the case file. The CA should counsel and guide participants on continued completion and outcome of work and educational activities and ensure that program goals are being met, utilizing the ISS.

3. A review of the participant's ISS will be made to update its progress and make any necessary changes.

4. All WIOA Youth participants are required to successfully complete at least one goal for each which he/she is enrolled in alignment with program components and as noted in the ISS. Goal completions must occur within 365 days of the participant's EF WIOA Registration Anniversary Date. A new goal must be set for each participant on his/her EF WIOA Registration Anniversary Date. CA's are required to monitor and review each participant's goals monthly and update them, as necessary.

5. The CA is responsible for participant data entry into the EF system to help maintain compliance and track the individual's progress as well as complete follow-up services for up to 12 months after exit. The EF system is also utilized by the State of Florida to help verify compliance with State and Federal regulations. Case Notes are maintained in individual participant's case folders, as well as entered into the EF system.

6. If a participant chooses GED, High School completion, or postsecondary education as their primary activity, the following will apply:

a. The Service Provider will approve or disapprove all requests for educational training.

b. The CA will help the participant establish a progressive educational plan by the use of assessments (See Section “B” – “Eligibility”) and the participant’s ISS to allow them to complete their educational goals on time.

c. All participants will be required to make contact with their designated CA on a monthly basis.

7. If a participant chooses Vocational Education as their primary activity, the following will apply:

“Vocational Education” or “Training” is education or training designed to provide the participant with the skills and certification necessary for employment in an occupational area. Vocational education or training may be used as a primary program activity. Participants who successfully complete vocational education are likely to result in employment at a higher wage than the participant would have been likely to attain without completion of training. Procedures for vocational training are as follows:

a. The Service Provider will approve or disapprove all requests for vocational training, depending on slots available and merits of the request.

b. All participants will be required to make contact with their designated CA on a monthly basis.

8. If a participant chooses Unsubsidized/Subsidized Employment – the participant works in the private sector for pay. Worksites are to be established and approved through the Service Provider and must meet established Federal and State guidelines.
9. All activities and all plans must be closed in the EF system prior to closing a case. Case Closures must contain the exit reason (positive or negative).
10. The CA is required to case note the reason for closure in the EF system.
11. The participant's file (hard copy) is to be filed and stored for no less than five (5) years (according to CareerSource Escarosa's current file-storage procedures).
12. For case termination procedures (See Section "H").

F. REPORTING

1. Documentation and data entry of all WIOA youth participant enrollments, status changes, goal sets/attainments, credentialing, outcomes, follow-ups, and career management/job developer counseling notes/information in a participant's files and on EF should be timely, comprehensive and accurate.
2. Monthly and Quarterly Performance Reporting is required by CareerSource Escarosa. Each Service Provider shall maintain and provide a timely report that includes accurate data for the previous month/quarter. Reports should be provided to the designated CareerSource Escarosa WIOA Youth Coordinator (electronically) no later than the 12th of the following month.

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3. Any and all other ad hoc reports will be produced by the Service Provider at CareerSource Escarosa's request.

G. FOLLOW-UPS

1. As part of staff follow-up activities, each participant must receive at least one of the services listed below:

- a. Counseling
- b. Information on Job Opportunities/Job Clubs
- c. Adult Mentoring/Tutoring
- d. Access to Technology to explore Websites and facilitate Communications
- e. Youth Day Events
- f. Job Shadowing

2. Since EF is utilized for data entry, timely follow-ups should be completed at least once per quarter during the 12-month follow-up period. CA's are to track the participant's progress and report it utilizing the participant's ISS and making notes utilizing the Case Note function in EF.

3. All initial goals, as well as any subsequent established goals (i.e. - Basic Skills proficiency, job skills, vocational achievements, credentialing, etc.), should be case noted and included in the follow-up process.

H. TERMINATION

If a youth is terminated from the program the following shall apply:

1. The youth and reason for termination is identified by the appropriate Service Provider. Reasons for termination may include:

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- a. Employment
- b. Post-secondary education
- c. Incarceration
- d. Medical
- e. Entry into military service
- f. Death

2. Once the youth's Closure Status is determined, the appropriate entries are made into the EFM system to terminate the youth's services.

3. The participant's folder is then transferred to the CareerSource Escarosa Program Monitoring for retention in accordance with Federal and State regulations.

