



WORKFORCE INNOVATION AND OPPORTUNITY ACT (WIOA)
YOUTH PROGRAM
POLICY / DIRECTIVES

Policy Number: WIOA Youth 03-2024-13

 X **New Policy**

 Revised

Date: **March 13, 2024**

Subject: **WIOA Youth Supportive Services Policy**

Michele Burns

Michele Burns
Executive Director
CareerSource Okaloosa Walton

Date: 03/18/2024

Scott Seay

Scott Seay
Board Chair
CareerSource Okaloosa Walton

Date: 03/18/2024



Workforce Innovation and Opportunity Act (WIOA)

WIOA Youth Supportive Services

TABLE OF CONTENTS

	<u>Page</u>
I. Purpose	4
II. Background	4
III. Reference	5

PART I – OPERATIONAL REQUIREMENTS

IV. POLICIES AND PROCEDURES

A. Policy Guidance	6
B. What Are Supportive Services For Youth?	6
C. Who May Receive Supportive Services?	7
D. When Can Supportive Services Be Provided to WIOA Title I Youth?	7
E. When Is It Allowable to Use Supportive Services?	8
F. Coordination Of Services	8
G. The Fourteen (14) WIOA Youth Program Elements	8
H. Statement of Need and Value	10
I. Additional Provisions for Case Management	11

J. Policy Clarification on When to Provide Support Services	11
K. How Does Support Services Relate to Follow-Up Services?	16

PART II – ADMINISTRATIVE REQUIREMENT

V. BUDGET

A. Limits On the Amount and Duration of Supportive Services	17
B. Oversight, Accountability, And Internal Controls	18
C. How to Process Payments for Supportive Services	19
D. Documentation	19
E. Confidentiality	20
F. Suggestions For Changes or Waivers	20
G. Action Required	20
H. Training Hours	20

Appendix

A. How to Process Payments for Supportive Services	
--	--



Workforce Innovation and Opportunity Act (WIOA) Youth Program

WIOA Youth Supportive Services

OF INTEREST TO

CareerSource Okaloosa Walton staff engaged in implementing the Workforce Innovation and Opportunity Act (WIOA) Youth Program.

SUBJECT

WIOA Youth Supportive Services Policy

I. PURPOSE

The purpose of this policy is to provide staff with the requirements to ensure the appropriate supportive services are provided to eligible WIOA participants.

II. BACKGROUND

WIOA requires Local Workforce Development Boards (LWDBs), in consultation with the one-stop partners and other community service providers, to develop a supportive services policy that ensures resource and service coordination in the local area. The policy should address procedures for referrals to such services, including how the services will be funded when they are not otherwise available from partners or other sources.

Supportive Services provide participants of WIOA activities with key assistance beyond career and training services necessary to achieve success. Supportive services, like assistance with transportation or childcare, allow participants to successfully engage with WIOA career and training activities such as Registered Apprenticeships or classroom training that are vital to entering or re-entering the workforce.

A key principle in WIOA is to provide local areas with the authority to make policy and administrative decisions and the flexibility to tailor the public workforce system to the needs of

the local community. To ensure maximum flexibility, WIOA regulations provide local areas the discretion to provide the supportive services they deem appropriate, subject to the conditions prescribed by WIOA. LWDBs must have policies and procedures in place:

- To ensure coordination with other entities to ensure non-duplication of resources and services.
- To establish limits on the amount and duration of such services.
- For purchasing and distributing food to ensure consistent treatment of these types of expenses; and
- To ensure compliance with Uniform Guidance at 2 CFR 200.403.

