State Economic Security for All (EcSA) Program Policy

Policy Number: **P-1017, Rev. 2**

Revision Date: August 1, 2023

Supersedes: State Economic Security for All (EcSA) Program Policy, effective August 20, 2022

PURPOSE

To communicate guidance and instructions for the State Economic Security for All (EcSA) program that is supported by **Washington State General Funds** (as distinct from federal EcSA funded by WIOA Title I Governor's statewide activities funds).

This policy is revised to:
- Expand services to eligible individuals with income over 200% of the Federal Poverty Level (FPL) In alignment with ESD WIN 0129, Rev. 2 – *State Guidance and Instructions for the State Economic Security for All (EcSA) Program*.
- Editing and formatting for clarity.

BACKGROUND

The priority of the State EcSA funds is to accomplish the following:

1. Meet or exceed our local and statewide goals for the number of individuals who achieve self-sufficiency.
2. Bundle WIOA and non-WIOA services (Supplemental Nutrition Assistance Program, housing, and others).
3. Establish and implement customized career plans that will assist recipients of State EcSA services reach 100% of their Income Adequacy, as established by the UW self-sufficiency calculator.
4. Provide extensive wrap-around services and continue to bundle benefits while recipients of State EcSA services pursue their customized career plan and reach self-sufficiency.
5. Include Black, Indigenous, and People of Color communities, rural communities and people experiencing poverty in program design and implementation.
6. Work collaboratively across local, state, and federal levels to remove barriers to coordinated delivery of multiple benefits.

The success of WorkForce Central and its sub-grantees in accomplishing these goals will be measured based on meeting or exceeding the following criteria:

- The number of eligible individuals enrolled in the program.
- The number of eligible individuals enrolled in training services that will lead to a career with starting wages above their self-sufficiency goal.
- The number of individuals enrolled in the program who earn income above their *self-sufficiency goal.

- o Note: This is not an exit-based measure and can be counted at any point of an individual's engagement in the State EcSA program. Positive attainment of self-sufficient income should be reported in ETO as soon as possible and does not necessitate an exit from the program to be counted. Individuals may remain engaged in the State EcSA program as long as is necessary to ensure long term self-sufficiency.
  - o ***Self-Sufficiency** for the State EcSA program is **defined as attainment of 100% of individualized household income adequacy, as established through use of the UW Self Sufficiency Calculator.**
- The proportion of BIPOC (Black, Indigenous, and People of Color), unhoused, and residents of rural communities who are served by the State EcSA program and the collaborative efforts implemented to increase the number of individuals representative of these communities who are served by the State EcSA program over time.
- Meet program expenditure goals on the schedules set in the contract.

To facilitate the tracking of these criteria, WorkForce Central must provide quarterly reports to ESD in a specific format defined in the State EcSA contract between ESD and WorkForce Central.

For the purposes of tracking enrollments in the State EcSA program, there are two numbers that will be considered. First, the total number of enrollments. This is a straightforward counting of all individuals who are enrolled into the State EcSA program. The second is the total number of unique individuals enrolled across the State and Federal EcSA programs. Example: If an LWDB has a requirement for 30 Federal EcSA participants and 30 State EcSA participants, their requirement for general enrollment in State EcSA is 30, and their requirement for total unique individuals enrolled between the two programs is 60, regardless of whether individuals are co-enrolled in both State and Federal EcSA.

POLICY

To properly measure accomplishment of these goals, WorkForce Central and its providers of State EcSA services are expected to comply with the following minimum requirements. Service providers are authorized to implement additional conditions but may not impose more lenient requirements than what is outlined in this policy.

Early Contract Performance

The State Legislature has allocated these funds to increase the number of families experiencing poverty served through local EcSA models. These funds have a **one-year period of performance**, and the WA State legislature expects to see immediate results to justify the continuation of this state funding allocation. Local Workforce Development Boards (LWDBs) are expected to remain on target to reach their contractual outcome targets over the course of the period of performance. The ESD Grants Management Office (GMO) and EcSA Technical Advisory committee will carefully assess performance each quarter and will work collaborative with LWDBs to redistribute funds to areas that are meeting or exceeding performance and spending targets.

ETO (State MIS)

Where applicable, enrollment, eligibility, services, and all other aspects of the State EcSA Program must be recorded in ETO as described in WorkForce Central's ETO Data Validation and Documentation Policy, including ensuring services are recorded within seven (7) calendar days of service delivery, and the documentation of Department Head review and corrections.

See Attachment A for ETO enrollment procedures.

UW Self-Sufficiency Calculator

The UW Self-Sufficiency Calculator will be utilized at program enrollment to determine an individual's self-sufficiency needs and again upon reaching self-sufficiency or at program exit to demonstrate whether self-sufficiency goals have been achieved. The recorded results may be updated as circumstances require. See Attachment C for UW Self-Sufficiency Calculator instructions.

Customer information collected through the UW Self-Sufficiency Calculator must be stored in a manner that allows ESD and the designated contractor overseeing the implementation of the self-sufficiency calculator to collect and record this data to assess performance. See instructions for uploading UW Self-Sufficiency Calculator.

WorkForce Central will designate a local Point of Contact who will manage reporting on the use of the calculator and the data collected.

Eligibility Documentation Requirements

Documentation of the following State EcSA program eligibility criteria must be uploaded in ETO:

- Pierce County residency
- U.S. Citizenship or otherwise legally entitled to work in the U.S.
- Age: WorkForce Central's State EcSA Program minimum age requirement is age 16 or older to qualify for any of the WIOA Title I formula programs.
- Income status
  - Household income is below the 200% of the Federal Poverty Level (FPL)
  - Household income is above 200% yet below their self-sufficiency goal, or determined to be likely to fall into poverty (as documented in program enrollment case notes recorded in ETO). Such factors may include but are not limited to:
    - Recent loss of employment
    - End of unemployment insurance payments or other benefits
    - Loss of housing

To better facilitate co-enrollment into WIOA Title I programs and monitoring activities, documents permitted to satisfy the above are the same as those designated in WorkForce Central's WIOA Title I Program Eligibility, Enrollment, and Documentation Policy Handbook, located on WorkForce Central's Policy Library.

