



POLICY

SECTION: CSTB	POLICY# 020-C0102	PAGE: 1 of 4
TITLE: Needs-Related Payments		EFFECTIVE DATE: 2.18.2021
REPLACES: N/A		DATED:

DISTRIBUTION: CAREERSOURCE TAMPA BAY STAFF

PURPOSE: To ensure the appropriate use of needs-related payments as an allowable service for WIOA eligible Adult, Dislocated Worker and Out-of-School Youth.

BACKGROUND: The Workforce Innovation and Opportunity Act (WIOA) Sections 134(d)((3) authorized needs related payments for adults, dislocated workers, and out-of-school youth (18-24) provides program guidelines for supportive services for defined in WIOA to enable individuals to participate in WIOA authorized activities.

POLICY:

Needs-related payments are a supportive service that provides financial assistance to participants to enable their participation in training. Unlike other supportive services, Local Workforce Development Boards (LWDBs) may only provide needs-related payments to eligible WIOA participants who are enrolled in training or accepted in a training program that will begin within 30 calendar days.

Needs-related payments provide financial assistance to participants for the purpose of enabling them to participate in training and are a supportive service authorized by WIOA sec. 134(d)(3). Unlike other supportive services, in order to qualify for needs-related payments, a participant must be enrolled in training.

Needs related must be administered in a manner that is fair and equitable to all participants within the established parameters set forth by federal and state statutes, regulations, grant agreements, policies and procedures.

Eligibility for Adults, Dislocated Workers and Out-of-School Youth (OSY):

To receive needs-related payments, adults and OSY (ages 18-24) must:

- a) Be unemployed;
- b) Not qualify for, or have ceased qualifying for, Reemployment Assistance (RA) benefits; and
- c) Be enrolled in training services authorized under WIOA sec. 134(c)(3).

To receive needs-related payments, dislocated workers must be unemployed, and:

- a) Have ceased to qualify for RA benefits or Trade Readjustment Allowance (TRA) under the Trade Adjustment Act (TAA) program; and
- b) Be enrolled in training services authorized under WIOA sec. 134(c)(3) by the end of the 13th week after the most recent layoff that resulted in a determination of the worker's eligibility as a dislocated worker, or, if later, by the end of the 8th week after the worker is informed that a short-term layoff will exceed 6 months; or
- c) Be unemployed, deemed ineligible for RA benefits or TRA under the TAA program, and be enrolled in training services authorized under WIOA sec 134(c)(3).

Once these eligibility requirements are met, individuals may be awarded CSTB funded needs-related payments prior to the start date of training classes for the purpose of enabling them to participate in program of employment and training services that begin within 30 calendar days. At that point or sooner, as appropriate, all participants must be enrolled in WIOA funded training services.

Needs-related payments may be paid while a participant is waiting to start training classes under the condition if the participant has been accepted in a training program will begin within 30 calendar days.

Payment Levels:

Needs-related payments may be provided when it is determined that ongoing resources and income from all other sources are insufficient to support participants in WIOA funded training. Participants will be required to complete a financial analysis/ budget worksheet reflecting their current financial situation.

- a) CSTB has the authority to establish payment levels of needs-related payments for Adults & Out-of-School Youth.
- b) For Dislocated Workers, the payment level of needs-related payments must not exceed the greater of:
 - i. The applicable weekly level of RA benefits for participants who were eligible for RA benefits; or
 - ii. The poverty level for an equivalent period, for participants who did not qualify for unemployment compensation because of the qualifying layoff. The weekly payment level must be adjusted to reflect changes in total family income, as determined by CSTB.
 - iii. CSTB will adhere to the following needs- related payments for all funding streams: will be limited to \$6.50 per hour in training, not to exceed 30 hour per week.

NOTE: For any statewide projects, the payment level must be established by the State Workforce Development Board.

Documentation:

CSTB program staff are required to maintain documentation sufficient to ensure that funds are allowable and used for the intended purpose. At a minimum, documentation must include:

1. Determination of the participant's need for needs-related payments be documented through the Statement of Need and Eligibility: Needs-Related Payments form which is utilized to determine participants need and payment level. Provision of this service is documented on

- the participant's Career Plan.
2. Financial analysis/Budget worksheet will be done with each program participant to document that income from all other sources are insufficient to support participants in WIOA funded training.
 3. Documentation to support the WIOA funded training activity will be provided by the program participant and included in the participants WIOA EDMS file. Case notes documenting that the participant qualifies for and is in need of WIOA funded needs-related payments. Case notes would include WIOA funded training activity and needs-related payment levels.
 4. Records of need-related payments will be maintained in CSTB financial accounting system: Microix and MIP and can be pulled for audit purposes at any time.

