North Central
Workforce Development Area

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LOCAL DIRECTIVE

Directive #: 22-180 Rev 3	Date: January 8, 2026

TO: Staff and Service Providers

FROM: Lisa Romine, CEO

SUBJECT: Economic Security for All (Federal & State)

SUPERCEDES: Local Directive 22-180 Rev 2

Summary of changes in this update:

1. Revised definition of household for UW Self Sufficiency Calculator use in accordance with State program Policy 7000 Revision 3.
2. Updates references throughout.

GENERAL INSTRUCTIONS:

The Economic Security for All (EcSA) Initiative appropriated federal Title I-B 10% funds and state general funds to be allocated to Local Workforce Development Boards (LWDBs) to improve workforce outcomes and reduce poverty across Washington State.

Per WA State Program Policy 7000, Revision 3, Federal and State EcSA activities conform to existing policies governing WIOA Title I programs. Any exceptions to current policy are outlined in this guidance.

A. ELIGIBILITY

1. Federal and State EcSA applicants must meet basic eligibility requirements for any of the WIOA Title I formula programs (Adult, DW, or Youth). Additionally, applicants must fall into one of two categories:
   - **a. <u>Experiencing Poverty</u>** - Be from a household (as defined by Health and Human Services (HHS) poverty guidelines) that is below 200% of the Federal Poverty Level (FPL), or
   - **b. <u>Demonstrating Financial Need</u>** - Be below their self-sufficiency goal and require employment or training-related services to achieve self-sufficiency. Individuals

demonstrating financial need may be below or above 200% of the FPL as long as they are below their self-sufficiency goals.

2. State EcSA applicants additionally are excluded from requirements to register for Selective Service unless co-enrolled in WIOA Title I.

3. Eligibility for Federal or State EcSA programs does not supplant eligibility criteria for any other program. Each participant must meet the specific eligibility requirements for each program in which they are enrolled.

See Attachment A for ETO Enrollment and Service Information.

B. SELF SUFFICIENCY CALCULATOR

Upon enrollment into the Federal and State EcSA programs, participants will complete a personal self-sufficiency assessment using the approved University of Washington (UW) calculator with trainer assistance. For the purposes of all State EcSA programs, Self-Sufficiency is defined as Attainment of 100% of individualized household self-sufficiency, as established through use of the UW Self-Sufficiency Calculator. This initial assessment will be used to develop a customized career plan to reach 100% of household self-sufficiency. For the purposes of the Self- Sufficiency Calculator, "Household" is defined as "persons residing in the household who are related by blood, marriage or decree of court. Unmarried couples and their children are also considered part of the household."

Participants will complete a final self-sufficiency assessment using the UW calculator to determine participant's income. If a participant attains their self-sufficiency adequacy goal prior to activity completion or program exit, staff will direct the participant to complete a self-sufficiency assessment using the UW calculator. Staff will continue to provide appropriate services to ensure participants have the resources they need to stay at self-sufficiency.

See Attachment B for Self-Sufficiency Calculator Information.

C. BUNDLED SERVICES DESK AID

An Individual Employment Plan (IEP) must be established for every EcSA enrollee. If a client already has an Individual Employment Plan as a result of prior enrollment in a WIOA or Federal EcSA 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 EcSA program will be used to help the client reach self-sufficiency. If participants are enrolled in training and earning an incentive per Directive 22-179 Revision 3, the EcSA Monthly Plan & Progress Report must be attached to the IEP.

All Individuals enrolled in EcSA must be provided information about other workforce, education, and human services that may be of value to them by using the Bundled Services Desk Aid. Case managers will complete the section on page 2 of the Individual Employment Plan indicating that they reviewed the Bundled Services Desk Aid with the participant and note any referrals to other agencies or organizations in the space provided. In the case note for Development of Individual Employment Plan or State-Funded Development of Individual Employment Plan, case managers will include "reviewed Bundled Services Desk Aid with participant; see IEP for details" or similar wording.

D. INCENTIVE POLICY

Directive 22-179, Revision 3 sets forth procedures for award of incentive payments for participants enrolled in, and making satisfactory progress in, state-funded Economic Security for All (EcSA) activities and programs.

