



POLICY/PROCEDURES

Policy Number: WTP 11-2020-30

Title: Welfare Transition (WT) Supportive Services

Program: Welfare Transition Program (WTP)

Adopted Date: WTP 09-2017-10, September 29, 2017

Revision Date: November 30, 2020

A handwritten signature in blue ink that reads "Michele Burns".

Michele Burns
Executive Director
CareerSource Okaloosa Walton

1 Attachment

Support Services Statement of Need and Value

Appendix A

Welfare Transition Supportive Services/Incentive Plan

Temporary Assistance for Needy Families (TANF)

Welfare Transition Program (WTP)



TABLE OF CONTENTS

	<u>Page</u>
Purpose	4
Background	4
Reference	4

POLICY GUIDANCE

A. AVAILABILITY OF FUNDS	5
B. WHAT ARE SUPPORT SERVICES?	5

WHO MAY RECEIVE SUPPORT SERVICES?

A. APPLICANTS	6
B. DIVERSION SERVICES	7
C. MANDATORY PARTICIPANTS	8
D. DEFERRED PARTICIPANTS	8
E. TRANSITIONAL SERVICES – GENERAL GUIDANCE	8
F. TRANSITIONAL SUPPORT SERVICES	9
1.a. Transitional Transportation.....	9
1.b. Transitional Child Care.....	10
1.c. Transitional Education and Training.....	12
G. UPFRONT DIVERSION PARTICIPANTS	12

H. PARTICIPANT'S SUPPORT SERVICES BUDGET	13
I. PARTICIPANT'S SUPPORT SERVICES BUDGET YEAR	13
J. TRANSPORTATION ASSISTANCE	14
K. BACKGROUND CHECKS	14
L. STANDARDS RELATED TO TRANSPORTATION ASSISTANCE	15
M. CLOTHING	15
N. UTILITIES	16
O. EMERGENCY HOUSING ASSISTANCE	16
P. INCENTIVE AWARDS	17
Q. TRACKING SUPPORTIVE SERVICES AND EXPENDITURES	17
R. CLIENT SERVICES DOCUMENTATION	19
S. CONFIDENTIALITY	20
T. SUGGESTIONS FOR CHANGES OR WAIVERS	20
U. ACTION REQUIRED	20
V. Training Hours	20



Welfare Transition Program (WTP)

Supportive Services

OF INTEREST TO

CSOW staff in Okaloosa and Walton Counties responsible for implementing the Welfare Transition Program (WTP).

SUBJECT

CSOW Welfare Transition (WT) Supportive Services

PURPOSE

To provide guidance to assist CSOW staff with administering the Welfare Transition Supportive Services policy.

BACKGROUND

With the passage of the 1996 legislation, Personal Responsibility Work Opportunity and Reconciliation Act (PRWORA), states were provided with increased flexibility to spend TANF dollars. Statewide, Mandatory caseloads were reduced dramatically allowing more funds to be spent on **support services**, demonstration programs, special projects and **diversions from ongoing cash assistance**. The Federal Regulations issued in April 1999 not only outline the flexibility of TANF funds to develop new and innovative ways to serve families and communities, the Federal Regulations include the boundaries in which the TANF funds must be used. Florida Statutes Chapter 445 also addresses the use of TANF funds for innovative programs, diversions from public assistance and supportive services.

REFERENCES

- Department of Economic Opportunity Grantee Sub-Grantee Agreement, July 2020.
- AWI FG 05-047, Temporary Assistance for Needy Families (TANF), Use of TANF Funds, March 14, 2005.
- The 1996 legislation, Personal Responsibility Work Opportunity and Reconciliation Act (PRWORA).

- Florida Statutes 445.032.
- FG 04-020, Welfare Transitional Childcare, June 21, 2004.
- AWI FG 04-013, Welfare Transition Up-Front Diversion Program, June 21, 2004.