Supersedes/Revision: WIOA Youth Supportive Services, WIOA Youth 09-2015-01, September 8, 2015

III. REFERENCES

- Workforce Innovation and Opportunity Act' of 2014; Section 129.
- Workforce Innovation and Opportunity Act; Final Rule; 20 CFR Part, 681.
- Training and Employment Guidance Letter 23-14, Operating Guidance for the Workforce Innovation and Opportunity Act).
- Uniform Guidance for Federal Awards - 2 CFR Part 200; CFR 200.403, Factors affecting allowability of costs.
- Training and Employment Guidance Letter (TEGL) 09-22, Workforce Innovation and Opportunity Act Title I Youth Formula Program Guidance.
- Florida Statutes 112.061(6)(b), Per diem and travel expenses of public officers, employees, and authorized persons; statewide travel management system.
- Department of Florida Commerce (FloridaCommerce), Final Guidance (FG) 071.

PART I – OPERATIONAL REQUIREMENTS

IV. POLICIES AND PROCEDURES

A. POLICY GUIDANCE

1. WIOA provides local areas with the authority to make policy and administrative decisions that tailor their services to the needs of the local community. To ensure maximum flexibility with the execution of this policy and ensure equal access to program services, the WIOA Career Advisors must:
 - a. Provide the appropriate supportive services that meet the needs of the participants.
 - b. Initiate coordination with other community agencies to ensure the highest quality and most comprehensive service provisions possible.
 - c. Avoid duplication of resources and services.
 - d. Develop and maintain a **Supportive Services Resource Guide** listing agencies in the local community and the type of supportive services they provide. This includes agencies that provide food for low-income individuals.
 - e. Ensure that supportive services are funded by WIOA only when these services are not available through other means; and
 - f. Ensure that supportive services are necessary to enable youth to successfully participate in activities authorized under WIOA sec. 129(c)(2) and defined in WIOA sec. 3(59) and 20 CFR 681.570.

B. WHAT ARE SUPPORTIVE SERVICES FOR YOUTH?

1. Supportive services for youth are defined in WIOA sec. 3(59). They are services that enable an individual to participate in WIOA activities. These services include, but are not limited to, the following:
 - a. Linkages to community services.
 - b. Assistance with transportation.
 - c. Assistance with childcare and dependent care.
 - d. Assistance with housing.

- e. Needs-related payments.
- f. Assistance with educational testing.
- g. Reasonable accommodations for youth with disabilities.
- h. Legal aid services.
- i. Referrals to health care.
- j. Assistance with uniforms or other appropriate work attire and work-related tools, including such items as eyeglasses and protective eye gear.
- k. Assistance with books, fees, school supplies, and other necessary items for students enrolled in postsecondary education classes.
- l. Payments and fees for employment and training-related applications, tests, and certifications.
- m. **Food purchases (Added);** and
- n. For other reasonable and necessary services that may be acceptable. A prior written request must be approved in advance by the Executive Director or designee.

C. WHO MAY RECEIVE SUPPORTIVE SERVICES?

1. Supportive services are authorized for individuals enrolled in WIOA Youth programs; and may only be provided to participants who are unable to obtain supportive services through other programs providing such services.
2. Supportive services are not a standalone WIOA activity. They are intended to provide participants with financial assistance or other support needed to allow participation in and successful completion of a WIOA program. Supportive services give participants the opportunity to reach their goal of obtaining unsubsidized employment.

D. WHEN CAN SUPPORTIVE SERVICES BE PROVIDED TO YOUTH?

Supportive services can be provided to WIOA Title I Youth during **program participation** and during **follow-up services**. There are no specific requirements for when to provide supportive services other than they may be provided based on an initial

assessment or objective assessment and the needs of the participant as identified in the **Individual Service Strategy (ISS)**.

E. WHEN IS IT ALLOWABLE TO USE SUPPORTIVE SERVICES?

1. WIOA section 129(c) (2) requires local youth programs to include the **fourteen program elements** as options available to youth participants. Reasonable and necessary costs associated with assisting a youth to participate in activities derived from the fourteen elements are allowable.
2. Before authorizing supportive services, every effort must be made by the Career Advisor to obtain these services through partner agencies or other community resources.
3. *Moreover, the WIOA Career Advisor must make a determination or need and document in a case note that the participant is in need of, and unable to receive supportive services from other sources that will allow participation in one of the WIOA program activities.*