CHAPTER 9. SUPPORTIVE AND TRAINING RELATED SERVICES

A. GENERAL POLICIES

1. CareerSource Escarosa provides support services for eligible Adult and Dislocated Workers, in accordance with WIOA, Public Law Section 3(59), 134(d)(2) and (3). Through the One-Stop system Adults and Dislocated workers needing training are provided Individual Training Accounts (ITA's). Training related services are provided when required for employment or for the training activity and when not provided by the employer, the educational institution and/or another agency known to the Workforce Escarosa. Youth, support services under WIOA Section 129(c)(2)(G).

2. Needs Based Related payments (NRPs) are not authorized for Adults, or Youth, and are extremely limited under the Dislocated Worker due to Service Delivery Area 1 (SDA1) funding.

3. Determination and documentation of the need for support or training related services will be made by the Career Advisor or their immediate supervisor in accordance with established policies and procedures and as noted on the ISS/IRP.

4. The participant must be enrolled in a CareerSource Escarosa approved training activity or have an offer of employment to be eligible to receive support or training related services.

5. Support Services will be offered based upon assessed needs, and only when such funding is available.

6. Presently, the LWDB1 approved private training vendors cover books and tuition under the ITA and include the following institutions:

Fortis
New Horizons Computer Learning Center
Truck Driving Institute
University of West Florida
Virginia College of Pensacola

7. Presently, the LWDB1 approved public training vendors cover tuition only and include the following institutions:

George Stone Center
Locklin Technical Center
Pensacola State College
Alabama Coastal Community College

(Uniforms, supplies, tools, immunizations etc., are additional expenses and considered a support service)

B. SUPPORT AND TRAINING-RELATED SERVICES

1. Once a participant is determined eligible for WIOA training he/she is assigned to a Career Advisor. It is the responsibility of the Career Advisor to enter the participant into the Employ Florida (EF) system before committing to any WIOA services. At the time of the initial interview the Career Advisor determines the participants support service needs. Once those needs are established the Career Advisor completes a CareerSource Support Services Action Request (Action Sheet) and attaches supporting documents to verify the required need. UNDER NO CIRCUMSTANCES SHOULD ANY DOCUMENTS BE BACKDATED, the date the participant is approved to receive services is the actual date that services will begin.

2. The Action Sheet with supporting documents to include any clinical schedules is forwarded to the CareerSource Escarosa Center to the Eligibility Specialist.

3. The Eligibility Specialist will review all documents for accuracy and prepare item purchase agreements. No request is complete without all the documentation attached at the time of signing. If the Career Advisor is missing any part of the back-up documentation DO NOT DATE AND SEND IT to the Eligibility Specialist incomplete. The Career Advisor for the north end, because of expediency, is allowed to issue a limited number of item purchase agreements. The same rules apply to the North end Career Advisor as all Career Advisors, support services cannot be backdated, and all documents must be attached at time of signing. All tool purchases are controlled through the Support Services area and are documented and reported at

year-end to make sure that set caps of \$1,500.00 are maintained.

4. The Item Purchase Agreements are made out to the participating vendors for supplies and/or services (books, drug screening, food allowance, immunizations, lodging, physicals, specialized kits, supplies, tools, and uniforms). The Purchase Agreement is sent to the Career Advisor via carrier and given to the participant to take to the named vendor or mailed directly to the vendor. Only items listed are approved for payment.

5. The Career Advisor is issued an approved Childcare list from the Eligibility Specialist. This list is to be used by the participant to select a childcare facility approved by the Florida Department of Children and Families (FDCF) or one that is proven not to be a church run organization. It is the responsibility of the Support Service Department to maintain the childcare list and to ensure that facilities are currently licensed/registered and in compliance with separation of Church and State guidelines.

6. The Eligibility Specialist will retain documentation regarding services, vendors and terms within the Support Services Department.

7. The Eligibility Specialist will prepare all check requests with regard to WIOA support services, to include childcare payments, participant re-imbursement payments, vendor payments and transportation allowance payments. Check requests with supporting documents are then forwarded to the CareerSource Escarosa Accounting Department to issue the actual checks, The Career Source Escarosa Director or Chief Operating Officer (COO) will sign all checks.

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8. All hand delivered checks for bus tickets/passes, dental kits, postage, or special supply purchases to a vendor or in a participant's behalf are signed upon receipt of the checks at the CareerSource Escarosa Accounting Department. Receipts are retained by the Eligibility Specialist and forwarded to the Career Source Escarosa Accounting Office. All student transportation and re-imbursement checks are mailed directly to the participant by the CareerSource Escarosa Accounting Office.