Enrollment

Enrollment into the State EcSA program must include the following and be uploaded into ETO:

- Completed and signed paper State EcSA registration form
- Verification of program eligibility
- Comprehensive assessment
- UW Self-Sufficiency Calculator results
- Individual Employment Plan (IEP)
  - The IEP must include the development of a career plan and results of the U.W. Self-Sufficiency Calculator and recorded in ETO under the **"State Funded Development of Individual Employment Plan"** service. The career plan must include specific State EcSA elements of the State EcSA program enrollment including how the results of the U.W. Self-Sufficiency Calculator support the customer's State EcSA career plan. The "State Funded Development of Individual Employment Plan" service must be recorded in ETO within 30 calendar days of the State EcSA program enrollment.
  - If an IEP has already been developed as a result of prior enrollment in a WIOA Title I program, the IEP from the previous program may be used, but must be updated with the

data from the UW Self-Sufficiency Calculator, and an explanation as to how the State EcSA program will be used to help the State EcSA recipient reach self-sufficiency.

- Authorization to Share Confidential Information and Records Form
- Washington State Freedom from Discrimination-Declaration of Civil Rights form

Directions for uploading the above documents are the same as those in WorkForce Central's ETO Data Validation & Documentation policy on WorkForce Central's Policy Library. For uploading UW Self-Sufficiency Calculator results, see Attachment A, Section E, Uploading Documentation from the UW Self-Sufficiency Calculator.

Co-enrollment into other WIOA Title I Programs

One of the major goals of the State EcSA program is the promotion of a holistic approach to fighting poverty. For this reason, co-enrollment in any program that will assist individuals to that end is encouraged. However, WorkForce Central prohibits co-enrollment into both the Federal EcSA program and the State EcSA program. Please note, that eligibility for the State EcSA program does not supplant the eligibility criteria for any other program. WorkForce Central and its subrecipients must ensure individuals meet the specific eligibility requirements prior to enrollment in other programs.

The above list of State EcSA enrollment documents, except for self-sufficiency calculator results, is waived for State EcSA-eligible individuals currently enrolled in a WIOA Title I program and who later co-enroll into the State EcSA program. Service providers must document in case notes recorded in ETO the waiving of the State EcSA program enrollment documents and confirmation the individual meets the State EcSA program eligibility at the time of enrollment into the State EcSA program.

If an individual first enrolls into the State EcSA program prior to co-enrollment into a WIOA Title I program, the above list of State EcSA program enrollment documents is required at the time of the State EcSA Program enrollment. If at any time a State EcSA enrolled individual co-enrolls into a WIOA Title I program, the WIOA Title I enrollment documentation must be completed at the time of their WIOA Title I program enrollment as outlined in WorkForce Central's Eligibility Enrollment and Documentation Policy.

Allowable State EcSA Services

Services listed in the State EcSA Services Catalog (Attachment B) and commonly provided by WIOA Title I programs are automatically approved for the State EcSA program. WorkForce Central does not authorize the use of State EcSA Basic Services.

State EcSA individualized services are not entitlements and must be provided on the basis of demonstrated need and individual circumstances, as documented in the customer's ETO record.

WorkForce Central does not limit the funding for supportive, work-based, or training services for individuals of households **under 200% FPL.** State EcSA service providers have discretion to award funds in accordance with their internal policies, budget limitations, number of customers to be served, and the unique needs of every customer. Service providers must ensure equitable treatment and access to services.

WA State limits State EcSA funding for individuals whose family households are **above 200% FPL**. State EcSA funding may not exceed $5,000 spent on incentives, support services, and training costs combined for any single participant. This does not include the cost of staff support or career services provided to the participant. This limit is exclusively applied to the State EcSA program and does not include any costs paid by other funds such as WIOA Title I or Federal EcSA.

- **State EcSA Supportive Services**

The amount and type of support services provided to clients must be tracked in ETO in accordance with the guidance provided in Attachment A, section C of this policy. Allowable supportive services, as outlined in WorkForce Central's Supportive Services Policy posted on WorkForce Central's Policy Library are allowable under the State EcSA program. In addition, the following supportive services not commonly provided through WIOA Title I programs are allowed through the State EcSA program:

- o Food Assistance:
  - ETO and invoicing documentation requirements:
    - Justification for the supportive service, and the anticipated and actual expenditures must be documented in case notes
    - Completed and signed State EcSA Supportive Service Request Form/Voucher
    - Itemized receipt of purchased food items

- o Family Housing and Rental assistance:
  - ETO and invoicing documentation requirements:
    - Justification for the supportive service, and the anticipated and actual expenditures must be documented in case notes
    - Completed and signed State EcSA Supportive Service Request Form/Voucher
    - Copy of rental agreement, other housing-related documentation that shows the amount of rent, mortgage, moving costs, etc.
    - Receipt of payment
- o Other supplies or services not normally authorized under WIOA Title I funding that if not provided may negatively impact the success of the individual enrolled in the State EcSA program.

Supportive services not authorized under the State EcSA program include, but is not limited to:

- Supportive services purchased prior to the individual's program enrollment.
- Fines and penalties resulting from violations of, alleged violations of, or failure to comply with federal, state, tribal, local, or foreign laws and regulations (e.g., traffic violations)
- Interest payments.
- Entertainment, including tips.
- Contributions or donations.
- Alcohol, tobacco, or marijuana products.
- Pet food.
- Out-of-state job search expenses that are paid for by the prospective employer.
- Relocation expenses that are paid for by the prospective or new employer.
- Admission fees and other expenses associated with graduate degree programs.
- Any other item that is not required for the individual to successfully complete their training and employment goals.

To avoid financial implications for customers receiving DSHS or other needs-based assistance, WorkForce Central is not authorizing the use of State EcSA funds for stipends that are authorized under State EcSA Program policy.

- **State EcSA Work Experiences (WEX) and On-the-Job Training (OJT)**

The provision of State EcSA WEXs and OJTs must be in compliance with WorkForce Central's Work Experience (WEX) Policy and On-the-Job Training (OJT) Policy posted on WorkForce Central's [Policy Library](#).

- **State EcSA Training Services**

State EcSA funding may pay for the following training costs:

- o Instructor salaries and benefits
- o Classroom space
- o Instructional materials
- o Tuition
- o Books
- o Academic fees
- o School supplies
- o Educational testing and certification
- o Equipment and tools
- o Prerequisite training to a vocational training program if the prerequisite training is required by the educational institution.
- o Other required items or services that are listed on a school syllabus or other official school documentation.