F. COORDINATION OF SERVICES

1. USDOL/ETA encourages agencies to work closely together to align programs better and to leverage resources. Therefore, it is vital that Career Advisors work closely with partner and community programs to ensure participants receive all the benefits they are entitled to under all aspects of the law. For example, coordinating services with Vocational Rehabilitation will ensure individuals with disabilities receive the supportive services they need and will prevent duplication of services.
2. The Career Advisors should coordinate services across WIOA core programs, as well as non-core programs, including required one-stop partners, to help individuals with barriers to employment, including individuals with disabilities, obtain the support they need to successfully participate in and complete career and training services; and ultimately, obtain unsubsidized employment.

G. THE FOURTEEN (14) WIOA YOUTH PROGRAM ELEMENTS

1. The WIOA regulations at 20 CFR 681.460 require that local WIOA youth programs make each of the 14 program elements available to youth participants. CSOW will make all 14 program elements available either directly or through referral for youth participants:

- a. **Program Element 1:** Tutoring, study skills training, and 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 post-secondary credential.
- b. **Program Element 2:** Alternative secondary school services, or dropout recovery services as appropriate.
- c. **Program Element 3:** Paid and unpaid work experiences that have academic and occupational education as a component of the work experience, which may include the following types of work experiences:
 - (1) Summer employment opportunities and other employment opportunities available throughout the school year.
 - (2) Pre-apprenticeship programs.
 - (3) Internships and job shadowing; and
 - (4) On-the-job training opportunities.
- d. **Program Element 4:** Occupational skill training, which includes priority considerations for training programs that lead to recognized post-secondary credentials that align with in-demand industry sectors or occupations in the local area, if the Local Board determines that the program meet the quality criteria described in WIOA sec. 123.
- e. **Program Element 5:** Education offered concurrently with and in the same context as workforce preparation activities and training for a specific occupation or occupational cluster.
- f. **Program Element 6:** Leadership development opportunities, including community service and peer centered activities encouraging responsibility and other positive social and civic behaviors.
- g. **Program Element 7:** Supportive services.
- h. **Program Element 8:** Adult mentoring for a duration of at least twelve (12) months, that may occur both during and after program participation. Adult mentoring is a formal relationship between a youth participant and an adult mentor that includes structured activities where the mentor offers guidance, support, and encouragement to develop the competence and character of the mentee.

- i. **Program Element 9:** Follow-up services for not less than 12 months after the completion of participation.
- j. **Program Element 10:** Comprehensive guidance and counseling, which may include drug and alcohol abuse counseling, as well as referrals to counseling, as appropriate to the needs of the individual youth.
- k. **Program Element 11:** Financial literacy education.
- l. **Program Element 12:** Entrepreneurial skills training.
- m. **Program Element 13:** Services that provide labor market and employment information about in-demand industry sectors or occupations available in the local area, such as career awareness, career counseling, and career exploration services; and
- n. **Program Element 14:** Activities that help youth prepare for and transition to post-secondary education and training.

H. STATEMENT OF NEED AND VALUE

1. Staff must first determine that the participant is in financial need of supportive services before they can be provided. Supportive services should be used to address the participant's barriers identified during the **initial assessment** or **objective assessment** process.
2. The plan for the provision of supportive services must be documented in the participant's Individual Employment Plan (IEP) or Individual Service Strategy (ISS) as appropriate, and case notes. The **Statement of Need and Value** signed by the participant will be the final step to determine the participant's need for supportive services. The Career Advisor may use additional supporting documentation that demonstrates the participant's financial need, such as a budget or some other form of financial analysis.
3. The Career Advisor will use a self-attestation signed by the participant to document that the supportive service was used for its intended purpose. The self-attestation should be signed within 30 days of the issue date. The self-attestation should be documented in the case notes and filed in ATLAS.

