


ONE STOP OPERATOR/FISCAL AGENT ISSUANCE 2001-08, Modification 26

REVISED DATE: December 29, 2015
ORIGINAL ISSUANCE DATE: December 18, 2001
TO: Missouri Career Center and Sub-contractors
FROM: Clyde McQueen, President/CEO 
SUBJECT: Needs Based Payments and Supportive Services for WIOA Dislocated Worker and WIOA Adult Program
EFFECTIVE DATE: July 1, 2015

BACKGROUND: This issuance is based on the Workforce Investment, the final WIOA Regulations issued August 11, 2000, DWD Issuance 12-2010 Statewide Supportive Services Policy, and FEC policy.

ACTION: FEC staff and contractors should add this issuance to their Policy and Procedures Manuals. *This issuance replaces issuance 2001-08, Modification 25.* The President/CEO or his designee must approve any deviations from this policy in regards to maximum amounts available. Supportive service and retention payments are subject to fund availability and resources.

QUESTIONS: If you have any questions regarding this process, please contact Richard Salazar 521-5700, ext. 3266, Andrea Robins 471-2330, ext. 1255 or Sandra Walker at 471-2330, ext. 1279.

General Description: All supportive services must be based on documented need by the customer – the customer must be in need of the support service in order to continue training or to retain employment. The need for support services should be documented in each customer's Individual Employment Plan **and in Toolbox Service Notes. The Financial Needs Tab in Toolbox must be completed to determine the customer's need.** This issuance establishes the categories of support services and the maximum amounts available. Funds **WILL NOT** be used to pay for child care, auto repairs, utilities or rent, penalties, restitution, taxes, or bad debts or incentive payments for adults and dislocated workers.

Referral to Other Agencies for Supportive Services: Only supportive services, which cannot be provided by the customer themselves or through other agencies that provide these services, will be submitted for approval for payment through FEC. Documentation of referral to other agencies must be included as a case note in the Toolbox Service Notes. The Toolbox service referral tab will be used to refer customers to other agencies, which provide supportive services needed, by customers.

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All Supportive Services must be documented in Toolbox and include at a minimum all of the following:

- The type of Supportive Service paid
- The amount of Supportive Service paid
- The timeframe the Supportive Service was paid for
- The justification of need for the Supportive Service; and
- Lack of other community resources.

See DWD issuance 12-2010.

I. SUPPORTIVE SERVICE POLICY

Supportive Services are defined as those services, which are necessary to enable an eligible customer to participate in employment and training activities, and are available to WIOA registered customers participating in employment and training activities. Supportive services may be provided to customers pre- or during employment.

A. Need Determination: The need for supportive services is identified by the Career Development Executive based on individual one-on-one interviews with the customer conducted as part of assessment. Supportive service payments enable customers to successfully complete employment programs. The need for the supportive service must be documented in the customer's EP and as a case note in Toolbox Service Notes. The Financial Needs tab in Toolbox must be used to determine customer need. The Initial Financial Needs need to be placed in the enrollment prior to enrollment.

Sample Assessment of Need: When assessing the customer's need for transportation assistance, the following questions should be asked, at a minimum, by the CDE:

1. What is the customer's mode of transportation? Can they benefit from obtaining a bus pass? *Individuals who receive bus passes are not eligible to receive gas transportation assistance. *The CDE and customer should develop a transportation strategy plan prior to participating in employment or enrolling in classroom training.*
2. How many days per week is the customer scheduled to work or to attend training? *Transportation assistance will only be given for scheduled work or training days.*
3. After a determination has been made by the CDE as to which transportation assistance the customer selects (monthly bus pass or gas transportation assistance), the following steps should be taken:
 - Each customer should receive a COT orientation at least one week prior to the start of training.
 - Discuss with the customer the type of transportation assistance they will receive and the amount.
 - Give the customer a Classroom Attendance Timesheet and an explanation on how it is to be completed and signatures needed.
 - Provide the customer with a participant payroll schedule and dates timesheets are due to the CDE.
 - Underscore that job placement assistance is available through the American Job Center and FEC.

B. Eligibility: Supportive services may be provided to customers who have been determined as eligible for Individual Career Services and training services if the need has been documented and the supportive service cannot be provided through another agency. This must be case noted in Toolbox.

C. Referral to Other Support Service Providers: The Toolbox service referral tab will be used to refer customers to supportive services not available through FEC. Staff will utilize the United Way 211 to view the list of supportive services available to customers, and make referrals from the list of providers. The list of supportive services can be accessed at www.211.org. Searches can be performed via County or Location/Provider/Service. The "Make Referral" key must be selected and a print out of the service provider can be obtained.