POLICY GUIDANCE

A. AVAILABILITY OF FUNDS

Subject to the availability of funding, support services will be provided as needed to ensure participation in allowable work activities. The provision of support services for any period of time does not constitute an entitlement to continuation of support services. Efforts should be made to obtain support services through One-Stop partner agencies or other community resources. **The participants should be briefed that support services are not an entitlement and may be provided only as funding permits.** All support services provided to participants will be documented in the One-Stop Service Tracking (OSST) and other data management systems as directed by CareerSource Okaloosa Walton.

B. WHAT ARE SUPPORT SERVICES?

1. Support services are intended to assist the welfare transition participant in participating in required activities that are designed to lead to employment and self-sufficiency. Support services may only be offered to eligible individuals/families who are:
 - a. TANF eligible; and
 - b. Must have a documented need for the support service.
2. Supportive services may include, but are not limited to such items as:
 - a. **Transportation assistance.**
 - b. **Automotive repairs** in limited instances.
 - c. **Driver's license fees.**
 - d. **Work-related clothing; or**
 - e. **Tools.**
 - f. **Books.**
 - g. **Emergency housing assistance.**
 - h. **Emergency childcare.**

- i. **Short-term individual or family counseling** *necessary for successful participation in assigned activities, and not covered by Medicaid or other funding sources.*
 - j. **Medical second-opinions** for deferred customers (If not paid for by Medicaid).
 - k. To complete medical documents for mandatory participants.
 - l. Other allowable costs that are necessary for participation in allowable and countable activities.
3. Support services expenditures include any monies spent on support services in the form of a check request, credit card purchase, purchase order, or money loaded onto a debit card.
4. **Support service funds may not be used to pay for fines, late fees, or past due obligations except in the case of providing assistance with paying rent in order to avoid eviction from a current housing situation (Paragraph O. below); and to avoid power and water stoppage, (Paragraph N.4. below).**
5. **Ancillary Expenses:** These may include books, tools, clothing, education or training fees, background checks, drug screening, or other costs to comply with employers' hiring conditions, or other expenses necessary to complete work or alternative requirement plan activities, such as paying the fee for a medical form certifying disability or other medical condition to be completed by a physician licensed under Florida Statute Chapter 458 or 459. The completion of a medical form or statement is not a service Medicaid covers.

WHO MAY RECEIVE SUPPORT SERVICES?

A. APPLICANTS

1. Individuals must first apply for cash assistance through the Department of Children and Families (DCF) and complete required paperwork. If DCF determines the applicant to be "work eligible," they will refer him or her to a CareerSource center to work register.
- a. Work registration includes the following at a minimum:
 - (1) Learning about employment services through the CareerSource center
 - (2) Learning about the Welfare Transition program, including program:
 - (a) **Opportunities;** and
 - (b) **Obligations.**
2. Applicant support services are designed to assist the individual while applying for cash assistance. The Applicant application process may include any of the following:

- a. Complying to lift a sanction
 - b. Completing the work registration process; or
 - c. Complying with work requirements.
3. Applicant support services may be provided for up-to 30 days during the application process.

B. DIVERSION SERVICES

1. Diversion from cash assistance is a part of the work registration process. Not all individuals applying for cash assistance will need on-going assistance. Work registration provides CareerSource Staff the opportunity to assess the applicant's needs and determine if the participant:
- a. Requires assistance to help resolve an emergency need. Or
 - b. Need on-going cash assistance.
 - c. Eligibility requirements includes:
 - (1) The individual must be an applicant of TANF funded cash assistance:
 - (a) Must have filed an application for assistance with DCF; and
 - (b) The application is active.
 - (2) The individual must be:
 - (a) Potentially eligible for cash assistance.
 - (b) TANF eligible.
 - d. To meet eligibility requirements, the individual must:
 - (1) Demonstrate an emergency need.
 - (2) Demonstrate that meeting the emergency need will lead to on-going income. The applicant has **secured an on-going means for meeting monthly recurring expenses**.
 - (3) The emergency need must be documented; and
 - (4) The applicant must sign the Up-Front Diversion Agreement.