State EcSA funded training must be listed on the WA State's Eligible Training Provider List (ETPL) or other state's eligible training lists. WorkForce Central may, on occasion, waive ETPL requirements. The email documenting WorkForce Central's authorization to waive the ETPL requirement must be uploaded into the training service touchpoint in ETO.

WorkForce Central requires the following documentation to support State EcSA funded training services:

- o Comprehensive assessment results identifying:
    - A need for training services to obtain or retain employment leading to self-sufficiency, defined as attainment of 100% of individualized household Income Adequacy as established through use of the UW Self Sufficiency Calculator, and
    - The customer has the skills and qualifications to participate successfully in training services.
- o An Individual Employment Plan (IEP) that identifies the selected training program. The selected training program must align with the individual's documented career goals.
    - The IEP must include the anticipated and actual start dates of training, training completion date, and credential earned.
- o Documentation validating actual start date of training.
- o The customer's grades/progress throughout the training program. Satisfactory progress is required for ongoing State EcSA training support.
- o Training outcomes.

- o   Case notes as appropriate.

Documentation for the above criteria must be uploaded into the applicable training service recorded in the individual's ETO record in accordance WorkForce Centrals' ETO Data Validation and Documentation Policy posted on WorkForce Central's [Policy Library](#).

In addition to the approved services and activities above, WorkForce Central may request additional allowable uses for local funds by submitting a request to ESD as outlined in [Attachment A of ESD's WIN 0129, Rev. 2-State Guidance and Instructions for the State EcSA Program.](#)

Monitoring:

WorkForce Central's State EcSA program will be monitored by the ESD Monitoring Unit at a time and in a manner to be determined in consultation between the ESD Grants Management Office, the ESD Monitoring Unit, and WorkForce Central. WorkForce Central will conduct ongoing monitoring and oversight of the subrecipient's compliance through monthly program and fiscal invoice and ETO reviews, in the same frequency and manner as its WIOA Title I programs.

REFERENCES

- Engrossed Substitute Senate Bill 5693, page 463
- ESD Policy 1013, Rev. 4
- ESD Policy 1024 Rev. 2
- ESD WIN 0129, Rev. 2

APPROVED

_____   Aug 1, 2023
Katie Condit (Aug 1, 2023 14:38 PDT)
Katie Condit, WFC CEO   Date

Attachment A – ETO Guidance

A. Enrolling a Customer

1. First, ensure the customer has an account on worksourcewa.com.
   a. Several demographic fields can only be filled in by an account on worksourcewa.com, making a fully completed and up-to-date account vital.
   b. If a customer is not in ETO, they do not have a fully completed account on worksourcewa.com.
   c. A customer's status may be checked by visiting their dashboard and selecting **"Access Seeker/ Participant Account"**.

   d. If the customer does not have an account on worksourcewa.com, the following message will appear:

2. If the customer does have an account, ensure their profile is completed in full.
   a. The profile can be reached by clicking on the person in the upper right corner of the page and clicking "**profile**."
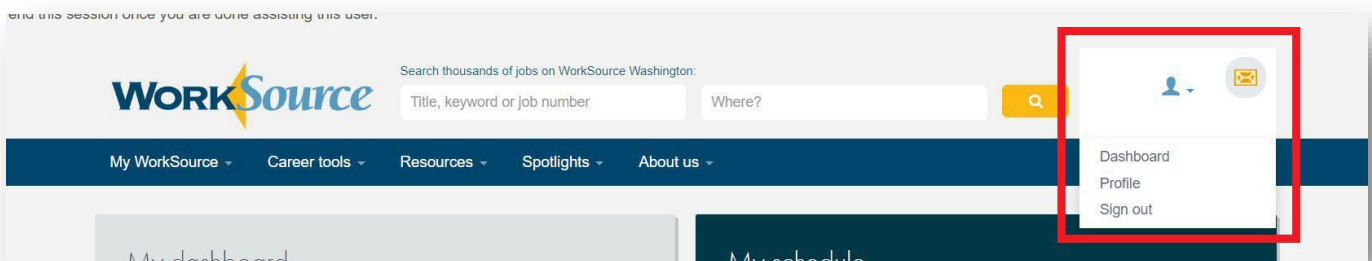
   b. Next, ensure every field is completed.
      i. Some customers selected "no" on the question "would you like to be assessed for additional services".
      ii. If this is the case, change the answer to "**yes**" and fill in the answers in order for ETO to have complete demographic information.

3. After the account is fully completed and up to date, the enrollment process begins.
   a. From the client dashboard, select "**new**" in the area titled "Most Recent Program Enrollments"

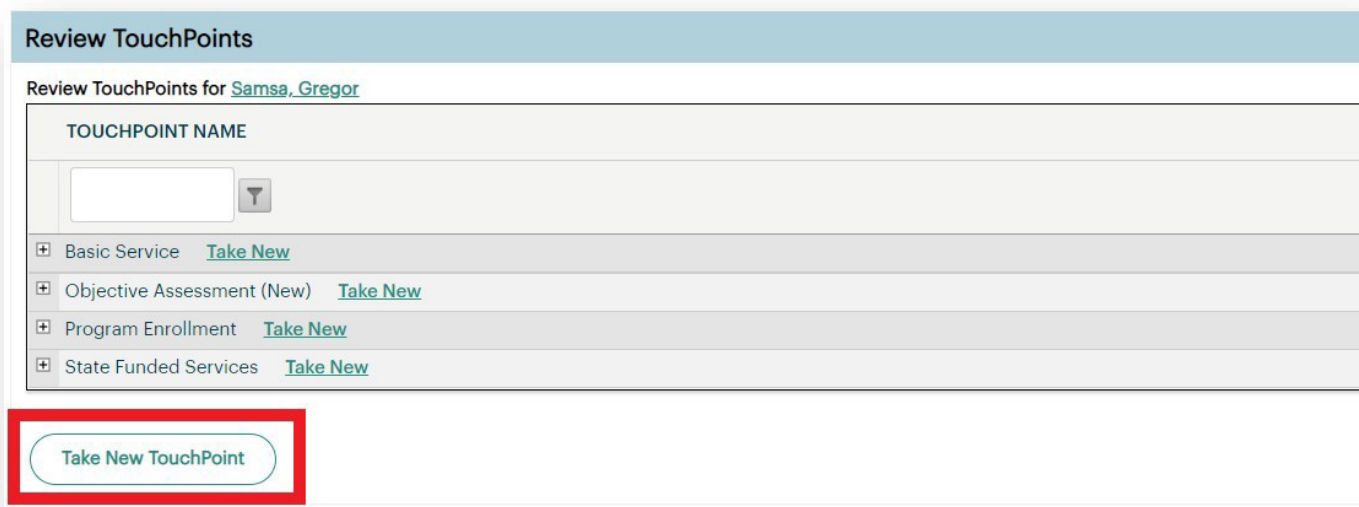4. Select **"State Economic Security for All"** from the dropdown, and:
   a. Fill in all information requested including the question regarding whether the customer is above 200% of the FPL,
   b. Then save.