Employ Florida Service Codes:

CSTB staff and service provider staff are required to enter the appropriate service codes in Employ Florida when participants are provided needs-related payments. Outlined below are the specific Employ Florida Service Codes, definitions and documentation required based on funding.

Service code	Definition	Documentation Required
326 Supportive Service - Needs Related Payments – Adults/ Dislocated Workers	Code is recorded to indicate that needs-related payments provide financial assistance to participants for the purpose of enabling them to participate in training. In order to qualify for needs-related payments a participant must be enrolled in training.	A case note is required and must include the specific details related to the supportive service/needs related payment provided to the participant. 20 CFR 680.930
488 Supportive Service - Needs Related Payments - Youth	Staff-generated – Code is recorded to identify support services that are reasonable and necessary to enable a jobseeker to participate in WIOA activities.	A case note is required and must include the type of needs related payment, any source used other than WIOA and the amount of the payment. 20 CFR 681.570

Continued Eligibility Assessment

Program participants ongoing eligibility for needs-related payments must be to be evaluated every 30 days from the initial eligibility determination period. CSTB staff and service providers must ensure the following:

- Participant continues to meet eligibility outlined in section above Eligibility for Adults, Dislocated Workers and Out-of-School Youth (OSY)
- Updated Statement of Need & Eligibility: Needs-Related Payment Form
- Case notes completed, documenting continued eligibility and remaining

Monitoring

Programmatic monitoring will be conducted throughout the program year by our internal Program

Monitors under the direction of our Director of MIS & Data Services. This will include a formal review of needs-related payment issuance, activities and case noting for all programmatic funding to comply with federal, state and local policies and procedures.

Policy Exceptions:

Any exceptions to the above stated policy or any part thereof, must be documented and approved by the CareerSource Tampa Bay CEO or his/her designee for consideration.

CSTB may receive federal, state and local grant awards that may not be subject to the requirements outlined above. Those awards will be governed by the rules and guidelines set forth as defined in the grant document(s). Desk guide(s) or other internal documents will be established to outline the processes specific to the award(s).

REFERENCES:

- Workforce Innovation and Opportunity Act, Public Law (WIOA) Sections 3(59); 106(c)(1)(F); 133(b)(2)(B);133(b)(3);134(c)(3);134(d)(3); 134(d)(4); 134(c)(1)(A)(ii);134(c)(1)(A)(iii): <https://www.govinfo.gov/content/pkg/PLAW-113publ128/pdf/PLAW-113publ128.pdf>
- CareerSource Florida Administrative Policy #109, Supportive Services and Needs-Related Payments: https://floridajobs.org/docs/default-source/lwdb-resources/policy-and-guidance/guidance-papers/2020-guidance-papers/adminpolicy109_wioa-suppsvcsneeds-relatedpymts.pdf?sfvrsn=bb5b4ab0_2
- 20 Code of Federal Regulations (CFR) Subpart G; 681.570; 681.640: <https://ecfr.federalregister.gov/current/title-20/chapter-V/part-680/subpart-G>
- 20 Code of Federal Regulations (CFR) 681.570: https://www.govregs.com/regulations/expand/title20_chapterV-i1_part681_subpartC_section681.570
- 20 Code of Federal Regulations (CFR) 680.930: https://www.ecfr.gov/cgi-bin/text-idx?SID=99d77fe0ed9d33b63d4d8f4b2f90c794&mc=true&node=se20.4.680_1900&rgn=div8
- Training and Employment Guidance Letter (TEGL) 19-16: https://wdr.doleta.gov/directives/attach/TEGL/TEGL_19-16_acc.pdf
- TEGL 21-16: https://wdr.doleta.gov/directives/attach/TEGL/TEGL_21-16_Acc.pdf

INQUIRIES: Any questions about this procedure should be directed to the CEO, Chief Policy & Performance Officer, Programs Director or their designee.