C. MANDATORY PARTICIPANTS

1. Support services should be provided to mandatory participants who are “work eligible” individuals receiving temporary cash assistance (TCA) and are required to participate in a work program. Support services are available to assist these participants with complying with work activities and other program requirements. The participant must be fully complying with the Welfare Transition Program (WTP).
 - a. Compliance includes meeting the Individual Responsibility Plan (IRP) and/or Alternative Responsibility Plan’s assigned work activities.
 - b. Any of the support services listed in Section B. above may be authorized when necessary to help individuals participate in work activities.
 - c. Mandatory participants may be authorized a 90-day childcare referral which may be renewable every 90 days.
 - d. Other support services such as education and training may be authorized when necessary to assist the customer in attaining these goals.
 - e. To be eligible to receive support services, the participant must:
 - (1) Be TANF eligible.
 - (2) Demonstrate a need for a support service; and
 - (3) Participate in program requirements.

D. DEFERRED PARTICIPANTS

1. Limited support services such as transportation assistance may be provided to participants while in deferred status. **To be eligible, the deferred participant must demonstrate the need for support services.** When evaluating need, **the Career Advisor should consider whether transportation is required** in order for the client to participate in work activities. **If the need does not exist,** transportation assistance should not be provided.
2. **If the need does exist,** transportation assistance may be provided to deferred participants who are in deferral status to assist with meeting the requirements of the Alternate Responsibility Plan. In order to receive transportation assistance, the deferred customer must **fully** comply with the requirements of the Alternate Responsibility Plan.

E. TRANSITIONAL SERVICES – GENERAL GUIDANCE

1. Florida Statutes requires participants to be notified of the ability and process to receive transitional services. Therefore, the Career Advisor must notify the participants of the

ability and the process to receive transitional services before the case closes in OSST.

Participants leaving cash assistance with earnings may receive transitional support services if the begin date of employment started prior to the closure alert received from DCF and TCA did not close due to a work program sanction. **The provisions should be briefed during the in-take process.**

2. Support services such as gas assistance and Transitional Child Care referrals may be provided to Transitional customers for up to two years. Because of limited funding, transportation will generally be limited to twelve months unless specific approval is given in advance by the CareerSource Okaloosa Walton Executive Director or Chief Operating Officer.
3. The provision of support services must be accompanied by the proof of continued employment. This means that in order to receive support services Transitional customers must be:
 - a. Employed or seeking employment if they become a dislocated worker; and
 - b. The family's income must not exceed 200% of the Federal Poverty Level.
4. Other support services such as education and training may be authorized when necessary to assist the customer in attaining these goals. Any additional support services must be approved in advance by the CareerSource Okaloosa Walton Executive Director or Chief Operations Officer.
5. The start of transitional services is based on the first month cash assistance is not received and are limited to "up to" two years from the last month of receipt of cash assistance.
6. Eligibility must be reviewed at least every _____ months to ensure the:
 - a. Participant has retained employment.
 - b. Family definition is met.
 - c. Family's income is less than 200 percent of the Federal Poverty Level.

F. TRANSITIONAL SUPPORT SERVICES

1. CareerSource Okaloosa Walton offers three categories of Transitional Support Services, which includes:

- a. **Transitional Transportation**

Transitional participants may receive transportation assistance when the TCA case is closed due to earned income. Transitional transportation assistance may be

provided for up to twelve consecutive months beginning with the first month after TCA eligibility ends, providing the Transitional customer continues to be employed; or seeking employment if they become a dislocated worker.

Transitional participants with family income that does not exceed 200% of the federal poverty level may be able to receive *transitional transportation for up to 24 months, to sustain employment or educational opportunities that promote job retention and upward, providing funds continue to be available, and with prior approval by the Executive Director or COO.* the transitional participant:

- a. Must be employed; and
- b. Support services must be employment or education related.