5. Completing the State EcSA program enrollment includes the development of a career plan, which includes the U.W. Self-Sufficiency Calculator, and is recorded in ETO under the **"State Funded Development of Individual Employment Plan"** service. The career plan must include specific State EcSA elements of the State EcSA program enrollment including how the results of the U.W. Self-Sufficiency Calculator support the customer's State EcSA career plan. The "State Funded Development of Individual Employment Plan" service must be recorded in ETO within 30 calendar days of the State EcSA program enrollment.

B. Adding a Service

a. To take a new touchpoint in the State EcSA program, first go to the customer's ETO dashboard and select **"Review Seeker/Participant Touchpoints."**
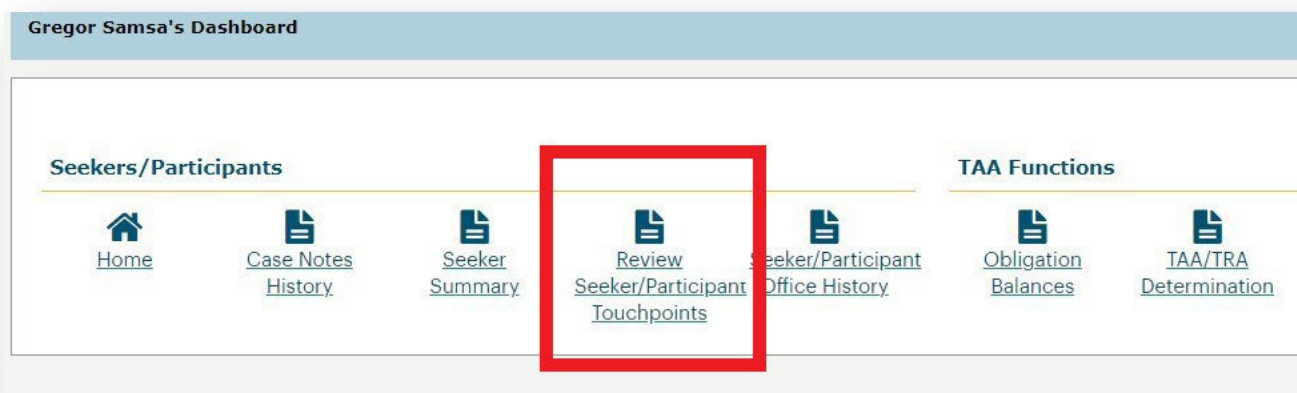
b. From there, select "**Take New Touchpoint**," at the bottom of the list of touchpoint names:

c. From the dropdown list that this provides, select **"State Funded Services."**

d. **Select the date** the service was provided.

e. Next, **using the State EcSA Services Catalog**, determine the proper service, and **select from the individualized dropdown list**. Please note: WorkForce Central does not authorize the use of State EcSA Basic Services.

f. Complete the touchpoint, making sure to **answer all fields provided** and **record a case note**.

C. Tracking State EcSA Supportive Services

To fulfill new state reporting requirements, supportive services provided for childcare, housing, auto repair, and transportation must be tracked. To facilitate this, additional options have been added to **State Funded support Service touchpoints** in ETO.

1. To track childcare, housing, or automotive repair, select the applicable option from the new dropdown field in the touchpoint:

2. After selecting the applicable option (childcare, housing, or automotive repair) enter the amount provided for the supportive service. The touchpoint is otherwise unchanged.

3. If the supportive service does not fit into any of the three options listed above, select "Other" from the dropdown menu and complete the following:

4. The provision of transportation supportive services are not tracked using the above dropdown option. Transportation supportive services are tracked by recording the corresponding touchpoint in ETO.

D. Recording a Program Completion

1. Create a new **Outcome, Program Completion TouchPoint**.
2. Select **State Funded Economic Security for All (EcSA)** from the active program enrollment dropdown menu.
3. Complete **Outcome, Program Completion TouchPoint** data elements as appropriate for the customer.
4. Record if the customer is "**employed at outcome**".
5. Enter **annualized wages** – multiply hourly wage X planned hours per week X 52 weeks.

E. Uploading Documentation from the UW Self-Sufficiency Calculator

To ensure documentation is available for monitors and other individuals reviewing the ETO record who may not have access to the UW Calculator, a copy of the results must be uploaded to ETO.

For ease of tracking, please name files using the following naming convention: *"First Initial, Last Name-UW Calc-ETO#-Date"* (ex. *GSamsa-UWCalc-760514-06142022*)