I. ADDITIONAL PROVISIONS FOR CASE MANAGEMENT

1. As discussed in TEGL 21-16, case management is the act of connecting youth to appropriate services. It is not a program element, a program activity, or a program service. The CSOW case managers also known as Career Advisors have the discretion to determine the specific program activities and services to be provided to a youth participant, based on each participant's **objective assessment** and **individual service strategy**.
 - a. CareerSource Okaloosa Walton intends that supportive services are provided for youth from the point of participation through the 12-month follow-up period to assist in the removal of any barriers to program participation or post-program activities.
 - b. Supportive services must be necessary for each participant consistent with their needs. Supportive services are not entitlements and should be administered consistent with this policy. Supportive services should be based on a documented need, considering individual circumstances, the absence of other resources, and funding limits.
 - c. For supportive services to be meaningful, staff should design activities to result in the attainment of recognized skills and other measurable objectives leading to successful outcomes.
 - d. Supportive services may be a one-time service or time-limited services, depending on funding availability.
 - e. Supportive services may be provided to youth during program participation and during the 12-month follow-up period after exit.
 - f. The need for any supportive service must be documented in the participant's Individual Service Strategy and in a case note, including all efforts to obtain the needed services from a non-WIOA source.

J. POLICY CLARIFICATION ON WHEN TO PROVIDE SUPPORT SERVICES

1. Clarity and consistency in providing the program elements are imperative. The guidance that follows will facilitate the consistent assignment of services across the region and prevent duplicated reporting of the same service in multiple reporting categories.
2. For additional clarity refer to Section F. of this policy: **The Fourteen (14) WIOA Youth Program Elements**. These clarifications are intended to help ensure equity in program administration and to clarify some of elements in this supportive services policy for youth:

a. **Linkages to Community Services**

- (1) Here are some examples of supportive services referrals that may be made under **Linkages to Community Services**:

- (a) Drug and alcohol abuse counseling.
- (b) Temporary shelter.
- (c) Financial counseling; and
- (d) Other reasonable and necessary services that may be acceptable with a prior written request approved in advance by the Executive Director or designee.

b. **Child/Dependent Care**

- (1) **Since funding for child/dependent care is considered limited**, requests will be considered on a case-by-case basis. A written request must be made in advance and approved by the Executive Director or designee.
- (2) Child/dependent care may be provided for participants while they are engaged in training or employment activities consistent with their Individual Service Strategy (ISS). If approved, the service will be **limited to no more than 3 months per participant each program year depending on the availability of funds**.
- (3) Priority for this service will be given to single heads of household and will not be made for such care if the participant has an unemployed spouse in the home. The participant must be the custodial parent or guardian of the child/dependent for whom the services are required.
- (4) Before requesting supportive services funds for child/dependent care, the Career Advisor must explore alternative dependent care programs that may be available in the local area, such as the Okaloosa Childcare Services. If other programs are not available or appropriate, and supportive service funds are authorized for dependent care services, participants should use only licensed daycare centers or licensed babysitters.
- (5) Payment requests must be for services provided. Advanced payment will not be authorized.

c. **Transportation**

Transportation support services must be reasonable and necessary for an eligible youth to participate in one of the WIOA 14 Youth Program Elements. Assistance may include bus passes. Duplication of a bus pass and other forms of incentives for the same activity should be avoided.

d. **Food Purchases**

- (1) Reasonable and necessary food purchases may be made under CSOW local policy: **WIOA Youth 3-2024-13, Food and Beverage Purchases for Youth.**
- (2) On a limited basis and in certain situations, food at a reasonable cost may be provided to youth-serving program participants as a supportive service.
- (3) Food may be provided to eligible youth when it will assist or enable the participant to participate in allowable youth program activities and reach his/her employment and training goals consistent with the Individual Service Strategy.