Note: See Paragraph K.2. of this LOP for additional information.

Transitional transportation expenses may include bus tokens or passes, transit vouchers, car repairs and gasoline. CSOW may advance payments or may reimburse against receipts or invoices for these services.

CSOW may also provide for vehicle operation and repair expenses necessary to make a vehicle functional; registration fees; driver license fees; and liability insurance for up to six months.

b. Transitional Child Care

- (1) Transitional childcare is defined as childcare for families whose income does not exceed 200 percent of the federal poverty level and:

- (a) Whose TCA has ceased due to:

- (1) New or increased employment hours; or
 - (2) Increased earnings; or
 - (3) Due to increased child support; or
 - (4) Opted not to receive TCA.

- (b) Who have been redirected from receipt of TCA through up-front diversion.

- (2) Transitional Child Care (TCC) is a support service available to Welfare Transition (WT) **participants who leave the WT program with employment; to applicants of TCA** who are diverted from on-going cash assistance through **Up-Front Diversion**; as well as **Relocation Assistance recipients**. These individuals may receive TCC for up to 24 months while they are employed or actively seeking employment, providing the family's income does not exceed 200% of the federal poverty level, and funds are available.

- (3) Former recipients of TCA, Relocation Assistance recipients and diverted applicants of TCA must meet general eligibility criteria to receive TCC:
- (a) Individuals must be employed.
 - (b) A child under the age of 19, included in the grant calculation, must remain in the home. This includes children who would be included in the grant except the child receives Supplemental Security Income (SSI); and
 - (c) The family's income must always remain below 200% of the Federal Poverty Level. And
 - (d) The family has a documented and verified need for TCC.

Note: Each population of individuals eligible to receive TCC has specific eligibility criteria as well.

- (4) CSOW may authorize childcare for the hours of employment and reasonable time to travel to and from the childcare facility and the place of work activity/employment and return. The family will be required to contribute to the cost of childcare through a parent co-payment using the fee schedule established by the local School Readiness Program or Early Learning Coalition.
- (5) Participants who lose eligibility for TCA due to earned income or who opt to receive an up-front diversion payment are eligible to receive transitional TCC while they actively seek employment, continue employment and improve their employment prospects.
- (6) If the participant's case is terminated by DCF, and the participant subsequently reports employment that started prior to case closure, the participant may be able to receive TCC.
- (7) If the individual loses their job rather than quit their job, or have **good cause** for quitting their job, and was previously eligible for subsidized childcare, they may continue to receive subsidized childcare while they look for other employment. ***The maximum period of this extension is 30 days. The subsidized childcare assistance will be provided only for actual job search.***
- (8) If the participant reports a termination due to good cause, a self-attestation will be sufficient documentation. According to the FAC, good cause reasons for the termination of employment include:
- (a) The position ends (i.e. job layoffs, business closure).

- (b) Job requirements are illegal or against the moral or religious beliefs of the individual.
- (c) Working conditions or job duties could be harmful to the physical or mental health of the individual.
- (d) Sexual or racial discrimination or harassment on the job.
- (e) Change in job requirements for which the individual is not qualified.
- (f) Change in hours or location of employment that is not feasible due to childcare or transportation arrangements; or
- (g) Family or health problems of the individual or children requiring an extensive period of time off, which the parent is unable to arrange with the employer.

c. Transitional Education and Training

Former recipients of TCA who are working or actively seeking employment and desire to improve their employment prospects by upgrading their skills through Transitional Education are eligible to receive employment-related education, training, and related support services, such as childcare and transportation, to continue training or to upgrade skills for up to two years after the family no longer receives assistance, providing the family's income does not exceed 200% of the Federal Poverty Level and funds are available. To be eligible the transitional participant:

- (1) Must be employed.
- (2) The support service must be job related.
- (3) May include to improve job skills in participants existing area of employment;
or
- (4) The training may be to prepare for employment in another career.