1. From the "Record Touchpoints" section, select "Uploaded Files."
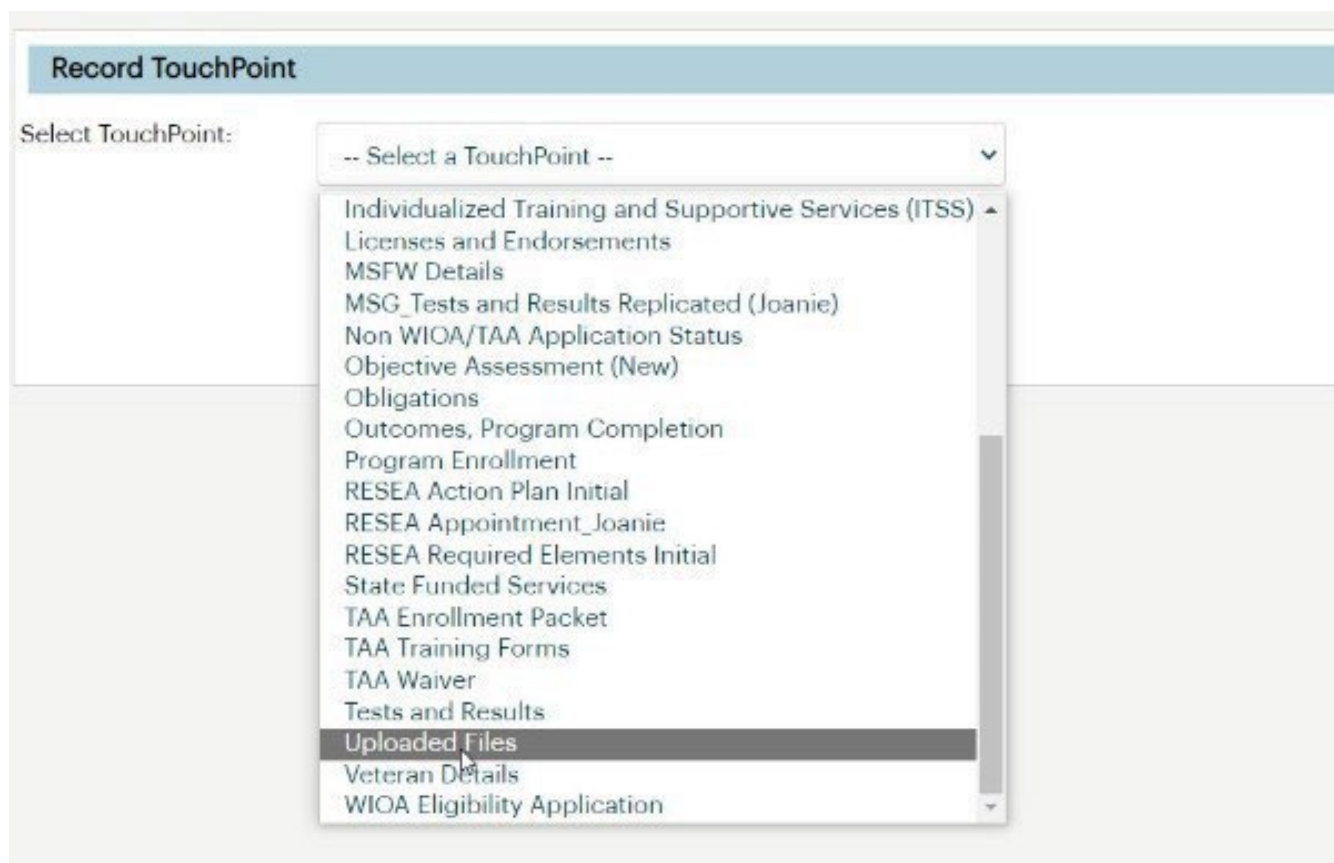
2. Enter the file name of the document to upload in the "**Document Name**" field and click the "**Select**" button.

3. From there, you will be prompted to select the file to upload. After you select it, it will appear listed on the screen with a yellow dot; **it is very important that you wait until the dot turns green, or else the file will be incapable of being viewed.** For example, see picture below.

Document Name

GSamsa_UWCalc_760514_06142022

29/250

File Type

File

● GSamsa_UWCalc_760514_06142022.pdf   ✕ Remove

[   ]   Select

Date of Deletion

mm/dd/yyyy   📅

Cancel

4. Click Save at the bottom of the screen.

F. ETO Reports

General Tips:

- The system pulls automated reports on Monday. Because of this, waiting until later in the week can save time and effort.
- The first time an attempt to pull a report is made, the pop-up blockers may need to be turned off.
- ETO reports will eventually time out if the data selected takes too long to collect; if it extends past that time period, it will provide whatever information it has.
  - The system will provide whatever information it has pulled as of the timeout. Please note that this may not be all data that is available from the period requested. For this reason, multiple report pulls for especially long date ranges are therefore recommended.

Suggested Reports:

To assist with tracking case management and service provision, the following ETO reports are recommended:
- Program Enrollments Report Without Demo Details
- Outcomes Touchpoints With Employment Start Date Information
- Case Management Report without Demographic Details
- Local Reporter Data Optimized
- Create a Record in ETO

Getting Started

- The reports menu is in the user control panel on the left side of the page.
- Select the three bars, then choose "Reports" from the dropdown menu.
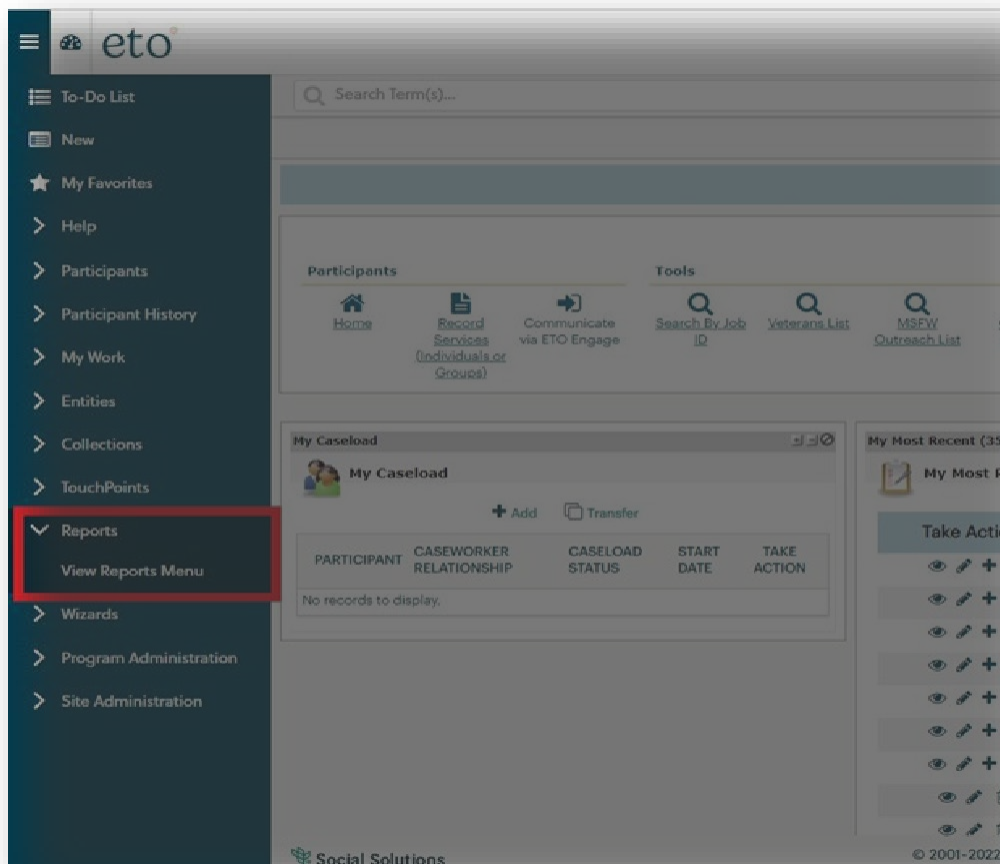
- Always start by refreshing the Reports List.