D. Maximum Amount: The maximum amount of supportive services that a customer may receive during an enrollment period is **\$500**. This amount may only be exceeded if the need is determined and if approved by the FEC President/CEO or his designee.

E. Supportive Service Categories:

1. Transportation:

a) Employment/Training Customers: Customers enrolled in work experiences, or on-the-job training, or placed in unsubsidized employment may receive transportation assistance for up to 30 days or until receipt of first paycheck.

- **Bus Passes:** Bus passes may be issued to customers during the first 30 days of employment; during job search, and or during other circumstances as approved by the Manager. Bus passes can be extended every 30 days up to 90 days with Manager's approval.
- **Gas Cards:** Gas Cards may be issued to customers who have obtained full time employment, work experience, or on-the-job Training for up to 30 days or until receipt of first paycheck. Cost may not exceed \$25 per week for up to 2 weeks. The need for gas cards must be documented in Toolbox case notes and Individual Employment Plan.
- *Persons who receive Gas Cards are not eligible to receive a bus pass.*

b) Classroom Training Customers: Customers enrolled in a non-wage paying Classroom Occupational Training programs are eligible to receive transportation assistance during the period of the classroom skill training up to the Maximum Amount.

- **Bus Passes:** Bus passes may be issued to customers to attend training. Bus passes can be extended every 30 days for the duration of the training program with Manager's approval.
- **Transportation Assistance (customers enrolled in classroom training):** Costs may not exceed \$25 per week and will be issued in the form of a gas card.

- Customers enrolled in COT must submit a classroom attendance timesheet to the Career Development Executive bi-weekly on the designated days with both the customer and the instructor's signatures.
- Customers will not receive transportation assistance on days not scheduled to attend class or during school hiatus, i.e., Christmas Break or Spring Break, etc.).
- ***Persons who receive Transportation assistance are not eligible to receive a bus pass.***

c) Customers Not Enrolled in WIOA: Customers not enrolled in WIOA at the individualized career services or training services level may NOT be issued WIOA funded supportive service payments.

2. **Work-related clothing, tools, and equipment:** Customers may request work-related clothing, tools, or equipment identified by an employer as necessary for the job. Customers may also request clothing needed for classroom occupational skill training.

Unless approved by the President/Designee, no more than 5 days of clothing should be approved for a customer including the following. As needed by customer.

- 5 tops/shirts/blouses/sweaters
- 5 pants/jeans/slacks/skirts
- 1 pair of shoes
- 1 package of socks or hosiery
- 1 package of underwear
- 1 package of undershirts (white t-shirts)

Life Uniforms: Limit of 1 item per required medical equipment, and no more than 5 days of clothing. As needed by customer.

- 5 scrub tops
- 5 scrub pants
- 1 lab coat
- 1 pair of shoes
- 1 package of socks or hosiery
- 1 package of underwear
- 1 package of undershirts (white t-shirts)

3. **Relocation or Out-of-Area Job Search (Dislocated Workers Only):** A maximum of \$500 will be provided to ***Dislocated Workers*** for out-of-area job search costs and/or for relocation expenses, subject to fund availability. Relocation expenses will be paid if it is necessary for the customer to relocate in order to accept a job outside of the Kansas City & Vicinity or East Jackson County Workforce Development Areas and/or the Kansas City Metropolitan Statistical Area (Cass, Clay, Platte, Ray and Jackson Counties in Missouri and Wyandotte, Johnson, and Leavenworth Counties in Kansas). Out-of-Area Job Search assistance will include transportation (mileage or air fare) to interview for jobs outside of the Kansas City & Vicinity or East Jackson County Workforce

Development area and/or Kansas City Metropolitan Statistical Area which exceed a distance of 150 miles one-way.

- F. Training and Employment Related Testing and Required Fees Category:** Employment related testing may include physicals, TB tests, drug screens, or other tests required by employers. **Maximum amount is \$50.** Training and Employment Related Required Fees may be used for mandatory examinations fees, certification fees, background and fingerprinting expenses required by the State for licensing or licensing for national certification. **Maximum Amount is \$500.**

II. POST-EMPLOYMENT SERVICES FOR JOB RETENTION

Transition to Placement Support:

WIOA enrolled Adults and Dislocated workers at the individual career services level and training levels of service, who are placed in full-time unsubsidized employment (32 hours per week), are eligible to receive \$100 in transition to placement to facilitate their placement and retention in unsubsidized employment. Must be based upon documentation of need and noted in Toolbox. Transition to Placement Funds is a supportive service payment distributed to customers to help them retain employment. Internship, work experience and on-the-job training customers cannot receive transition to placement funds since they receive wages while in training prior to their placement in unsubsidized employment. *Maximum amount is \$100.*