e. **Medical, Dental, and Counseling Expenses**

- (1) Since **funding for this service is considered limited**, it will be handled on a case-by-case basis. A written request must be made in advance and approved by the Executive Director or designee.
- (2) If other resources are not available, reasonable and necessary medical services such as eyeglasses or other minor services that are necessary to enable an individual to participate in WIOA activities are allowable expenses.
- (3) Medical and counseling expenses improve participant outcomes. Assistance with medical and dental services not covered by other insurance policies, programs, or Medicaid is allowable providing they are necessary for participation.
- (4) Professional counseling may also be provided to a participant under comprehensive guidance and counseling services provided for under **Program Element #10**. This Program Element addresses legal, financial, mental health, and other personal needs as well as outpatient treatment for substance abuse if not covered by other insurance policies, programs, or Medicaid. Standard fees charged for medical records and reports are also allowable.

f. Tools, Books, Supplies and Equipment

- (1) Items included as part of an Individual Training Account (ITA), and are necessary for participation in training, may be purchased with WIOA funds. Such purchases must be a requirement for training.
- (2) Items that are recommended by an instructor but not required for every student are not normally supported with WIOA funds.
- (3) If the **training site requires** that a trainee have uniforms, tools, etc., and does not provide such items for regular employees or trainees, WIOA funds may be utilized.

g. Safety Gear, Tools, and Equipment for Employment

- (1) Boots, helmets, gloves, safety vests, eye protection, other safety gear required by OSHA standards and tools required for participation in training or to succeed in employment are allowed.
- (2) Participants may receive assistance for the purchase of tools and equipment related to training or necessary for accepting an employment offer. A given tool or piece of equipment may only be purchased once **unless** a written request is made in advance and approved by the Executive Director or designee.

h. Work Clothing and Uniforms

Work clothing including uniforms required by employers may be purchased if necessary for a participant to obtain or retain employment.

i. Legal Aid Services

USDOL/ETA recognized that legal aid can uniquely address certain barriers to employment for youth and therefore, included **legal aid services** as a supportive service if not covered by other insurance policies, or programs. This change is authorized under 20 CFR 681.570.

j. Emergency Services

Since **funding for this service is considered limited**, it will be handled on a case-by-case basis, considering funding availability. The written request must be approved

in advance by the Executive Director or designee. The **Statement of Need and Value** signed by the participant must accompany the request for emergency support services.

- (1) For emergency services, there must be a reasonable expectation that the assistance will resolve the situation; for example, if rent is paid for one month, there must be a reasonable expectation that the participant will obtain the resources to pay rent for the following months.
- (2) Emergency services include housing assistance, payments for overdue electricity, home heating fuel, and water bills; telecommunication costs; food; and/or payment for temporary shelter.
- (3) In instances where an overdue electric, home heating fuel, and/or water bill is being paid, it must be documented that the participant has contacted the local **Low-Income Home Energy Assistance Program (LIHEAP)** energy assistance provider and found eligible for services but unable to receive services due to a lack of program funds.
- (4) Each emergency situation must be evaluated on an individual basis and should include an evaluation of alternative resources in the community. In instances when emergency services are provided, **such assistance must be to address a non-reoccurring emergency** or there must be a reasonable expectation that the assistance will resolve the situation for the foreseeable future.

k. **Out-of-Region Supportive Services**

This support service will be authorized on a case-by-case basis depending on the circumstances, length of training, and funding availability. In addition to the support services already mentioned in this local policy, consideration may also be given to lodging costs and additional transportation costs, if appropriate, depending on funding availability.

l. **Disaster Recovery Dislocated Worker Grants**

To be ready to respond to natural disasters or major emergencies, CSOW will include consideration for supportive services that may be unique to potential disasters/emergencies. For example, there may be a need for insect repellent for individuals conducting cleanup of damaged public property, which CSOW might not otherwise consider allowable under normal circumstances. In the case of a disaster, staff should coordinate the need for supportive services not included in this local policy with the Executive Director or designee.

m. **Other Support Services**

- (1) Other support services that are necessary for a participant's participation in WIOA may be allowed. Since **funding for this service is considered limited**, it will be handled on a case-by-case basis. A written request must be made in advance and approved by the Executive Director or designee.
- (2) Examples of general support services include job coaches, clothing, temporary shelter, financial counseling and other reasonable and necessary expenses **required** for participation and not covered elsewhere in this policy.

n. **Supportive Services Restrictions**

Supportive services **may not** be used to pay for the purchase of items such as improvement, or maintenance of any asset (e.g. car payments or mortgage payments); to pay taxes; to pay past due fees, penalties, interest, or other such expenses; to pay child support payments in arrears or otherwise; to pay for parking or moving violation tickets; to pay for bail or restitution; to settle an insurance claim; or to pay for a consumer debt. Computer hardware and software are considered assets.