Select Report:

The reports previously mentioned are in different sub-categories:

- Local Reporter Data
  - Local Reporter Services Report OPTIMIZED
  - Program Enrollment Outcomes

- Operational Reports
  - Outcomes Touchpoints With Employment Start Date Information
  - Program Enrollment Report With Demographic Details
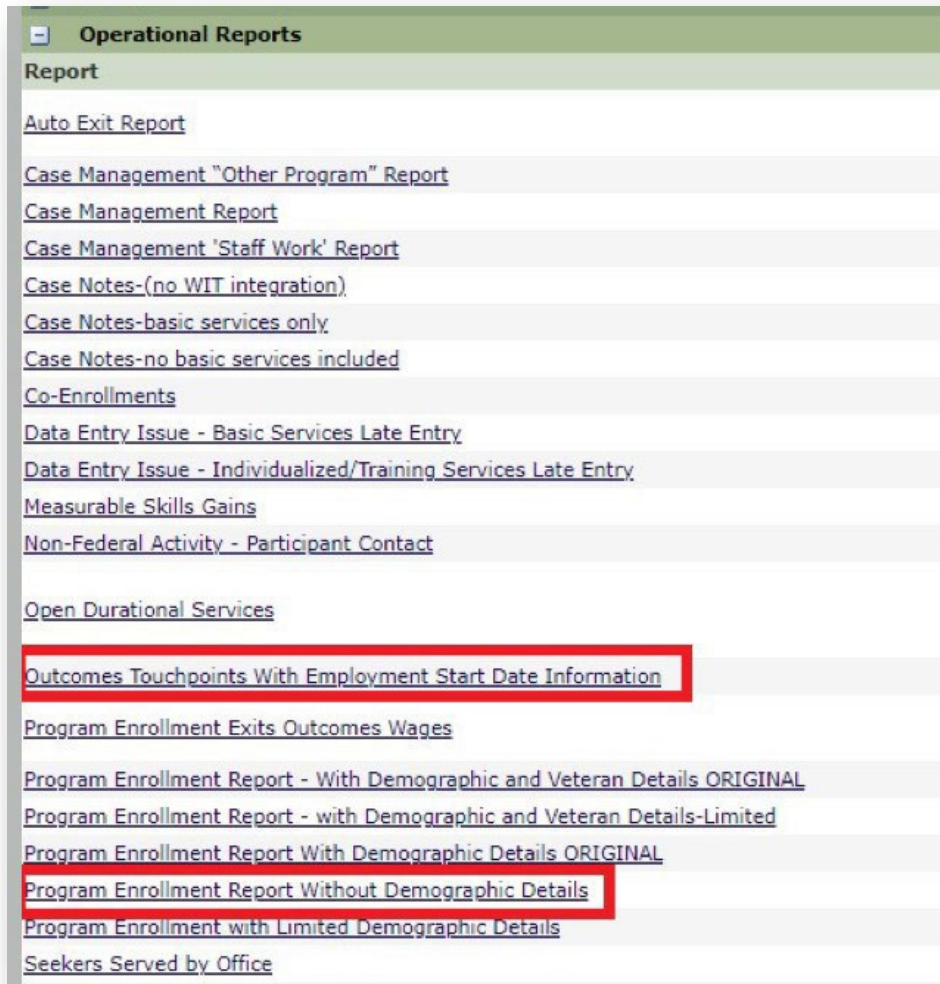
- Administrative Report
  - Staff Created Participants

- Selecting Data:
  - Select dates and areas from which to collect information.
  - Remember, the more that is selected for time and area, the longer the report takes to populate.

Navigating the Report

- The Filter Bar can be used to sort data before export.
  - You may not have this by default; to bring it up, click "Filter Bar" on the toolbar at the top.
  - Select the information you wish to see by clicking on the options on the bar below.
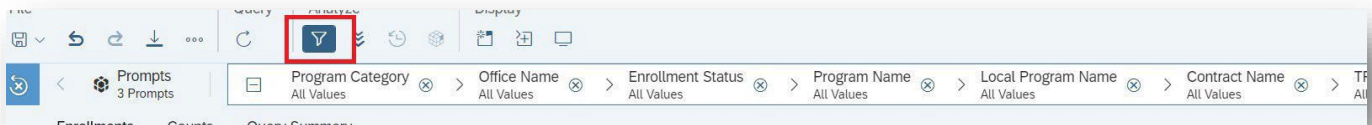
Exporting to Excel

- Select the export button from the taskbar, shown below.
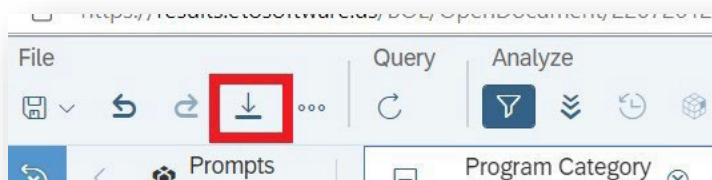
- Choose the preferred format.
- The file will be automatically saved in your downloads folder if you're using Edge.
- If you're using Chrome, it will not automatically save, and you will need to save it before closing. Note: Chrome can sometimes cause issues with ETO, so if you have difficulty while using it, try using Edge.