E. FINANCIAL NEEDS ANALYSIS (ITA)

Directive 18-171, Revision 4 outlines ITA candidates must meet the Workforce Innovation & Opportunity Act eligibility and local area priority requirements and show a financial need by completing a School Funding Worksheet. EcSA participants may demonstrate a need by completing the UW self-sufficiency calculator and adding school grants to the total income and school expenses to the monthly costs. Determine the monthly need while attending training by subtracting the total monthly income from total monthly expenses. Total Need is calculated by multiplying the monthly need by the number of months in training (See Attachment A – Self Sufficiency Calculator Worksheet). Case notes must outline the financial need with expenses greater than income as determined by the UW self-sufficiency calculator. Case notes and/or IEP must address and account for any financial aid/grants the applicant is receiving and school expenditures included in the calculator.

F. OTHER PROGRAM REQUIREMENTS

A separate file or a subsection within a file for a Federal or State EcSA participant co-enrolled WIOA program(s) must be kept with relevant EcSA grant information. Relevant information includes any documents specific to EcSA programs (i.e., incentive documentation).

Fund Utilization: Funds will be utilized in a fair and equitable manner by setting enrollment and training goals at an average cost per participant consistent with the EcSA Expansion Decision Package approved by the state legislature. Other funds, such as WIOA Adult, Dislocated Worker, and Youth will be used to supplement this low cost per trained in order to bring participants to self-sufficiency. No cost cap per individual has been set. As all enrollment and training goals are met, average cost per will also be met. The average cost per of $7200 is insufficient in all cases to bring individuals out of poverty. Other funds will supplement this work.

<u>**ATTACHMENT A: ETO PROCEDURES FOR STATE EcSA ENROLLMENT & SERVICES**</u>

<u>Enrolling a Client in the State EcSA Program</u>

First, ensure that the client has an account on worksourcewa.com.

- Several demographic fields can only be filled in by an account on worksourcewa.com, making a fully completed account vital.
- If a client is not in ETO, they do not have a fully completed account on worksourcewa.com.
- You can check a client's status by going to their dashboard and selecting "Access Seeker/Participant Account".

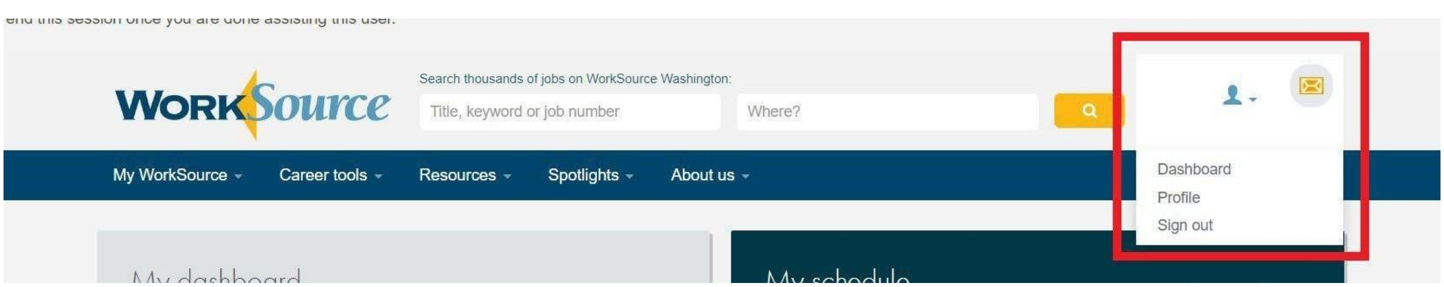
- If they do not have an account on worksourcewa.com, you will get the following message:

There was an error while accessing the participant's Job Match account.

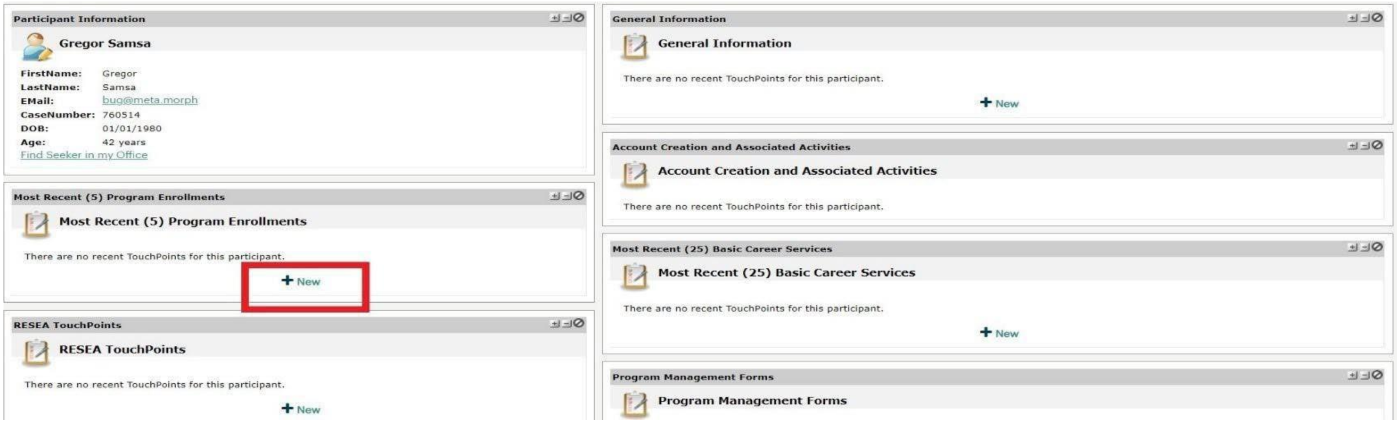
Details:

The participant you are trying to access has not registered in Job Match. Please have that person directly access My.WorkSourceWA.com to complete their registration.
Please close this window and return back to ETO.

- If they do have an account, ensure that their profile is filled out fully. You can reach the profile by clicking on the person in the upper right corner of the page and clicking "profile." Ensure that every field is filled. Some clients may have selected "no" on the question "would you like to be assessed for additional services;" if this is the case, change their answer to "yes" and fill in the answers, or else ETO will not have complete demographic information.



- Once you've ensured that their account is fully completed, you can begin the enrollment process. From the client dashboard, select "new" in the area titled "Most Recent Program Enrollments".

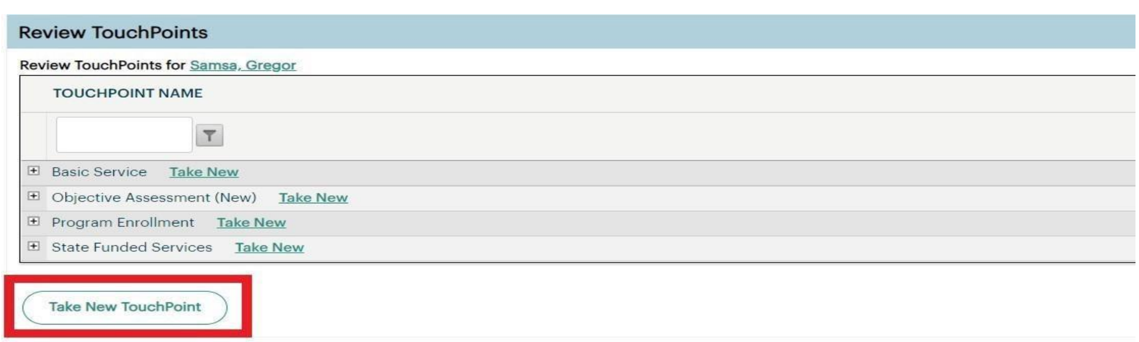


- Select “State-Funded Economic Security for All (EcSA)” from the dropdown and fill in all information requested including the question regarding whether the client is above 200% of the FPL, then save.
- After completing this process, create a State EcSA service linked with the program with the same date as the enrollment. This service is usually “State-Funded Development of Individual Employment Plan”.

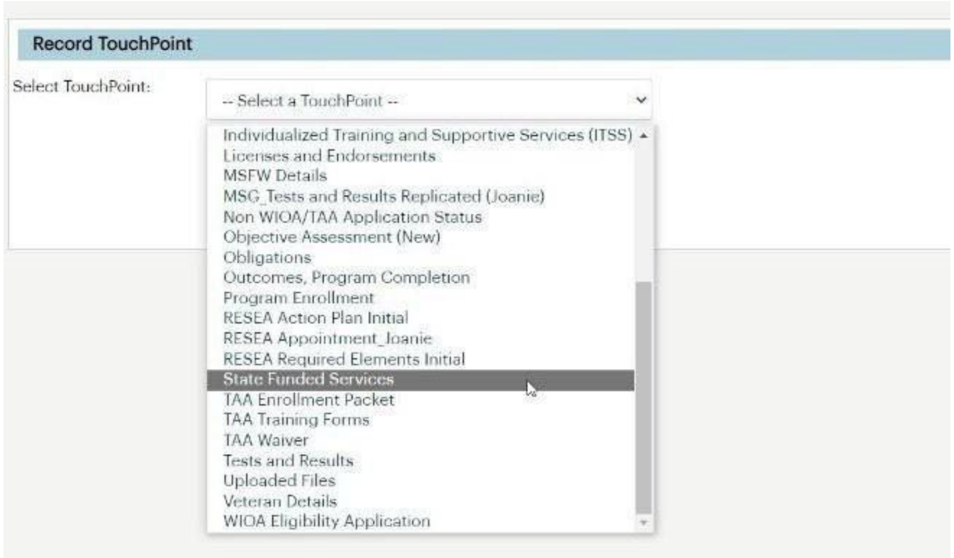
<u>Adding a Service</u>

- To take a new touchpoint in the State EcSA program, first go to the client’s ETO dashboard, and select “Review Seeker/Participant Touchpoints.”