K. HOW DOES SUPPORT SERVICES RELATE TO FOLLOW-UP SERVICES?

1. Supportive services come under **Program Element 7**. It is one of the five types of Youth Program Elements that may be provided after exit from the WIOA program as discussed in 20 CFR 681.580. If supportive services are provided as a follow-up service, they do not extend the date of exit.
2. A follow-up service is a type of career service but is not a qualifying service for the receipt of supportive services. Therefore, **an individual who is only receiving "follow-up" services should not receive support services**. To receive support services, the individual must be participating in career services (other than follow-up services), and/or training services.
3. **Follow-up services** which support services may be provided for youth may include the following program elements:
 - a. **Supportive services.**

Note: Program Element 7.

- b. **Adult mentoring.**

Note: Program Element 8.

- c. **Financial literacy** education.

Note: Program Element 11.

- d. **Services that provide labor market and employment information** about in-demand industry sectors or occupations available in the local area, such as career awareness, career counseling, and career exploration services; and

Note: Program Element 13.

- e. **Activities** that help youth **prepare for** and transition to **postsecondary education and training.**

Note: Program Element 14.

PART II – ADMINISTRATIVE REQUIREMENTS

V. BUDGET

A. LIMITS ON THE AMOUNT AND DURATION OF SUPPORTIVE SERVICES

1. CareerSource Florida (CSF) Administrative Policy and 20 CFR 680.920 allows local Boards to establish limits on the provision of supportive services or provide the One-Stop center with the authority to establish limits, including a maximum amount of funding and maximum length of time for supportive services to be available to participants. CSOW will use the flexibility in guidance to establish supportive services limits, including a maximum amount of funding and length of time a participant may receive supportive services:

- a. **Participant's Supportive Services Budget**

- (1) The amount of the participant's supportive services budget is dependent on the WIOA allocations received from the Florida Department of Commerce. Each participant's budget should be set at a maximum amount of \$1000.00 per Program Year (PY), not to exceed \$2000.00 over two years.

- (2) A review of the participants' supportive services budget should be conducted periodically to ensure funding is available to cover any projected needs. Under some circumstances an increase in the individual's budget may be authorized if requested in writing and approved by the Executive Director or designee. All requests for an increase in the supportive services budget must be accompanied by a **Statement of Need and Value**.

b. Participant's Supportive Services Budget Year

- (1) The supportive services budget year should align with the Program Year and run from July 1 through June 30. The participant's supportive services budget in Gazelle will start on the date the Career Advisor signs the initial **Statement of Need and Value** and end on the last day of the Program Year; or when no longer needed, whichever comes first.
- (2) A participant should not receive more than the allowable \$1000.00 per budget year and \$2000.00 over two budget years unless a written request is approved in advance by the Executive Director or designee.
- (3) The Career Advisor must review the customer's open and closed supportive accounts in Gazelle before requesting a supportive service.
- (4) If a participant does not exhaust the supportive services budget during the budget year, any remaining funds in the account will be zeroed out and a new budget, not to exceed \$1000.00, will be established for the new Program Year.
- (5) For the second and subsequent budget years, the participant's supportive services budget will start on the first day of the PY and end on the last day of the PY or the last date of the participant's services, whichever comes first.