9. All invoices for WIOA support services are received and processed by the Eligibility Specialist. All childcare requires a childcare timesheet signed by the student and childcare facility staff to ensure that all billed times and dates are accurate. Student transportation requires an attendance sheet documenting his/her attendance and must be signed by the participant and the instructor to be payable. The current pay rate for student transportation is \$3.00 per approved day up to a maximum of \$15.00 per week for all students. The exceptions are students attending Alabama Coastal Community College who receive \$4.00 per approved day up to a maximum of \$20.00 per week. Students in the Correctional Officers/Law Enforcement programs that must attend some weekends will receive the stated \$3.00 per approved day with a maximum of capped \$20.00 per week.

10. All Career Advisors and Support Service staff will adhere to procurement guidelines as established by the CareerSource Escarosa for support services. All support services will be entered into EF by the Career Advisor upon approval from the Eligibility Specialist.

11. The Eligibility Specialist will submit monthly reports to the Chief Operating Officer (COO) and Accounting Department

recapping WIOA childcare services, and a full report annually on all support services.

12. Documentation of all support services provided to a participant will be maintained in the participant's case file. The documentation must include the recipient's name, the support service provided, and the date the service was delivered. The participant and Career Advisor must sign and date the form acknowledging the receipt of the service.

13. All support services will be recorded in the EF system utilizing the appropriate support services codes based on the service/activity assigned to the participant, please refer to the Employ Florida Service Code Guide. The Career Advisor must document the service provided (books, supplies, uniforms, etc.) in the "comment" box of the activity record. The support service dates recorded in EF will begin and end on the dates equal to the start and end dates of the Occupational Skills Training (OST) dates, unless a Support Services Action sheet was used. If a Support Service Action sheet is used, the "effective" dates recorded on the form should be the dates approved in EF.

C. CATEGORIES FOR SUPPORT AND TRAINING RELATED SERVICES

1. Tools, Equipment and Supplies

- a. Hand tools
- b. Medical and Dental training supplies/kits
- c. Uniforms
- d. High technology purchase (Case by Case basis)
- e. Film to include black and white or color
- f. Specialized equipment for handicapped individuals
- g. Procedures

2. Health Care

- a. Physicals
- b. Immunizations may include hepatitis B series, or rarely a chest X-Ray
- c. Background Checks and Drug Screening
- d. Procedures

3. Special Licensing, Required Testing

- a. CDL/Chauffeur, CPR, Arnett testing, State and National Boards
- b. Other required license
- c. Procedures

4. Transportation (local and out of town)

- a. Bus Tickets
- b. Transportation allowance
- c. Procedures

5. Child Care Assistance

- a. Licensed FDCF Childcare facility
- b. Child Care Provisions
- c. Registration Fees
- d. Procedures

6. Temporary Shelter Assistance and Food Assistance

- a. Out of Area Training shelter and food assistance
- b. Procedures

7. Relocation Assistance, Out of Area Job Search Assistance

- a. Relocation Assistance (Dislocated Worker only)
- b. Out of Area Job Search (Dislocated Worker only)
- c. Procedures

8. Other Support Services and procurement

D. SUPPORT SERVICES PROCEDURES

Tools, Equipment and Supplies

- a. Only hand tools required for completing approved training.
- b. Uniforms to include shoes, watch, hat/caps, lab coats.
Patches for Correctional officers training only.
- c. Medical supplies to include, dental kits, nursing equipment, and computer repair kits.
- d. Specialized equipment for disabled individuals. This is considered a support service, not a training related need. Adaptive equipment may be provided to enable a participant to participate in an activity for employment or classroom training i.e. (enhanced stethoscope). Whenever possible, agencies which specialize in providing this type of support shall be utilized first (Division of Blind Services, Vocational Rehabilitation, or Hearing-Impaired Agencies).

Procedures

- 1. Documentation must be obtained by the participant from the training site or employer which verifies that the terms requested are required to participate in the training activity or to become employed; that the requirement applies to all students/employee, and that the items are not supplied by the

training site or employer. The only exclusion is the disabled participants.

2. All items to be purchased with CareerSource Escarosa dollars must have prior approval before any purchase may be made by any participant. The Career Advisor will determine the required need. A client action sheet and supporting documents must be forwarded to the Eligibility Specialist for review and final approval. A letter of authorization/voucher will be issued to the participant to take to a particular vendor for purchases. On some occasions a vendor is not on the support service vendor list or does not accept a letter of authorization/voucher. In those cases, reimbursement is permitted but, the purchase must still be pre-approved by the Career Advisor.

3. CareerSource Escarosa will not be responsible for any items not listed on the letter of authorization/voucher. Because of location the north end does not have expediency in receiving vouchers. Therefore, the Career Advisor in that area is authorized to issue all letters of authorization except for tools.

