Basic Procedural Expectations

Key Requirements:

- Participants may be co-enrolled into WIOA formula grants if they are eligible, but it is not required
- Participant must be a dislocated worker, incumbent worker, or new entrant to the workforce
  - Please refer to the guidance definitions provided for **New Entrant to the Workforce**
  - Please refer to WIOA guidance for definitions of **Dislocated Worker** and **Incumbent Worker**

Procedures

Eligibility information:

There are two different option by which a participant can be eligible for this grant:

**Option A: Workers Directly or Indirectly Affected by the Opioid Crisis**

Dislocated workers, new entrants in the workforce, or incumbent workers (currently employed or underemployed) with one of the following characteristics:

- The individual voluntarily answers “Yes” to the following question:
  - *Do you, a friend, or any member of your family have a history of opioid use? Your answer to this question is voluntary.*
  - See Section 13 of **TEGL 12-17** for more information on grant recipients’ legal obligations pertaining to the recipients’ nondiscrimination and medical information responsibilities under Federal law.
- The individual works or resides in a community hard-hit by the opioid crisis or can otherwise demonstrate job loss as a result of the opioid crisis, regardless of any personal impact of the crisis on the individual.

Note: This information should be captured in the eligibility case note. Please note that any specific information regarding a participants, friend, or family members experience with opioids may be subject to HIPAA protections and should be placed in a confidential case note.

**Option B: Workers Seeking to Enter Professions that Could Help in Addressing the Opioid Crisis and Its Causes**
Dislocated workers, new entrants in the workforce, or incumbent workers (currently employed or underemployed) who seek to transition to professions that support individuals struggling with opioid addiction and/or could impact its underlying causes, and who need new or upgraded skills to better serve this population. These individuals are eligible for reskilling or upskilling training activities only in the following professional areas:

• Addiction and substance-abuse treatment and related services;
• Pain therapy and pain management services that could reduce or prevent dependence on prescription painkillers; and,
• Mental health care treatment services for disorders and issues that could lead to or exacerbate opioid abuse and addiction.

Record Eligibility – WAWIN/Participant File:
Both options:
Determine and record eligibility as a dislocated worker, new entrant to the workforce, or incumbent worker.

• If participant is a Dislocated Worker, perform eligibility screening and record/collect required documentation per PacMtn’s local policy. Co-enrollment into WIOA formula is optional but not required.

• If a participant is a new entrant to the workforce, record a case note indicating the participant is a new entrant to the workforce and how they meet the criteria.

• If a participant is an Incumbent Worker, perform eligibility screening and record/collect required documentation per PacMtn’s local policy. Co-enrollment into WIOA formula is optional but not required.

Option A:
Record if either the participant is a worker directly or indirectly affected by the opioid crisis, or if a participant is a worker seeking to enter a profession that could help in addressing the opioid crisis and its causes, and record the corresponding documentation:

• If the participant is a worker directly or indirectly affected by the opioid crisis, record one of the following in the case notes:
  o Document via case note if the individual has answered “Yes” to the eligibility question: Do you, a friend, or any member of your family have a history of opioid use? Your answer to this question is voluntary; OR
  o Document via case note the individual works or resides in a community hard-hit by the opioid crisis or can otherwise demonstrate job loss as a result of the opioid crisis, regardless of any personal impact of the crisis on the individual.

Option B:
If the participant is a worker seeking to enter a profession that could help in addressing the opioid crisis and its causes, record the profession they wish to pursue and identify which of the three qualifying professional areas (noted above) it falls under in the case note.
Example eligibility case note:

Please refer to local guidance for specific case note requirements.

Enrollment:
Co-enrollment into other programs is allowed, but not required.

To enroll participants in the Opioid Demonstration DWG PY18-PY19 program:
1. Create new TouchPoint
2. Select WIOA Application (even if you aren’t co-enrolling into WIOA formula grant, selective service information is captured here and required for federal reporting)
3. Select Basic Career Services Only from the drop down menu
4. Record Selective Service Information, all other questions can be left blank:

5. Complete the Complaint, Grievance, and Equal Opportunity and Data Collection Signatures tab.
6. Save TouchPoint
7. Record eligibility case note and follow PacMtn’s local policy for approval to enroll
8. Once approval for enrollment is received, create new program enrollment TouchPoint
9. Select Opioid Demonstration DWG PY18-PY19 in the program of enrollment field
10. Complete all other data elements in program enrollment TouchPoint

Services:

Career, training, and work-based services are allowed. Specific services and strategy guidance determined by PacMtn WDC. Up to 10% of funding can be used for supportive services.

