
ADULT PROGRAM PRIORITY OF SERVICE

GENERAL INSTRUCTIONS

The attached Directive is being issued in draft to give the Workforce Development Community the opportunity to review and comment prior to final issuance.

Submit any comments by email no later than **August 24, 2021**.

All comments received within the comment period will be considered before issuing the final Directive. Commenters will not be responded to individually. Rather, a summary of comments will be released with the final Directive.

Comments received after the specified due date will not be considered.

Email Scott.Osborne@edd.ca.gov
Include "Draft Directive Comments" in the email subject line.

If you have any questions, contact Scott Osborne at Scott.Osborne@edd.ca.gov.

ADULT PROGRAM PRIORITY OF SERVICE

EXECUTIVE SUMMARY

This policy provides guidance and establishes procedures regarding priority of service for recipients of public assistance, other low-income individuals, and individuals who are basic skills deficient served with *Workforce Innovation and Opportunity Act* (WIOA) Title I Adult program funds. This policy applies to all Local Workforce Development Areas (Local Area), and is effective immediately.

This policy contains some state-imposed requirements. All state-imposed requirements are indicated by ***bold, italic*** type.

This policy supersedes Workforce Services Directive *WIOA Adult Program Priority of Service* (WSD15-14), dated January 22, 2016. Retain this Directive until further notice.

REFERENCES

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- WIOA (Public Law 113-128) Sections 3 and 134
 - Title 20 *Code of Federal Regulations* (CFR) WIOA Final Rule, Sections 680.150, 680.600, 680.650
 - Training and Employment Guidance Letter (TEGL) [7-20 \(PDF\)](#), *Effective Implementation of Priority of Service Provisions for Most in Need Individuals in the Workforce Innovation and Opportunity Act (WIOA) Adult Program* (November 24, 2020)
 - TEGL [19-16 \(PDF\)](#), *Guidance on Services Provided Through the Adult and Dislocated Worker Programs Under the WIOA and the Wagner-Peyser Act Employment Services (ES), as Amended by Title III, Under the WIOA Final Rule* (March 1, 2017)
 - [Workforce Services Directive](#) WSD19-09, *Strategic Co-Enrollment – Unified Plan Partners* (February 12, 2020)
 - WSD19-04, *Priority of Service for Veterans and Eligible Spouses*, (September 11, 2019)

The EDD is an equal opportunity employer/program. Auxiliary aids and services are available upon request to individuals with disabilities.

BACKGROUND

The WIOA requires priority of service for adult employment and training activities for recipients of public assistance, other low-income individuals, and individuals who are basic skills deficient, which includes English Language Learners, for individualized and training services. Veterans and eligible spouses continue to receive priority of service for all US Department of Labor (DOL) funded programs amongst all participants.

In Program Year (PY) 2020, the DOL released TEGL 7-20 to share the vision of the WIOA Adult Program priority of service requirements. The DOL envisions that at least 75 percent of the state's participants receiving individualized career and training services in the WIOA Adult Program are from at least one of the priority groups, and expects this rate to be no lower than 50.1 percent.

Beginning in PY 2021, the Employment Development Department (EDD), in alignment with TEGL 7-20, will begin a two-year implementation of a minimum 75 percent WIOA Adult priority of service rate of individuals in an individualized career or training service for each Local Area. For PY 2021-22, Local Areas will be required to meet a minimum 50.1 percent priority of service rate of individuals in an individualized career or training service. For PY 2022-23 and thereafter, Local Areas will be required to meet a minimum 75 percent priority of service rate of individuals in an individualized career or training service.