4. The vendor ensures that the participant signs his/her invoice before mailing it to the Eligibility Specialist to process for payment. All invoices involving a letter of authorization/voucher, regardless of Career Advisor involvement, are routed to the Eligibility Specialist to process. All invoices will be processed in accordance with standard accounting procedures.

5. All purchases are the property of CareerSource Escarosa. If a participant drops out of training/employment he/she must return all items purchased within 30 days of the last day of training/employment. The purchased items become the property of the student/employee 90 days after successful

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completion of training or 90 successful days of unsubsidized employment. Confiscated items, if usable, are redistributed to other participants in the same area of study/work. If not usable they are discarded. Discarded items are described as items that are broken or unsanitary (dental floss, paper gowns, dental instruments that cannot be sterilized).

6. CareerSource Escarosa will pay for required training items one time only. CareerSource Escarosa will not replace lost, broken or stolen items.

7. CareerSource Escarosa will not be responsible for the purchase of pens, pencils, paper, composition books, notebooks, or other perishable miscellaneous supplies for training activities. The exception to this is in specialized training. (graphic, multi-media etc).

Health Care

a. Physicals examination, required immunizations, may on occasion include updated shots or a Chest X-Ray

b. Background Checks, Drug/Substance Abuse Screening.

Note: The above items may be provided by Career- Source Escarosa if they are required by the training site/employer and are required for all students/employees and are not provided from any other source.

Procedures

1. The participant must provide documentation from the training site or employer to verify that the physical, drug screening, immunizations or background checks are required. This information is provided to the appropriate Career Advisor.

2. The Eligibility Specialist, and in some cases the Career Advisor, approves and or initiates a letter of authorization/voucher for the WIOA Participant. Participant needs are identified via client action sheet and supporting documents. The letter of authorization/voucher specifies the service to be provided by the medical provider. CareerSource Escarosa is not responsible for additional services provided by the medical provider that have not been approved by the Eligibility Specialist or the designated Career Advisor.

3. All vendor invoices will be approved for payment by the Support Services Specialist. Payments will be made in accordance with standard accounting procedures.

Special Training Related Licensing

a. CDL (Drivers/Chauffeur), CPR, RN, LPN, State and National exams, Dental Hygiene, Radiography

b. Other Required License and Exams.

Note: This may be a license not requiring an examination (i.e., Security Guard, etc.) but which is required for employment or training.

Procedures

1. Any license and state or national exams for certification or licensure required for training or employment may be sponsored by CareerSource Escarosa. The participant must document the need for the certification/license (noted within the curriculum or specialized training materials) or as documented by the employer.

2. CareerSource Escarosa will be responsible for reimbursement to the WIOA participant only if he/she is successful and passes the exam for certification or licensure.

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3. The participant will need to document the successful completion of the exam by providing test scores or a copy of actual certificate or license. To be reimbursed, proof of payment/s must be provided (i.e., photocopy of check, money order or credit card/bank statement). All statements must include the name of the licensing entity, date of payment and the amount paid. Proof of payment must be given to the appropriate Career Advisor who shall then forward a client action sheet and all supporting documents to the Eligibility Specialist to process for payment.

4. The Eligibility Specialist must approve all requests for payments reimbursed and/or fees which shall be processed in accordance with standard accounting procedures.

5. Temporary Shelter Assistance (Support Service)

Transportation (local):

1. Bus Tickets/Passes:

Bus tickets/Bus passes may be issued to students who are enrolled in an approved occupational skills training activity, youth activity, or work activity (i.e. initial period of unsubsidized employment following training and not continuing beyond the date on which the participant receives his/her first pay check and OJT.

Tickets/passes are generated by an action sheet and supporting documents by the Career Advisor requesting the tickets/passes for a participant. The Eligibility Specialist calculates the amount needed, places the order, requests a check from the Accounting department, picks up the tickets and distributes them to the Career Advisor on an as needed

bases. A bulk amount of tickets are purchased and each distribution is signed for by the Career Advisor and a bus ticket log is maintained by the Career Advisor for the tickets they disburse to the participant. A report of the disbursements is given to the Eligibility Specialist on a monthly basis. The reports are reconciled and maintained by the Eligibility Specialist and reported annually.

2. Transportation Allowance:

For local travel (any travel within Escambia and Santa Rosa Counties) participants are reimbursed at a rate conducive to the rise in gasoline prices. The transportation allowance is \$3.00 per approved day and a maximum of \$15.00 per week. Because of extensive travel to and from Alabama Coastal Community College the rate of transportation is \$4.00 per approved day at a maximum of \$20.00 per week.