Example of supportive services that may be allowed:

- Health, mental health, addiction, or other forms of outpatient treatment that may impact opioid addiction and related, underlying, or complicating conditions;
- Drug testing for current use of illegal drugs prior to enrollment in career or training services or prior to employment;
- Linkages to community services, including services offered by partner organizations designed to support grant participants;
- Referrals to health care, including referrals to drug treatment and mental health services; and,
- Payments and fees for employment and training-related applications, tests, and certifications.

All of the above support services should be recorded as a Program Support Service (Other).

Please note: NHE grants may not be used to pay the costs of in-patient drug treatment and rehabilitation programs.

Outcomes:

1. Create new Outcome, Program Completion TouchPoint
2. Select Opioid Demonstration DWG PY18-PY19 from active program enrollment drop down menu
3. Complete Outcome, Program Completion TouchPoint data elements as appropriate for the participant

Follow Up Services - If Applicable

Follow-up services provided to WIOA Title I Adult and Dislocated Worker program participants who are placed in unsubsidized employment and have system-exited must be requested by exited individuals and determined by staff to be appropriate for those individuals.

If applicable and qualifying follow up services are provided, they must be provided for a period of up to 12 months (i.e., not more than 12 months).

- Counseling individuals about the workplace
- Contacting individuals or employers to verify employment
- Contacting individuals or employers to help secure better paying jobs, additional career planning, and counseling for the individual
- Assisting individuals and employers in resolving work-related problems
- Connecting individuals to peer support groups
- Providing individuals with information about additional educational or employment opportunities
- Providing individuals with referrals to other community services

Follow-up services do not extend the date of exit in performance reporting. Placement of employment is accounted for in the second and fourth quarters after exit from the applicable program.

WIT System Data Entry Requirements (WorkSource Integrated Technology System)

For all applicable and required WIOA and or Wagner-Peyser applicant or participant Career, Training or Follow-Up Service Data Entries to include but not be limited to the following:

- Applicant or Participant Registrations,
- Program Enrollments,
- Eligibility Determinations
- (Adult, DW, as applicable, Low Income, Military Service, Veteran, Priority of Service, etc.)
- The IEP’s
- ITA’s and Training Program Enrollments/Service Deliver
- Training paid by others
- Training/Program Completions
- Support Services,
- Exits
- Follow-Up Services,
- Case Note Entries;

and all other data requirements as necessary per Policy 1020 - Data Integrity and Performance Reporting Requirements and Handbook, please follow all current and future Workforce Integrated
Technology (WIT), System guidance, training, instructional materials and direct departmental or program supervisor instruction and policies developed.

If the applicant or participant’s information is already entered in the WIT System, staff must verify that the information is current and/or make updates. If required by program, print out the applicable or necessary document, obtain signatures and place in the hard copy file. Please note all system data updates or changes in case note.

To deliver Career and or Training Services, the program staff person is required to enter participant and program specific data that will create an Individual Employment Plan/Service Plan.

Any discrepancies arising between PacMtn policy and or procedures with federal and state provisions due to current or future revisions will default to the current minimum federal and state regulations and guidance available. PacMtn policy and or procedures may set forth stricter requirements than provided by federal and state guidance, but in no case will PacMtn policy and or procedures not meet minimum federal and state policy.

New Entrant to the Workforce Definitions:

- An individual (age 16 and up) just entering the workforce for the first time
  OR
- An individual (age 16 and up) who has been disconnected* from the workforce for long enough that it’s as if they are starting over, including**:
  - Individuals who have experienced unemployment for longer than twenty-seven (27) weeks
    OR
  - Individuals who have been disconnected* from the workforce by incarceration and/or conviction
    OR
  - Individuals who have been disconnected* from the workforce for at least thirty (30) days due to institutionalization into an inpatient treatment facility or outpatient treatment regimen
    OR
  - Individuals who have been disconnected* from the workforce due to new or exacerbated disability or substance use disorder which caused disconnection due to the individuals inability to perform the essential functions of their previous employment and/or has impacted their ability to establish new employment

*Disconnected is defined as any separation that has not allowed or will not allow an individual to return to their previous place of employment or previous line of work.

**Justifications for these definitions include consideration that these individuals are re-entering the workforce with new barriers that may prevent them from returning to existing employment and/or are re-entering after a health related scenario.
References

Workforce Innovation and Opportunity Act of 2014

Training and Employment Guidance Letter (TEGL) 12-17

WorkSource System Policy 1019 R4 & Attachment A - Eligibility Handbook

PacMtn Policy #1111 - OURR Eligibility Policy
PacMtn Policy # 5005 - Career Services
PacMtn Policy #5015 - Training Services
PacMtn Policy #5300 - Incumbent Worker Training
PacMtn Policy #5200 - Support Services

Compliance with the state’s eligibility policy will be based on the version of the handbook in effect at the time of the action or activity that may be at issue.

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