POLICY AND PROCEDURES

Definitions

For purposes of this directive, the following definitions apply:

Basic Skills Deficient – An individual that is unable to compute or solve problems, or read, write, or speak English, at a level necessary to function on the job, in the individual's family, or in society (WIOA Section 3[5]). ***Criteria used to determine whether an individual is basic skills deficient includes the following:***

- ***Lacks a high school diploma or high school equivalency and is not enrolled in post-secondary education.***
- ***Enrolled in a Title II Adult Education/Literacy program.***
- ***English, reading, writing, or computing skills at an 8.9 or below grade level.***
- ***Determined to be Limited English Skills proficient through staff-documented observations.***
- ***Other objective criteria determined to be appropriate by the Local Area and documented in its required policy.***

Case Notes – Paper or electronic statements by the case manager that identifies, at a minimum, (1) a participant's status for a specific data element, (2) the date on which the information was obtained, and (3) the case manager who obtained the information. If case notes are used as a documentation source, the case notes must provide an auditable trail back to the source of information verified. The case manager does not need to keep a hard copy of the information verified in the participant's case file.

Example: A case manager verifies an individual is basic skills deficient by viewing school records, specifically, enrollment in a Title II Adult Education/Literacy program. The case notes must include auditable information, such as the name of the school and the date of enrollment, which could allow an auditor/monitor to later retrieve this information. The case manager would not need to keep a hard copy of the school record in the participant's file (TEGL 06-14, Attachment A).

Low-Income – An individual that meets one of the four criteria below:

1. Receives, or in the past six months has received, or is a member of a family that is receiving, or in the past six months has received, assistance through the Supplemental Nutrition Assistance Program (SNAP), Temporary Assistance For Needy Families (TANF), program supplemental security income program, or state or local income-based public assistance.
2. In a family with total family income that does not exceed the higher of the following:
 - a. The poverty line.
 - b. 70 percent of the Lower Living Standard Income Level.
3. A homeless individual.
4. An individual with a disability whose own income meets the income requirement, but who is a member of a family whose income does not meet the requirement.

(Reference WIOA Section 3[36])

Public Assistance Recipient – An individual that receives federal, state, or local government cash payments for which eligibility is determined by a needs or income test (WIOA Section 3[50]).

Self-Attestation – When a participant states his or her status for a particular data element, such as low income, and then signs and dates a form acknowledging this status. The key elements for self-attestation are (1) the participant identifying his or her status for permitted elements, and (2) signing and dating a form attesting to this self-identification. The form and signature can be on paper or in the Local Area management information system, with an electronic signature (TEGL 23-19, Attachment II).

*Note that self-attestation is not to be used as the primary method of gathering documentation to verify data elements. Self-attestation as a documentation source is only to be used when the preferred options of paper documentation or third party corroboration are not available.

Priority of Service Requirement

As stated in the WIOA Section 134(c)(3)(E), with respect to individualized career services and training services funded with WIOA Adult funds, priority of service must be given to recipients of public assistance, other low-income individuals, or individuals who are basic skills deficient (including English Language Learners). America's Job Center of CaliforniaSM (AJCC) staff must prioritize services to these populations at all times, regardless of the amount of funds available to provide services in the Local Area.

Priority of service status is established at the time of eligibility determination and does not change during the period of participation. The priority of service requirement does not apply to the WIOA Dislocated Worker program. ***Beginning PY 2021-22, Local Areas will be required to meet a minimum 50.1 percent priority of service rate of individuals in an individualized career or training service. For PY 2022-23 and thereafter, Local Areas will be required to meet a minimum 75 percent priority of service rate of individuals in an individualized career or training service.***

Veterans and eligible spouses continue to receive priority of service among all eligible individuals; however, they must meet the WIOA Adult program eligibility criteria and meet the criteria under WIOA Section 134(c)(3)(E). As described in TEGL 19-16, when programs are statutorily required to provide priority, such as the WIOA Adult program, then priority must be provided in the following order:

1. Veterans and eligible spouses who are also recipients of public assistance, other low income individuals, or individuals who are basic skills deficient.
2. Individuals who are the recipient of public assistance, other low income individuals, or individuals who are basic skills deficient.
3. Veterans and eligible spouses who are not included in WIOA's priority groups.
4. Priority populations established by the Governor and/or Local Workforce Development Board (Local Board).
5. Other individuals not included in WIOA's priority groups.

[Reference – [TEGL 19-16 \(PDF\)](#)]

For additional guidance on providing priority of service to veterans through the AJCC system, please reference [Workforce Services Directive WSD19-04](#).