Correctional/Law Enforcement students who have extended classes to include weekends will receive the \$3.00 per day rate with the maximum capped at \$20.00 per week. Extenuating circumstances may alter these amounts. All documents must be attached to the initial request for transportation this includes CLINICAL SCHEDULES. If a clinical schedule is not made available at the time of signing up for transportation a client action sheet must accompany the schedule and will be effective the date the schedule is actually submitted, there will be no going back to recalculate transportation for late clinical schedule. We will only pay for the actual time frame in which the schedule was received and forward. NO BACKDATED DOCUMENTS WILL BE ACCEPTED. All transportation allowance is verified by attendance sheets showing the days and times of attendance. All attendance sheets must be signed by participant and instructor/employer. Only original signatures will be payable.

3. Community Transportation:

Arrangements will be made, for those with disabilities, with whatever company is providing the services at that time. The Career Advisor will make the determination and submit an action sheet with proper supporting documents to the Eligibility Specialist. Once approved by Career Source Escarosa arrangements will be made.

4. Out of Area:

CareerSource Escarosa sponsors training activities outside of the Escambia and Santa Rosa County areas on a limited basis. If the participant is sponsored with out of area travel he/she will be reimbursed in accordance with Career Source Escarosa training site specific policy or current mileage rates as documented through odometer readings and noted on the Travel Voucher and/or State mileage charts/maps. Out of area transportation assistance shall be approved by the CareerSource Escarosa. An action sheet requesting out of area travel will be submitted to the Eligibility Specialist who will seek administrative approval, then process in accordance with standard accounting procedures.

**Note:* All transportation support services must be identified during the interviewing process and should be noted on the participant's Individual Service Strategy (ISS).

Child Care Assistance: (Support Service)

1. FDIC License: Childcare supported by CareerSource Escarosa must be provided through a childcare facility that is licensed/registered by the Florida Department of Children and Families. Any Faith based childcare must be a separate entity

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from its base church and must prove separation of church and state. CareerSource Escarosa funds cannot be expended on the construction, operation, or maintenance of any facility that is used or will be used for sectarian instruction or as a place of religious worship. The only exception to the childcare policy is: Childcare in northern Escambia and Santa Rosa Counties, Florida due to limited availability of childcare providers can use alternative childcare which DOES NOT include church based childcare providers of any religious order as the alternative.

2. Child Care Provisions: Participants needing assistance in childcare must meet at a minimum the following requirements. Be enrolled in classroom training activities or enrolled full-time in OJT. Full time classroom training shall be defined as 9 college credit hours or more at a junior/community college, or as attending 20 hours or more a week at vocational/technical center. Full time OJT shall be defined as working more than 30 hours during a work week. Entering a Co-op program upon completing classroom training, childcare can be paid at 50% for the first 30 days of Co-op, 30% for 31 to 60 days and 20% for 61 to 90 days. No childcare will be paid for Co-op after the 90 days has expired.

3. Children for which childcare will be provided cannot be enrolled in school (to include kindergarten) and must be a minimum age of 6 months old. Participants who are locked into training programs which require evening childcare may receive assistance, if funding is available.

4. Registration: CareerSource Escarosa will be responsible for one registration fee per fiscal year (July 1 to June 30 of the following year).

5. School breaks and Holidays: Escarosa will pay to hold an authorized childcare spot for up to, two weeks for Christmas

break and one week for Spring/Fall break for returning students only.

Procedures:

The following procedures shall be followed to secure childcare assistance for eligible participants. All Career Advisors are supplied a childcare list of childcare facilities, and their license status, by the Support Service Specialist at least twice per fiscal year.

1. The Career Advisor will determine need of services which shall be explained on the ISS/IRP. After justifying a need, the Career Advisor will request childcare via client action sheet and supporting documents. All documents must be dated when all back-up documents are attached and all forms signed, there must not be any backdating of any documents. The request is forwarded to the Eligibility Specialist for over site and processing. Making sure that the facility chosen is duly licensed, maintains separation of church and state requirements, and is in good standing with CareerSource Escarosa. Also making sure that the child/children's ages are within the age limitations set. Prior to approval of childcare support services, the participant will review and sign the Child Care Assistance Policy.

2. If the participant is attending classroom training activities, he/she must provide the Career Advisor with documentation to verify class days and childcare needs. The Career Advisor must be provided a class schedule to include any clinical schedules and a statement of need). The Career Advisor has the option to allow additional childcare services for study times, library research projects, labs and other training related factors needed for the participant to be successful in the training

activity. In the case of OJT, the Career Advisor must be provided a proposed work schedule if day care is needed.