Note: See Paragraph K.2. of this LOP for additional information.

G. UPFRONT DIVERSION PARTICIPANTS

1. Individuals who are applying for TCA may receive Up-Front Diversion instead of receiving recurring cash assistance. Individuals who are diverted from TCA through Up-Front Diversion may receive TCC for up to two years as long as the family's income does not exceed 200% of the Federal Poverty Level.
2. Individuals diverted from on-going cash assistance have 90 calendar days from the Up-Front Diversion process start date to secure and provide verification of employment to be eligible to receive TCC.

3. Once an applicant has started the eligibility process for Up-Front Diversion, (s)he may receive applicant childcare for 30 days. The start date of the 30-day applicant childcare is determined by the date entered on the 2073 (A), The Up-Front Diversion Screening Form.
4. If the recipient of Up-Front Diversion does not obtain and provide verification of employment within 90 calendar days from the start date of the Up-Front Diversion process, (s)he is not eligible to receive TCC.
5. If employment is not secured during the first 30 days of the 90-day time frame the Up-Front Diversion recipient would be responsible for obtaining childcare. However, if employment is secured during the remainder of the 90-day time period, (s)he would be eligible for TCC if all other factors of eligibility were met.
6. If Upfront Diversion is approved the client will be eligible to receive Transitional Childcare for:
 - a. Up to two years while employed; or
 - b. Seeking employment if they become a dislocated worker; and
 - c. As long as the family's income does not exceed 200% of the Federal Poverty Level.

H. PARTICIPANT'S SUPPORT SERVICES BUDGET

1. The budget for each participant's support services is dependent on the CareerSource Okaloosa Walton's TANF allocations received from the Department of Economic Opportunity. Each participant's budget should be set at a maximum amount of \$1,200.00 each Program Year or \$100.00 per month based on the number of months remaining in the Program Year at the time the account is setup.
2. A review of the CareerSource Okaloosa Walton's support services budget should be conducted at least semi-annually to determine if changes are needed. Under some circumstances an increase in the participants' support services budget may be authorized if approved in advance by the CareerSource Okaloosa Walton Executive Director or Chief Operating Officer.

I. PARTICIPANT'S SUPPORT SERVICES BUDGET YEAR

The budget year for the TCA participant will begin on the date the customer is initially approved for a support service and will renew at the beginning of each Program Year. Thus, no one client should receive more than the allowable \$1200.00 per Program Year unless pre-approved by the CareerSource Okaloosa Walton Executive Director or Chief Operating Officer. The Career Advisor should review the participant's open and closed support accounts in Gazelle and OSST prior to requesting a support service.

J. TRANSPORTATION ASSISTANCE

1. Transportation expenses for participants may include bus tokens or passes, transit vouchers, car repairs, and gasoline. Staff may pay participants for transportation in advance or reimburse against receipts or invoices.
2. Customers should be encouraged to think creatively regarding transportation alternatives. For example, carpooling, biking, or walking should be explored. In all cases, safety must be considered. Selection of activities should consider transportation availability and the needs of the Customer. When assessing a customer's transportation needs, the WT Career Advisor should explore the following options with the customer:
 - a. Customers should be highly encouraged to utilize mass or public transportation if at all feasible for their situation.
 - b. Coordinated Transportation.
 - c. Taxi, if reasonable; and
 - d. Purchase of bicycle for transportation when appropriate.
3. The WT Career Advisor may provide transportation assistance to Mandatory customers who are fully complying with the requirements of WTP, including the Individual Responsibility Plan (IRP); and who are meeting the participation requirements for the assigned work activities. TCA participants may receive transportation assistance loaded on to a debit card on a weekly basis if needed to participate in an allowable work activity; and, when completing the assigned hours of participation each week. Participation hours must be verified and documented in OSST at least every two weeks.