Priority of Service Calculation

The Local Area priority of service rate is calculated based on the number of participants exited from the program who are identified as a priority population and received an individualized career or training service during their period of participation. This number is divided by the total number of participants exited from the program who have received an individualized career or training service.

Local Areas can view and analyze their priority of service rate by accessing the Data Integrity report in CalJOBS.

Career and Training Services

Under WIOA, career services category includes basic career services, individualized career services, and follow-up services. Basic career services are not subject to the priority of service requirement. However, individualized career services and training services are subject to the requirement (Title 20 CFR WIOA Final Rule Section 680.600).

Basic Career Services

Basic career services must be made available to all individuals seeking services offered by the one-stop delivery system, and include the following:

- Determinations of whether the individual is eligible to receive assistance from the Adult, Dislocated Worker, or Youth programs.
- Outreach, intake (including identification through the state's Worker Profiling and Reemployment Services system of unemployment insurance (UI) claimants likely to exhaust benefits), and orientation to information and other services available through the one-stop delivery system.
- Initial assessment of skill levels including literacy, numeracy, and English language proficiency, as well as aptitudes, abilities (including skills gaps), and supportive service needs.
- Labor exchange services, including the following:
 - Job search and placement assistance, and, when needed by an individual, career counseling, including the following:
 - Provision of information on in-demand industry sectors and occupations [as defined in WIOA Section 3(23)].
 - Provision of information on nontraditional employment [as defined in WIOA Section 3(37)].
- Provision of referrals to and coordination of activities with other programs and services, including those within the one-stop delivery system and, when appropriate, other workforce development programs.
- Provision of workforce and labor market employment statistics information, including the provision of accurate information relating to local, regional, and national labor market areas, including the following:
 - Job vacancy listings in labor market areas.
 - Information on job skills necessary to obtain the vacant jobs listed.
 - Information relating to local occupations in demand and the earnings, skill requirements, and opportunities for advancement for those jobs.
- Provision of performance information and program cost information on eligible providers of training services by program and type of providers.

- Provision of information about how the Local Area is performing on local performance accountability measures, as well as any additional performance information relating to the area's one-stop delivery system.
- Provision of information relating to the availability of supportive services or assistance, and appropriate referrals to those services and assistance, including (1) child care, (2) child support, (3) medical or child health assistance available through the state's Medicaid program and Children's Health Insurance Program, (4) benefits under the SNAP, (5) assistance through the earned income tax credit, (6) housing counseling and assistance services sponsored through the US Department of Housing and Urban Development, (7) and assistance under a state TANF program, and other supportive services and transportation provided through that program.
- Assistance in establishing eligibility for programs of financial aid assistance for training and education programs not provided under WIOA.
- Provision of information and assistance regarding filing claims under UI programs, including meaningful assistance to individuals seeking assistance in filing a claim:
 - Meaningful assistance means providing assistance as follows:
 - On-site using staff who are properly trained in UI claims, filing, and/or the acceptance of information necessary to file a claim (note that, staff providing UI assistance may be UI, Wagner-Peyser, or other AJCC partner staff members who have been properly trained to provide this type of assistance and service. Note that, questions, advice, or decisions that could affect a claimant's eligibility should only be handled by UI program staff).
 - By phone or via other technology, as long as the assistance is provided by trained and available staff and within a reasonable time.
 - The costs associated in providing meaningful assistance may be paid for by the state's UI program, the WIOA Adult or Dislocated Worker programs, the Wagner-Peyser employment service, or some combination of these funding sources.

Individualized Career Services

Individualized career services are subject to priority of service, and consist of the following:

- Comprehensive and specialized assessments of the skill levels and service needs of adults and dislocated workers, which may include the following:
 - Diagnostic testing and use of other assessment tools.
 - In-depth interviewing and evaluation to identify employment barriers and appropriate employment goals.
- Development of an individual employment plan, to identify the employment goals, appropriate achievement objectives, and appropriate combination of services for the participant to achieve his or her employment goals, including the list of, and information about, eligible training providers.
- Group and/or individual counseling and mentoring.
- Career planning (e.g. case management).