Attachment B - State EcSA Program Service Catalog

Type	Service Name	Description of Service	Durational Service
BASIC	State EcSA Basic Assessment	Assessment of a customer's skills, education, or career objectives in order to achieve any of the following: assist the customer in deciding on appropriate next steps, search for employment, training, and related services, including job referral; assist customer in assessing his/her personal barriers to employment; assist customer in accessing other related services necessary to enhance his/her employability and individual employment related needs.	No
BASIC	State EcSA Career Guidance Services	Assist customers in planning career or vocational paths, preparing for the job market, and identifying or creating steps that lead to employment. Expected outcome is to help customers identify, define and verbalize their career goals, overcome obstacles, and articulate skills and accomplishments.	No
BASIC	State EcSA Deskside Job Seeker Assistance	A two-way communication between staff and customer, via in-person, phone, email, WebEx, or other electronic methods. This service is tailored to the customer's individual needs regarding one or more of the following: matching one's skills and abilities to the job market; job search techniques; resumes, job applications and other job search related materials, and interviewing techniques.	No
BASIC	State EcSA Employment Referral	A referral to any employment opportunity not listed in WorkSourceWA.com.	No
BASIC	State EcSA Job Development	The process of securing a job interview with a private or public employer for a specific customer for whom there is no suitable job opening available. This service is taken at the successful obtainment of an interview or for the act of seeking a job interview for the customer.	No
BASIC	State EcSA Miscellaneous Workshop	A group service that is not a WorkSource Module or Job Club; that provides additional employment or training information or instruction.	No
BASIC	State EcSA Provided Workforce Information	Providing readily available information that does not require an assessment of the job seeker's skills or abilities. This may include any of the following: explanation of the types of services available through the WorkSource system and how to access them; provide/discuss labor market information; training/retraining information, including vocational exploration, length of training, costs, funding resources and prerequisites needed for the training; general information regarding Unemployment Insurance to potential and current UI claimants (including phone, fax, submission of information to the Claim Center); information on eligible training providers and their outcomes; and information on local area performance accountability measures and outcomes.	No
BASIC	State EcSA Referral to Additional Services	Referral to services available from other WorkSource partners or community services, beyond Basic Career Services. This referral identifies that the seeker has additional barriers to employment that Basic Career Services cannot address that perhaps Individualized Career Services, Training services or Supportive services help overcome. Information and referrals may also be provided for childcare, child support, transportation, housing, medical insurance, TANF, SNAP, EITC, etc.	No
BASIC	State EcSA Resume Review	Desk-side review of an existing resume created by the customer though attendance of the group resume workshop or through the customer's own means. This review can include assistance with targeting a resume, providing spelling, grammar changes and layout suggestions. Desk-side review should not be used to create a resume for the customer.	No

Type	Service Name	Description of Service	Durational Service
INDIVIDUALIZED	State EcSA Career and Vocational Counseling	Counseling assistance for customers in planning career or vocational paths, preparing for the job market, and identifying or creating steps that lead to employment. Expected outcome is to help customers identify, define and verbalize their career goals, overcome obstacles through WorkSource or other partner's services, and articulate ones skills and accomplishments. This counseling service can be delivered one-on-one or in a group setting.	No
INDIVIDUALIZED	State EcSA Comprehensive and Specialized Assessment	Comprehensive and specialized assessments of the skill levels and service needs, which may include: 1. Diagnostic Testing and use of other assessment tools; and 2. In-depth interviewing and evaluation to identify barriers and appropriate goals.	No
INDIVIDUALIZED	State EcSA Development of Individual Employment Plans	Joint development of an individual employment plan between the customer and career counselor to identify employment goals, income calculation levels, appropriate achievement objectives, and appropriate combination of services for the customer to achieve the employment goals, including eligible providers of training services and career pathways to attain career objectives.	No
INDIVIDUALIZED	State EcSA Mentorship Opportunity	A single point in time event or workshop intended to provide guidance, support, and encouragement to customers and build community and peer support. May include opportunities to support workforce preparedness, increase awareness of or exposure to additional resources or employment opportunities. Can be provided in groups or on an individual basis. Examples include informational and life skills workshops, networking events, job shadows, informational interviews, or employer led workshops.	No
INDIVIDUALIZED	State EcSA One-to-One Mentoring	One-to-one mentorship or coaching of at least 10 hours per year. Can be provided by an employer, coworker, community member, or career counselor staff. Mentorship is intended to provide guidance, support, and encouragement to ensure the customer experiences inclusion and feels strong support from their community. May include opportunities to support workplace preparedness and increase awareness of or exposure to additional resources or employment opportunities. Documentation must be maintained to demonstrate that the customer has met the 10 hour requirement.	Yes
INDIVIDUALIZED	State EcSA Financial Literacy	Supporting the ability of adults and dislocated workers to create household budgets; initiate savings plans; make informed financial decisions about education, retirement, homeownership, wealth building, or other savings goals; effectively manage spending, credit and debit; understand, evaluate, and compare financial products, services, and opportunities; and increase awareness of the availability of credit reports and scores in obtaining credit and their effect on credit terms.	No
INDIVIDUALIZED	State EcSA Short-Term Pre-Vocational Services	Development of learning skills, communication skills, interviewing skills, punctuality, personal maintenance skills, and professional conduct to prepare individuals for unsubsidized employment or training. May include pre-apprenticeship programs.	Yes
INDIVIDUALIZED	State EcSA Transitional Job	A transitional job is a training service that is a subsidized, time-limited work experience with a public, private, or nonprofit employer for individuals with barriers to employment who are chronically unemployed or have an inconsistent work history to establish a work history that will lead to retention in unsubsidized employment. This service must be provided in combination with career services and/or support services. If it is not, it must be recorded as a work experience and/or internship.	Yes
INDIVIDUALIZED	State EcSA Work/Internship Experience	For adults and dislocated workers, work experience is a planned, structured learning experience that takes place in a workplace for a limited period of time and is linked to a career. Work experience may be paid or unpaid, as appropriate. A work experience workplace may be in the private for-profit sector, the non-profit sector, or the public sector. Labor standards apply in any work experience where an employee/employer relationship, as defined by the Fair Labor Standards Act, exists.	Yes