4. Verifying Transportation Costs

MapQuest or Google Maps should be used to determine the mileage the participant will travel in order to participate in required activities. Mileage is tracked using the printout sheet from the computer or other media access device. Mileage will be reimbursed at the current rate used by CSOW for its employees.

K. BACKGROUND CHECKS

1. The TANF program does not have a requirement for background checks to be completed on participants. If an individual is placed in a Work Experience, OJT, or Community Service component, and the employer at the site requires a background check, CSOW may pay for it through supportive services.
2. Background checks for TANF clients are only allowed if necessary, for or required by a specific Work Experience or Community Service work site as a condition to placing the client at the work site. ***The client must be informed and must consent to the background check and sign a Release of Information Form.*** The participant can

refuse to have the background check conducted. The refusal would not be considered noncooperation, and another work site should be developed for the client.

3. Background checks may also be required for job skills training, vocational training, post-secondary education, and in an occupation requiring a background check; and, if necessary, corroboration with the educational or training institution.
4. CSOW would not normally conduct a background check on a client for an On-the-Job Training (OJT) employer unless the employer also requires a background check for all their applicants or new hires. If the OJT employer generally pays for this, then CSOW would not. CSOW do not want its participants treated differently than other applicants or employees of employers.

L. STANDARDS RELATED TO TRANSPORTATION ASSISTANCE

1. An auto repair is allowable support service expenditure when necessary for a WT client to participate in work activities. The following restrictions apply:
 - a. The vehicle must be registered in the customer's name. A copy of the vehicle registration or proof of ownership must be attached to any repair documentation and included in the case file.
 - b. A minimum of three written estimates from a facility licensed under FS 559.904 or from a facility meeting the guidelines located in the local General Policies Manual, whichever is more restrictive, must be provided by the client prior to the Career Advisor requesting approval for repairs. If the automobile is inoperable, and located at a specific repair facility, one estimate may suffice provided the facility is licensed under FS 559.904 or the facility meets the guidelines located in the local General Policies Manual, whichever is more restrictive. The estimate(s) must be filed in the case file.
2. Support service funds may be used to obtain or renew a customer's driver's license, car registration, and up to three months of liability insurance for one automobile. If extenuating circumstances exist, the WT Career Advisor may request approval for up to six months of liability insurance for one automobile; and, other fees related to operating the vehicle. However, such a request must be pre-approved by the CareerSource Okaloosa Walton Executive Director or Chief Operating Officer.

M. CLOTHING

Suit-Up-to-Move-Up should always be considered as the first alternative for addressing clothing needs. Clothing vouchers are to be provided only when Suit-Up-to-Move-Up is not appropriate or accessible. If an individual is in need of suitable clothing for required pre-employment activities or to accept or retain unsubsidized employment, the participant may be issued a clothing voucher or a support service request may be made following the proper procedures for the purchase of necessary clothing and accessories. As with all support

services, this assistance must be recorded in OSST and Gazelle and included in the client's budget. The only items that do not have to be reported in Gazelle are items that do not require expenditure of WT funds, i.e. Goodwill clothing vouchers.

N. UTILITIES

1. The Safe Link and Lifeline Assistance Program Florida are designed to ensure that all residents of Florida have access to telephone service and connections in their homes. WT customers may qualify for this program. The program is open to all of Florida's residents. Individuals may qualify if they receive Food Stamps, Medicaid, Temporary Cash Assistance, Low Income Home Energy Program, Supplemental Security Income, and other low-income programs. The WT Career Advisor should share this information with their customers.
2. Customers of AT&T, Embarq or Verizon at or below 135% of the poverty level, **but who are not currently receiving benefits from one of the listed programs**, may be able to qualify for the Lifeline telephone assistance by contacting the Office of Public Counsel in Tallahassee.
3. Because telephone communication is often a necessary and beneficial instrument in required job search and responsible post-employment interaction with employers, support service funds may be issued for installation of basic in-home phone service. Before expending support service dollars, the WT Career Advisor should determine if the customer qualifies for Safe Link and Lifeline Assistance Program Florida. **Support service funds may not be used to pay for a customer's past due obligations or fines or on-going monthly service.**
4. Because running power and water are critical for establishing and maintaining self-sufficiency for customers and their families in their homes, **support service funds may be used in emergency situations to pay past due obligations to prevent the customer from losing power or water service to their home.** Customers should be referred to the Low-Income Energy Assistance programs or other like programs designed to assist with basic utilities. **Support service funds may not be used to pay for on-going monthly utility services.**