III. PROCESS FOR REQUESTING SUPPORTIVE SERVICE PAYMENTS

The processes described below will govern the application for and distribution of Supportive Service Payments:

- **Statement of Need Documented in Toolbox and Employment Plan (EP):** FEC staff/Contractor will describe, in detail, the need for the support service and shall document the need in both Toolbox Service Notes and the customer's EP, which identifies the customer's employment goals, achievement objectives and appropriate combination of services to achieve these employment goals. The support services must be necessary to achieve the goals outlined in the EP. Toolbox Service Notes must include at a minimum **all** of the following: the type of supportive service, the amount of supportive service paid, the time frame the supportive service was paid, the justification for the supportive service and the lack of community resources. A letter from the employer indicating the customer's need for work-related items is to be attached to the supportive service requests for work-related clothing, tools, equipment, etc. *Exception: Work-related clothing that is not required by an employer, but necessary for employment, does not need to be accompanied by an employer letter.*
- **Cash Payments:** Checks will NOT be made payable to customers (*EXCEPTION: \$100.00 transition to placement payment*).
- **Distributing Supportive Service Payments to Customers:** The assigned FEC CDE will contact customer when supportive service payments are completed and ready for distribution. FEC staff/Contractor will contact customers in regards to designated check

pick-up times. It must be case noted in Toolbox that the customer received the supportive service (see DWD Issuance 12-2010).

- **Bus Passes:** The “1 Ride Pass Agreement” or “Monthly Pass Agreement” must be completed for bus passes (see attachment).
- **Supportive Service Request Form:** A “*Supportive Services Request*” ETO Touchpoint must be completed to request supportive services or Retention Funds for Employment Support.
 1. FEC staff/Contractor will document customer information, program type and activity.
 2. FEC staff/Contractor will document vendor information where items are to be purchased and, in the center box, document quantity, description and cost of item(s) requested.
 3. **Wal-Mart:** Wal-Mart has been selected as the designated vendor through a voucher agreement and should be utilized first, if possible, for clothing other than uniforms, shoes, approved work-related tools, etc. Customers will be issued a voucher made payable to Wal-Mart for a designated amount and which will expire in 30 days. Wal-Mart will bill FEC for the amount of purchase, and provide a description of items purchased for each customer. The customers will not be issued a receipt, so they may NOT return the merchandise for cash. Other vendors may be used as needed.
 4. **Three 3 Bids:** When a vendor other than Wal-Mart is utilized and the purchase amount will exceed \$500, FEC staff must document the cost from three 3) vendors.
 5. **Signatures:** FEC Staff/Contractor must sign in designated area at bottom of form. Contractor will forward to assigned FEC CDE who will review, sign, and submit to management for approval.
 6. **Processing Time:** The average processing time for a supportive service request is 5 working days; however, a maximum of 10 working days should be allowed for the processing of Supportive Service requests.
 7. **Documentation:** The following checklists will be followed when submitting requests for support services to Fiscal.

CLOTHING (TOOLBOX CODE 4003)

- Supportive Services ETO Touchpoint print out
- Toolbox Service Notes documenting need
- Toolbox Closure Screen
- Toolbox printout of Financial Needs Assessment
- Proof of Employment or Program Participation (i.e. timesheet, job search log, training plan, verification of employment, or pay stub)
- Itemized list of clothing to be purchased. No more than 5 business days supply of clothing:
 - 5 tops/shirts/blouses/sweaters
 - 5 pants/jeans/slacks/sweaters
 - 1 pair of shoes
 - 1 package of socks or hosiery
 - 1 package of underwear (white t-shirts)

UNIFORMS (TOOLBOX CODE 4003)

- Supportive Services ETO Touchpoint print-out

- Toolbox Service Notes documenting need
- Toolbox Closure Screen Toolbox printout of Financial Needs Assessment
- Proof of Employment or Program Participation (i.e. timesheet, job search log, verification of employment or pay stub)
- Copy of Life Uniforms Voucher. Limit 1 item per required medical equipment. No more than 5 business days supply of clothing:
 - 5 scrub tops
 - 5 scrub pants
 - 1 lab coat
 - 1 pair of shoes
 - 1 package of socks or hosiery
 - 1 package of underwear (white t-shirts)

TRANSPORTATION (TOOLBOX CODE 4003)

- Supportive Services Request ETO Touchpoint print-out
- Toolbox Service Notes documenting need
- Toolbox Enrollment Screen and Closure Screen
- Proof of Employment or Program Participation (i.e. timesheet, job search log, verification of employment or pay stub)
- Toolbox printout of Financial Needs Assessment