Type	Service Name	Description of Service	Durational Service
INDIVIDUALIZED	State EcSA Workforce Preparation	Activities that help an individual acquire a combination of basic academic skills, critical thinking skills, digital literacy skills, and self-management skills, including competencies in utilizing resources and information, working with others, understanding systems, and obtaining skills necessary for successful preparation, transition into, and completion of postsecondary education, training, or employment.	Yes
SUPPORT	State EcSA Program Support Services (Other)	This service is used when the support services being provided do not fall into the transportation category. This may include assistance with clothing, counseling, family/health care, housing/rental assistance, tools, union dues, drivers' licenses, car repairs, assistance with books, fees, and school supplies, payments for employment and training-related applications, tests, certifications, and locally approved resources. The purpose of support services is to offer a resource for customers who are actively engaged in job search, work activities or training. Support services should be provided based on the real and immediate needs of the customer.	No
SUPPORT	State EcSA Program Support Services (Transportation)	Support services to be provided to customers prior to job placement and exiting the program. Transportation support are goods in the form of transportation assistance. The purpose of support services is to offer a resource for customers who are actively engaged in job search, work activities or training. Support services should be provided based on the real and immediate needs of the customer.	No
SUPPORT	State EcSA Financial Support Payments	Monetary assistance provided by the State EcSA program including income support, incentive payments, stipend payments, and cash support.	No
TRAINING	State EcSA Occupational Skills Training	An organized program of study for adults and dislocated workers that provides specific vocational skills that lead to proficiency in performing actual tasks and technical functions required by certain occupational fields at entry, intermediate, or advanced levels.	Yes
TRAINING	State EcSA On-the-Job Training	Training provided by an employer to a paid customer of the EcSA program who is engaged in productive work in a job that improves knowledge or skills essential to the full and adequate performance of the job; provides reimbursement to the employer of up to 75% of the wage rate of the customer, for the extraordinary costs of providing the training and additional supervision related to the training; limited in duration as is appropriate to the occupation for which the customer is being trained, taking into account the content of the training, the customer's prior work experience, and the customer's service strategy, as appropriate.	Yes
TRAINING	State EcSA Training Paid By Other	Represents training services, including OJT, that is paid for by another funding source.	Yes
TRAINING	State EcSA Apprenticeship Training	Training that is provided through a Registered Apprenticeship training system that combines paid learning on-the-job and related technical and theoretical instruction in a skilled occupation.	Yes
TRAINING	State EcSA Customized Training	Training customized to meet employer needs with a commitment by an employer or group of employers to employ the individual upon successful completion of the training and for which the employer pays a significant portion of the cost of training as determined by local policy.	Yes
TRAINING	State EcSA Incumbent Worker Training	Incumbent worker training is intended to assist employed workers (employed a minimum of six months with the employer) to retain employment by averting layoffs or to obtain the increased skills necessary for promotion within the company and to create a backfill opportunity for the employer.	Yes

Attachment C

Self-Sufficiency Calculator
Step-by-Step Guide to Saving Customer Information

The following is a step-by-step guide to saving customer information in the UW Self-Sufficiency Calculator.

1. Visit www.thecalculator.org to access the UW Self-Sufficiency Calculator.

2. Case Manager Login

a. Scroll down to bottom of the main page of the Self-Sufficiency Calculator and click on the **"Case Manager Login"** on the bottom right of the main page.
b. On the case manager page, enter your Case Manager ID & Case Manager Password and click on the **"Login"** button.
c. After logging in, you can register a new customer, search for or list customers, edit registration data, or enter exit data.

Authorized WorkForce Central or State EcSA service provider staff will issue the Case Manager ID and Password.

REGISTERING A NEW ECSA CUSTOMER

1. Registering a new EcSA customer

a. Click on **"Register New Client."** This refers to the date that a self-sufficiency calculator record is created for the customer and allows "pre" and "post" wage data to be captured.
b. Selecting this option will take you to the **Personal Info page.**

2. Complete Information on the Personal Information Page

a. Answer each of the questions on the Personal Info page for the new EcSA customer.
b. Required fields have a red asterisk and each field must be completed to proceed to the calculator.

3. Proceed to the Calculator

a. After the Personal Info Page is completed, click the **"Continue to Calculator"** button at the bottom of the screen.

4. Enter Customer Data-Wages/Income and Expenses

a. Enter the customer's data on the **Wages/ Income and Expenses** pages.
b. Navigation through the pages is easy using the tabs at the top of the page or the "Next" button at the bottom of each page.

5. Review Customer Data

a. Go to the **Review** page to double-check the information that has been entered.
b. Click on any of the blue "edit" buttons to make necessary changes.
c. After the information is reviewed and confirmed accurate, click on the **"Move to Final Report"** button.

6. Save Information, Final Report Page

   a. From the drop-down menu at the bottom of the Final Report page, select "**Print this page,**" click on the **"GO"** button and print the report for your file.
   b. Then select **"Save registration data & exit calculator"** and click on the **"GO"** button.

EDITING CUSTOMER REGISTRATION DATA

Registration data should reflect customer information at the time of registration; only make edits if the information initially entered was incorrect at the time.

1. Locate Customer Record

   a. After logging in as a case manager, use the client search field to locate the customer's record (customer records can be searched by first name, client ID, or ETO ID).

2. Edit Record

   a. After the record is located, click on **"edit record"** and use the tabs to get to the appropriate page(s) to edit registration data.

3. Save Information, Final Report Page

   a. After the necessary changes to customer registration data is complete, go to the **Final Report** page.
   b. From the drop-down menu at the bottom of the page, select **"Print this page,"** click on the **"GO"** button, and print the report for your file.
   c. Then select **"Save registration data & exit calculator"** and click on the **"GO"** button.

Exiting an EcSA Registered Customer

1. Exit a Customer

The "exit" function is intended to capture wage data when the customer secures employment as a result of participating in the EcSA program.

   a. After logging in as a case manager, use the client search field to locate the customer's record (customer records can be searched by first name, client ID, or ETO ID).

2. Enter Customer Data-Wages/Income and Expenses

   a. Upon arriving at the **Personal Info page**, complete each of the pages entering income and expense information as you did at registration.
   b. Note: the data you entered at registration will appear on these pages at exit. Edit as needed and leave data that is still current at exit.)

3. Review Customer Data

   a. Go to the **Review** page to double-check the information that has been entered.
   b. Click on any of the blue "edit" buttons to make necessary changes.
   c. After completing the review of information, click on the **"Move to Final Report"** button.

4: Save Information, Final Report Page

a. From the drop-down menu at the bottom of the Final Report page, select **"Print this page"** and click on the **"GO"** button and print the report.
b. Then select **"Save exit data & exit calculator"** and click on the **"GO"** button.

See [Uploading Documentation from the UW Self-Sufficiency Calculator](#) for WorkForce Central's instructions for uploading documentation from the UW Self-Sufficiency Calculator into ETO.