O. EMERGENCY HOUSING ASSISTANCE

Support service funds may be provided to assist TCA customers in obtaining or retaining housing in the event that a customer can provide documentation that shows that they require a deposit in order to obtain housing and no other alternatives exist; or they require assistance with paying rent in order to avoid eviction from their current housing situation. A one-time assistance may be provided on an emergency basis only. The request must be

pre-approved by the CareerSource Okaloosa Walton Executive Director or Chief Operations Officer.

P. INCENTIVE AWARDS

1. The purpose of incentives for Welfare Transition customers is to encourage attainment of self-sufficiency goals during TCA and while participating in the Welfare Transition program. Welfare Transition staff are encouraged to promote incentives among all Welfare Transition customers. **WT Career Advisors are strongly encouraged to develop innovative, non-cash customer appreciation incentives to supplement Board funded incentives.** Such innovations for the Customer Appreciation Incentive Program may include non-monetary incentives such as giving Certificates of Completion for attaining significant goals; or having a presentation to celebrate the attainment of employment; or incentives developed in conjunction with employers or business partners. The Customer Appreciation Incentive Program is in addition to incentives included in the CareerSource Okaloosa Walton **Welfare Transition Supportive Services/Incentive Plan** (Appendix A).
2. Incentive award amounts may change based on the Welfare Transition Program budget, caseload size, and performance strategies. All customer incentives will be in the form of money loaded on to a debit card rather than cash.
3. The attached Workforce Board's CareerSource Okaloosa Walton **Welfare Transition Supportive Services/Incentive Plan**, which includes incentive awards may be distributed separately from this policy but should be considered as a part of the policy. The Plan may be changed by CareerSource Okaloosa Walton to align with changes to the budget, caseloads, and performance strategies without requiring a modification to the policy.
4. Educational Incentives *may* be awarded for attaining benchmarks such as Education Attainment of a High School Diploma, GED, Vocational Certificate awarded by an accredited educational institution, AA or AS Degree, a BA or BS degree, or Ready to Work Certificate, etc.

Q. TRACKING SUPPORTIVE SERVICES AND EXPENDITURES

1. **Career Advisors are required to track supportive services in both the Gazelle Client Services System and the One-Stop Services Tracking (OSST) System:**
 - a. Gazelle Client Services System
 - (1) Supportive services request that require a Purchase Order or a Check Request will be tracked in the Gazelle Client Services System. Credit Card purchases will be case noted and tracked in Gazelle. Applicable supporting documentation must be maintained in each customer's case file.

- (2) Debit card transactions and incentive cards will be tracked using the Gazelle system, should be signed for by the customer. If the customer is not available to sign for the item or the Gazelle system is unavailable during the customer's appointment each debit card request should be accompanied by the proper documentation showing that the customer earned the incentive. All documentation must be maintained in the customer's Atlas file. Signatures should be obtained at the earliest possible opportunity. The check request from Gazelle for the debit card transaction must also be maintained in the Atlas file.