3. The Career Advisor shall initiate a client action sheet, class schedule/work schedule, statement of need form, childcare policy agreement, childcare time sheet and childcare authorization form. Both Career Advisor and participant must sign appropriate documents. The original timesheet and a copy of the childcare authorization are to be sent directly to the childcare facility. A copy of all documents is forwarded to the Eligibility Specialist for processing of childcare payments and to resolve any issues. The Eligibility Specialist shall ensure that a current copy of each childcare provider's license/registration, rates, fees and payment policies are kept on file.

4. The childcare facility staff or the participant shall be responsible for completing one childcare time sheet per week. Both the participant and childcare employee must sign the timesheet to verify attendance and rates (only original signatures will be accepted).

5. The childcare facility may mail or deliver timesheets to the Eligibility Specialist to process for payment. The Eligibility Specialist is required to approve all payments. The childcare time sheets will be processed in accordance with standard accounting procedures.

6. Participant attendance records with regard to childcare are kept by the Career Advisor to determine if the participant is complying with the terms in the childcare assistance policy and to determine if the participant is attending scheduled classes. The Career Advisor will inform the Eligibility Specialist of any schedule changes via client action sheet.

7. If CareerSource Escarosa withdraws financial support for Child Care Services for a participant attending classes, the Eligibility Specialist will notify the affected childcare facilities by letter, whenever possible, no less than two weeks prior to withdrawal of support. If the participant is not attending classroom training or has dropped out of training, the childcare center will be notified immediately by telephone and services will end on that day. A follow up letter will be mailed based on the telephone conversation.

8. The percent/rate of childcare payments shall be made in accordance with the CareerSource Escarosa's childcare rates based on current funding and economic conditions of the times. Childcare increases requested by the Eligibility Specialist based on a trend of increases throughout the childcare industry and are approved by the Executive Director. Current childcare rates based on the child's age are as follows: For a child 6 months to 12 months, the maximum amount is \$130.00 per week; from 13 months to 24 months, the maximum amount is \$120.00 per week; and from 25 months to 5 years old, but not yet in school, the maximum rate is \$115.00 per week. These rates are subject to change. In order to pay childcare for a 5-year-old child, the child must not be able to attend kindergarten because he/she turned 5 years old after the cutoff date of September 1st of that year. The Eligibility Specialist negotiates with the childcare providers to take advantage of any and all discounts that may be available to CareerSource Escarosa. The exception to these rates is for Co-op and OJT. For which CareerSource Escarosa will pay 50/30/20% of its rates respectively.

Note: ALL CHILD CARE SERVICES MUST BE IDENTIFIED DURING THE INTERVIEWING PROCESS AND SHOULD BE NOTED ON THE PARTICIPANT'S ISS.

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Relocation/Out of Area Job Search Assistance (Dislocated Worker only)

a. Relocation assistance may be provided to dislocated eligible participants if employment is obtained outside a 100-mile radius of Escambia or Santa Rosa Counties. Financial assistance will not exceed \$1,000.00 per individual and will not exceed 90% of the total moving cost.

b. Out of Area Job Search Assistance may be provided to dislocated eligible participants if possible, employment may be obtained outside a 100-mile radius of Escambia or Santa Rosa Counties. Career Advisors will verify that the participant has a job interview by a collateral contact call or written documentation of the intent to hire from a potential employer. Once determined that an actual interview exists, assistance may be provided. Assistance will not exceed \$800.00 per individual.

Procedures

1. Prior approval must be obtained by the participant from the Career Advisor before any assistance is permitted.
2. The participant must provide the Career Advisor the name of the employer to include his/her address, phone number and contact person.
3. The participant must provide documentation regarding the position, hourly wage and job duties. For relocation assistance the participant must also provide the date employment will begin.

4. Documentation for all reimbursements must include a receipt for expenses and/or estimated cost on business letterhead to verify relocation cost.

5. All expenses for relocation assistance must be with established businesses and cannot be for employing family members or personal acquaintances.

6. Reimbursement will occur through client action sheet and supporting documents forwarded to the Eligibility Specialist. And will be processed according to standard accounting procedures.

Other Support Services

Shelter: (Needs based) Housing assistance through the payment of rent or mortgages may be made if a participant is at the point of having to drop out of school or work activity. A request for shelter assistance is initiated by the participant's written statement of need and updated financial statements. The Career Advisor after reviewing the statement of need and verifying the monthly rent/mortgage amounts with the landlord/mortgage company. The Career Advisor will update the ISS/Reemployment Plan and prepare a client action sheet and supporting documents to forward to the Eligibility Specialist. The Eligibility Specialist will consult the Chief Operating Officer (COO), and/or Chief Executive Officer for final approval. A participant's financial needs must be predetermined each semester for training activities or once every three months for work activities. Assistance cannot exceed 12 consecutive months in this area. In addition, needs based support services may include payments for utilities (electricity, water, sewage/garbage, gas and basic telephone). Long distance phone service, cable, and internet services will not be covered.