B. OVERSIGHT, ACCOUNTABILITY, AND INTERNAL CONTROLS

1. CareerSource Okaloosa Walton will use the highest level of oversight, accountability, and internal controls to ensure supportive services provided to participants are used for their intended purpose. The participants will be required to sign a **Statement of Need and Value** to document the need for supportive services. And will be required to sign a self-attestation to document that the supportive services were used for their intended purpose. To enhance internal controls, the following guidelines will be used to ensure accountability within the supportive services program:

- a. **Assistance with Transportation:** CSOW will use re-loadable debit cards to assist participants with gas expenditure. Instructions for using the reloadable debit cards are in **Appendix A**.

b. CSOW will use a **voucher/direct payment to the selected vendor** for the following services and activities:

- (1) Assistance with childcare and dependent care.
- (2) Assistance with housing.
- (3) Assistance with educational testing.
- (4) Reasonable accommodation for individuals with disabilities.
- (5) Legal aid services.
- (6) Assistance with uniforms or other appropriate work attire and work-related tools, including such items as eyeglasses and protective eye gear.
- (7) Assistance with books, fees, school supplies, and other necessary items for students enrolled in postsecondary/education classes.
- (8) Payments and fees for employment and training-related applications, tests, and certifications.

c. **Reimbursements to participants** are allowable only in situations that do not allow for normal processing. The request must be in writing and approved in advance by the Executive Director or designee. The request must include a **Statement of Need and Value** and be documented in a case note. Documentation in the file should show:

- (1) The payment was made.
- (2) The purpose of the payment.
- (3) Proof of follow-up verification by the Career Advisor; And
- (4) Other documentation required by this local operating procedure.
- (5) **The self-attestation showing the funds were used for its intended purpose.**

C. HOW TO PROCESS PAYMENTS FOR SUPPORTIVE SERVICES

See Appendix A.

D. DOCUMENTATION

1. The Career Advisor **must** document in the case notes in Employ Florida (EF) that supportive services were addressed and if appropriate, provided to the participant. In addition, the Career Advisor **must** document whether supportive services were available through other One-Stop partners or community agencies. The appropriate Supportive Services Activity Code must be entered in EF.
2. The Career Advisor should have available the Supportive Services Resource Guide to locate a One-Stop partner or community agency that may be able to assist with supportive services.
3. All incentives earned by participating youth will be funded to a debit card in the name of the youth. Since the youth become eligible for supportive services at initial participation, debit cards should be requested at that time to ensure cards are on hand when needed. Upon receipt of the debit card, youth must sign the acknowledgment form regarding any fees associated with their card.
4. Incentives will be requested through the Gazelle system in accordance with instructions provided by the Finance Department and **Appendix A. Remember: The Support Account in Gazelle should be opened on or after the date of the support activity in EF.** Applicable supporting documentation must be scanned into each participant's ATLAS case file.

E. CONFIDENTIALITY

All data collected as a result of this policy is for official use only and should only be used in conducting official business. Refer to the Workforce Boards Policy on confidentiality for additional information.

F. SUGGESTIONS FOR CHANGES OR WAIVERS

Submit a request for changes or waivers to this policy to CareerSource Okaloosa Walton, 109 8th Avenue, Shalimar, Florida 32579, ATTN: Executive Director or Chief Operating Officer. Request may also be e-mailed to: policy@careersourceow.com.

- a. Request for changes must include the suggested change and an explanation of how the change will improve the process.
- b. Request for **waivers** must include names, effective dates, case notes relating to the waiver, dollar amounts, etc.; and any other documentation to support the request.

G. ACTION REQUIRED

CSOW staff in Okaloosa and Walton Counties are required to implement this supportive services policy upon receipt.