b. One-Stop Services Tracking (OSST) System – Service Plan

- (1) Supportive service requests and the amounts provided will be tracked in OSST by updating the **Service Plan** located in the **Skill Development Module**. Applicable supporting documentation must be maintained in each customer's case file in ATLAS. OSST should generate an auto case note. If not, or if further clarification is needed, please enter a case note in OSST.
- (2) The **Service Plan** provides a starting point to do several actions, including:
 - (a) Adding a Service budget amount for a customer.
 - (b) Adding a new service provider.
 - (c) Searching for a service provider; and
 - (d) Recording an outcome for a service.
- (3) Once services have been added to the customer's case, the **Service Plan** provides a view of the customer's service history, including:
 - (a) Service type.
 - (b) Start date of the service.
 - (c) End date of the service.
 - (d) Status of the service.
 - (e) Number of days enrolled in the service; and
 - (f) Total cost of the service.

c. One-Stop Services Tracking (OSST) System – Benchmarks

- (1) All support services provided must be recorded in OSST. Documentation to support the amounts entered in OSST must be filed in the participants case file in ATLAS, along with any required case notes. Examples of acceptable documentation include: Mileage logs signed by the participant specifying the amount, invoices, vouchers, etc. Map Quest or Google Maps computer printouts showing the number of miles involved and the CSOW WT Statement of Need and Value, along with any other required supporting documentation may also be used.

- (2) Career Advisors are responsible for entering work activity data directly into OSST which is used to extract required elements from it for monthly and quarterly reports. Data entered should only include the supportive service or incentive that is being provided to the participant and the actual cost associated with that service. To assist staff with entering the appropriate data in OSST, the following benchmarks have been created to categorize the supportive services and incentives entered in OSST:

- (a) Benchmark 1 – Entered Employment
- (b) Benchmark 2 – Educational Achievement
- (c) Benchmark 3 – Transitional Employment – 30 Days
- (d) Benchmark 3 – Transitional Employment – 60 Days
- (e) Benchmark 3 – Transitional Employment – 90 Days
- (f) Benchmark 4 – Transitional – Educational Achievements / Certification
- (g) Benchmark 5 – Support Services-Other

Note: Staff will continue to document support services and incentives in a case note in OSST until the benchmarks above are fully implemented.

R. CLIENT SERVICES DOCUMENTATION

1. The DEO Sub-Grantee Agreement states that subrecipient **must** maintain documentation supporting the eligibility of the receipt of supportive services and that the **value of the supportive service is consistent with the documented need of the participant**. To meet the above requirement, staff must complete the **Statement of Need and Value** (Attached to this LOP) on each participant before authorizing support services.
2. **The Welfare Transition Supportive Services/Incentive Plan** may be developed for each Program Year or as needed to meet the needs of the Program. The amount listed on the Support Services Plan will serve as a cap for the services listed on the Plan and will be effective until a new Support Services Plan is developed for the Program Year.
3. The following is a list of documentation that should be included with support services request, as appropriate: (See the LOP on Procedures for Processing Supportive Services).
 - a. OSST Case-at-a- Glance Screen showing the status of the individual and verifies that the individual is an active Mandatory client or Transitional customer.
 - b. Employment Verification (if appropriate).
 - c. OSST print out of screen showing applicable Activities.
 - d. OSST print out of applicable Case Notes.
 - e. Check Request or Purchase Order.
 - f. Statement of Need and Value.

- g. The following additional documentation is required for auto related support services:
- (1) Car Title or proof of ownership.
 - (2) Copy of unexpired drivers' license.
 - (3) Proof of Insurance Coverage (unless procurement of coverage is the item being requested).
 - (4) At least three written estimates if the vehicle is not already disabled at a garage.

S. 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 CareerSource Okaloosa Walton's Policy on confidentiality for additional information.

T. SUGGESTIONS FOR CHANGES OR WAIVERS

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

U. ACTION REQUIRED

The CSOW staff in Okaloosa and Walton Counties responsible for implementing the Welfare Transition Program is required to implement this supportive services policy upon receipt.

V. Training Hours: 2.5 hours.