Other: Other support services may be provided based on participant need. This may include eyeglasses, dental and medical care, automobile repair, etc. Needs are determined on an individual basis and will be noted in the participant's folder. A request for assistance is initiated with the participant statement of such need, and an updated financial report. The Career Advisor will justify the need, and he/she will coordinate with the Eligibility Specialist. The Eligibility Specialist will seek approval from the Chief Operating Officer (COO) and/or the Executive Director to provide the assistance required.

Procedures:

The Eligibility Specialist will procure the vendor/s to supply the above services based on individual items or services needed. CareerSource Escarosa, in dealing with participants, does not always have the doctors or healthcare facilities that will provide the above needs in the time frame the participant may need them, or, the provider may not be willing to accept our participants at all. Therefore, Vendors will be obtained on an as needed basis. CareerSource Escarosa does work with a local doctor who will work the WIOA participants into daily appointments based on participant needs and timelines. The local doctor will also invoice for services rendered.

CareerSource Escarosa utilizes the Escambia and Santa Rosa Health Departments respectively. When possible, CareerSource Escarosa will obtain three oral quotes for services and/or three written quotes depending on estimated cost. If for some reason a health care need is approved by a Career Advisor and the participant must use a provider not approved by Career Source Escarosa, the required service may be reimbursed at the equal or similar rate Escarosa pays a provider for the same services.

Procurement of Support Services and Training-Related Services:

Child Care

CareerSource Escarosa does not contract with childcare providers for a specific number of slots. WIOA participants choose a facility in accordance with the following rules.

1. The participant chooses a facility that he/she will be happy with and where he/she feels safe in leaving their children. The participant is supplied a support service childcare list to aid in the choices.
2. The childcare list is maintained by the Eligibility Specialist. The providers have been screened to make sure they are FDCF licensed/registered. (Some exceptions apply to the areas with limited or no access to childcare providers).
3. The Childcare provider must provide CareerSource Escarosa with a copy of current license/registration and childcare rates.
4. CareerSource Escarosa will allow the maximum childcare payment rates (rates may change due to economic changes).

* (6 months to 12 months) \$ 130.00 per week

* (13 to 24 months) \$120.00 per week

*(25 months to 5 Years and not yet enrolled in school) \$115.00 per week

Note: The childcare provider should be in the general area of the participant's residence or training site. CareerSource Escarosa prefers to use a childcare provider which operates within the above rates. However, if a participant selects a more expensive center then he/she is responsible for the remaining childcare expenses.

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Transportation

1. Participants of Escambia County may use the public transit system. CareerSource Escarosa provides bus tickets/passes to individuals who do not drive and who are eligible to receive transportation support. Escambia and Santa Rosa County participants who have transportation (automobiles) may be provided from \$15.00 to \$20.00 per week transportation allowance. These figures are based on need and location.
2. CareerSource Escarosa may assist participants with automobile repair if the vehicle is needed for training. The participant must be without access to public transportation and family members cannot provide transportation. The participant must document the need for assistance, be involved in a WIOA approved training program, and must meet CareerSource Escarosa's guidelines for that training component. The participant must provide his/her Career Advisor with three written quotes on automobile repairs. The Career Advisor then makes a decision regarding CareerSource Escarosa assistance, coordinating with the Chief Operating Officer as required. Once approved, this process shall be applied to WIOA.

Note: All licensed automobile mechanics/businesses can provide estimates for automobile repairs. The lowest bidding vendor will be utilized.

Books

CareerSource Escarosa does not purchase books in bulk supply. Individual books are purchased at the time the participant is approved for a specific training program, registered, and begins training. CareerSource Escarosa works

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with community book suppliers supporting all our educational institution training programs. Our major suppliers are listed below.

1. The Pensacola State College (PSC) E Follett Bookstore, which is used for participants attending PSC if possible. The PSC bookstore has a computerized accounting system and only supplies books required for the student's area of study. Books are matched to classes and are approved by the PSC WIOA Coordinator. Currently if books are available for rent the student will rent the books and will return them at the end of the semester. The student is responsible for turning in the books and any fees associated with not returning the books as indicated in the contract with the bookstore.