- Short-term pre-vocational services, including development of learning skills, communication skills, interviewing skills, punctuality, personal maintenance skills, and professional conduct to prepare individuals for unsubsidized employment or training, in some instances pre-apprenticeship programs may be considered as short-term pre-vocational services.
- Internships and work experiences that are linked to careers.
- 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, using information, working with others, understanding systems, and obtaining skills necessary for successful transition into and completion of postsecondary education, or training, or employment.
- Financial literacy services.
- Out-of-area job search assistance and relocation assistance.
- English language acquisition and integrated education and training programs.

Training Services

Training services are subject to priority of service, and consist of the following:

- Occupational skills training, including training for nontraditional employment.
- On-the-job training.
- Incumbent worker training.
- Programs that combine workplace training with related instruction, which may include cooperative education programs.
- Training programs operated by the private sector.
- Skill upgrading and retraining.
- Entrepreneurial training.
- Transitional jobs.
- Job readiness training provided in combination with another training service.
- Adult education and literacy activities, including activities of English language acquisition and integrated education and training programs, provided concurrently or in combination with another training service.
- Customized training conducted with a commitment by an employer or group of employers to employ an individual upon successful completion of the training.

For AJCC staff who enter participant data into CalJOBS, these program services are tracked in the CalJOBS system through the use of CalJOBS activity codes. For a detailed list of services and activity type, refer to WSD19-06 CalJOBS Activity Codes.

Documentation

Local Areas may use the following sources of documentation to verify whether an adult participant qualifies for priority of service under WIOA:

| PRIORITY OF SERVICE | |
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| Priority of Service Criteria | Acceptable Documentation (Only the documentation sources listed below may be used.) |
| 1. Recipient of Public Assistance | <ul style="list-style-type: none"> • Cross-match with public assistance database • Copy of authorization to receive cash public assistance • Copy of public assistance check • Medical card showing cash grant status • Public assistance records • Refugee assistance records |
| 2. Low Income | <ul style="list-style-type: none"> • Alimony agreement • Award letter from veteran's administration • Bank statements • Compensation award letter • Court award letter • Pension statement • Employer statement/contact • Family or business financial records • Housing authority verification • Pay stubs • Public assistance records • Quarterly estimated tax for self-employed persons • Social Security benefits • Unemployment Insurance documents • Self-attestation* |
| 3. Basic Skills Deficient | <ul style="list-style-type: none"> • School Records <ul style="list-style-type: none"> ○ A referral or records from a Title II Basic Adult Education program or English Language Learner program • Results of academic assessment • Case notes* • Self-Attestation* |
| <p>*Please reference the definition section of this directive for additional guidance on case notes or self-attestation being used for documentation purposes.</p> | |

For reporting and statistical purposes, the EDD recommends Local Areas document all barriers of employment in order to accurately measure populations served within the AJCC system. In addition, Local Areas should review and update policies and procedures, as necessary, including

the monitoring of these policies and procedures in AJCCs, in order to align with the priority of service rate requirement.

Corrective Action

Any Local Board that does not meet the minimum priority of service requirement will be required to submit a corrective action plan by email to their [EDD Regional Advisor](#) that provides reasons for not meeting the requirement and actions the Local Board will take to address the priority of service deficiencies. The corrective action plan will be due within 90 days of receiving EDD notification that the Local Board did not meet the priority of service requirement.

The Corrective Action Plan should address the following questions:

- How does your priority of service rate compare between the current and prior PY?
- What is the plan to meet the priority of service requirement for the subsequent year? What will the Local Area do differently than the prior PY?
- What strategies did you use in order to leverage co-enrollment resources including identifying existing partnerships that serve populations that fall under the priority of service requirement?
- What Local Area policies or strategies are in use to monitor and track your priority of service requirement?
What technical assistance does the Local Area need in order to meet the priority of service requirement for the current and subsequent program years?

ACTION

Please bring this directive to the attention of all relevant parties.

INQUIRIES

If you have any questions, contact your [Regional Advisor](#).

/s/ NICOLE LAKTASH, Acting Chief
Central Office Workforce Services Division