H. TRAINING HOURS: 2.0 hours.



PAYMENT METHODS FOR SUPPORT SERVICES

A. RESPONSIBILITIES

1. To ensure an efficient system for managing and distributing reloadable debit cards the following responsibilities are delineated:

a. Finance Department:

- (1) Is responsible for ensuring payments are made to the vendor for the debit cards.
- (2) Will order the debit cards requested via the Gazelle System by the Career Advisor and process the downloading of dollars to each card as requested through Gazelle as per a predetermined schedule provided to the Career Advisors.
- (3) Will provide reports as requested to the Management Team for review of participant expenses.
- (4) Coordinate any corrections to a card as deemed necessary. EFT transfers to the outside vendor conducted by the Finance Department are approved per the EFT policy by the Executive Director to ensure that the dollar amounts transferred reconcile with the requests made by the Career Advisors for the participants.

b. Career Advisors:

- (1) Will determine who in their caseload will receive a debit card. The check request form in Gazelle will be used to request the debit card and download dollars.
- (2) Will ensure the participants receive the debit card; and sign an agreement indicating the fee structure before any dollars are downloaded onto the card.
- (3) Will ensure the participants understand the debit card system process and their individual responsibilities.

c. Participant:

- (1) Is responsible for any fees as indicated on the agreement signed by the participant.

B. RELOADABLE DEBIT CARD MANAGEMENT

1. The CSOW Debit Card system is an electronic system using debit cards which are reloadable in amounts determined by the Career Advisor, based on documented evidence, for participation in the WIOA program and any other WIOA special projects ***where transportation may be provided to participants***. The CSOW debit card **system eliminates the need:**
 - a. To have prepaid cards on hand.
 - b. For inventories of physical cards. And
 - c. Repetitive reordering of cards.
2. The debit card system also provides a means to track total expenditures for individual participants through Gazelle which interfaces with the MIP Accounting System.
3. The Debit Card system works through the Gazelle and MIP systems using an outside vendor as the portal for cards and for downloading dollars to the cards for participants.
4. ***Reloadable debit cards will not be used for other Support services such as childcare, uniforms, books, licensing fees, etc. See Paragraph L above.***

C. OTHER PAYMENT METHODS FOR SUPPORT SERVICES

1. Support Services are unique goods or services provided to eligible WIOA participants. These types of services can include assistance with childcare and dependent care; assistance with housing; reasonable accommodations for individuals with disabilities; uniforms or other appropriate work attire; and assistance with books, fees, school, and supplies. Career Advisors will utilize the Gazelle Client Services System to generate either Purchase Orders or Check Requests as a means of providing these support services to eligible participants.
 - a. **Purchase Orders**
 - (1) Purchase Orders will be generated from the Gazelle Client Services System when goods or services can be invoiced to CareerSource after the participant has received the goods or services.
 - (2) Purchase Orders must be approved by the Program Manager/Coordinator.
 - (3) It is the responsibility of the Program Manager/Coordinator to ensure the transmission of the approved Purchase Order to the Vendor.

- (4) It is the responsibility of the Program Manager/Coordinator to ensure transmission of the approved Purchase Order to the Finance Department for processing, and should include the following in the file:
 - (a) Original Gazelle printout.
 - (b) Copy of the case note.
 - (c) Proof of enrollment in program.
 - (d) Proof that the purchase is recommended or required.
(Examples include a letter from the employer, an itemized list from school, and/or a case note).
 - (e) Verification of cost from the vendor
- (5) The Finance Department will be responsible for the reconciliation of the Purchase Order package with the invoice from the vendor and payment processing per all other payment processing described in the General Policies Manual.

b. Check Requests

- (1) Check Requests will be generated from the Gazelle Client Services System when goods or services must be paid for before the participant receives the goods or services. Check Requests must be approved by the Program Manager/Coordinator.
- (2) It is the responsibility of the Program Manager/Coordinator to ensure transmission of the approved Check Request to the Finance Department for processing, and should include the following:
 - (a) Original Gazelle printout.
 - (b) Copy of the case note.
 - (c) Proof of enrollment in an identified program.
 - (d) Proof that the purchase is recommended or required.
(Examples include letter from employer, itemized list from school, and/or a case note).
 - (e) Verification of cost from the vendor.
- (3) The Finance Department will be responsible for processing the check following all payment processing described in the General Policies Manual.
- (4) For emergency requests all efforts for expediting will be accommodated.