2. Lemox Bookstore is used for participants attending George Stone Technical Center (GS) and Locklin Tech and may be used by all students when book purchases are required. GS and Locklin Career Managers are responsible for coordinating required book purchases with the Eligibility Specialist. Those requests are invoiced and sent to the Eligibility Specialist for processing and payment.

3. Alabama Coastal Community College bookstore is the only known bookstore in the Atmore/Brewton, Alabama area. Books are matched to the requirements of the course work and are invoiced through a computerized accounting system. The Career Advisor for Alabama Coastal Community College is responsible for coordinating book requirements to ensure accurate purchases and invoices.

4. All bookstores which provide the required books may be utilized if price ranges are comparable to the main vendors.

Uniforms

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1. Career Source Escarosa works with many uniform vendors. They are Bosso's Uniforms, Inc., PSC Bookstore, Ruth's Uniform Shop, and Uniformly Yours. Any one of these vendors will serve the WIOA participants uniform needs and in some cases supplies as well.

2. All uniform retailers which provide the uniforms required for approved training areas are utilized if the prices are within the Career Source Escarosa approved ranges.

*Medical related

*Correction Officer

*Culinary Arts

Note: Price varies depending on size requirements and may change based on economic factor. Any increases will be approved by the Career Source Escarosa Chief Operating Officer (COO), or Executive Director.

Tools

1. Career Source Escarosa utilizes a variety of vendors for tools/supplies. These include but are not limited to: PSC Bookstore; The Home Depot; Johnstone Supply; Office Depot; Office Max; Penko; Radio Shack; Sears; Tech Advanced Computers to name a few. Purchases are made according to availability and price.

2. Career Source Escarosa will not exceed \$1,500.00 per participant in the purchase of required tools.

3. All vendors who provide tools for approved training programs will be utilized as long as their prices are within the above range.

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4. Career Source Escarosa will not purchase any power tools.

Health

1. For most physical examinations Career Source Escarosa utilizes Dr. Lucey of Pensacola, Florida. This is because Dr. Lucey agreed to take participants on short notice (1 day or less) and is reasonably priced. Dr. Lucey will also administer immunizations if necessary. WIOA participants may use Dr. Lucey or a doctor of their choice if prices are comparable. Career Source Escarosa works with those doctors regarding the billing/account process, participant needs, appointment scheduling and documentation requirements.

2. The Escambia and Santa Rosa County Health Departments respectively do not provide physicals but do offer immunizations/vaccinations. Those facilities are utilized as needed.

3. All health care facilities that provide physicals, drug/substance abuse testing, immunizations, etc. may be utilized if the prices are within comparable ranges.

CHAPTER 10. ABBREVIATIONS

ADA Americans with Disabilities Act

BRAC Base Realignment and Closure

CDL Commercial Driver's License

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CPR	Cardiopulmonary Resuscitation
CHS	Children's Home Society of Northwest Florida
CA	Career Advisor
CM	Case Manager
DD214	Defense Department Form 214 - document of the United States Department of Defense, issued upon a military service member's retirement, separation or discharge from active-duty military.
DCF	Department of Children and Families (State of Florida)
DEO	Department of Economic Opportunity
DJJ	Division of Juvenile Justice (State of Florida)
DPN	Disability Program Navigator
DTAA	Department of Trade Adjustment Assistance
EF	Employ Florida
EWT	Employed Worker Training
FAFSA	Free Application for Federal Student Aid
FDIC	Federal Deposit Insurance Corporation
FL	Florida
GED	General Equivalency Degree

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IEP	Individual Employment Plan
ISS	Individual Service Strategy
ITA	Individual Training Accounts
LLSIL	Lower Living Standard Income Level (Poverty Guidelines)
LPN	Licensed Practical Nurse
NEG	National Emergency Grants
NAFTA	North American Free Trade Agreement
O'NET	Occupational Information Network
OJT	On-The-Job Training
OST	Occupational Skills Training
PSC	Pensacola State College
RA	Re-Employment Assistance
REACT	Reemployment and Emergency Assistance Coordination Team (Florida's Rapid-Response Unit)
RFP	Request for Proposals
RN	Registered Nurse

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SSI	Supplemental Security Income
SSN	Social Security Number(s)
SSDI	Social Security Disability Income
TAA	Trade Adjustment Assistance
TABE	Tests for Adult Basic Education
TANF	Temporary Assistance for Needy Families
TDD	Telecommunications Device for the Deaf
TTY	Teletypewriter
UC	Unemployment Compensation
UI	Unemployment Insurance
VLC	Virtual Learning Center
VRS	Video Relay System
WARN	Worker Adjustment and Retraining Notification Act
WIOA	Workforce Investment and Opportunity Act
WP	Wagner-Peyser Program

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