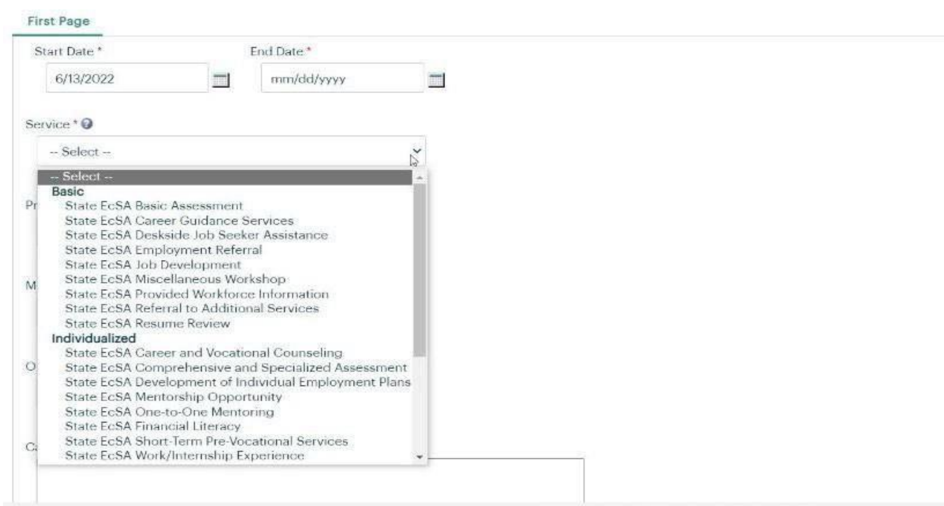
- From there, select “Take New Touchpoint,” at the bottom of the list of touchpoint names:



- From the dropdown list that this provides, select “State Funded Services”.
  - **NOTE**: **Do not** enter State EcSA services in “Individual Training and Supportive Services (ITSS)”.



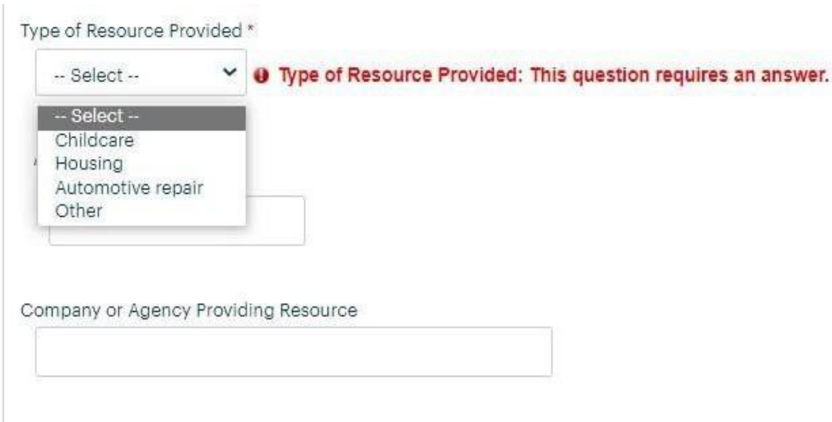
- Select the date the service was provided. Then, using the State-Funded services tab in the WorkSource Services Catalog, determine the proper service, and select it from the dropdown list. Then, fill out the touchpoint, making sure to fill all fields provided and add a case note.



<u>Tracking State EcSA Supportive Services</u>

To fulfill new state 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.

- To track childcare, housing, or automotive repair, select the option in question from the new dropdown field in the touchpoint.



- After selecting this option, enter the amount provided for the service. The touchpoint is otherwise unchanged.
- If the service does not fit into any of the options, select "Other" and you will be given the following options. Fill them out accordingly.

Note: Transportation support is tracked by the corresponding touchpoint, rather than a dropdown option.

<u>How to Track an EcSA Career Plan</u>

- In order to complete a State EcSA enrollment in the system, a service marking the completion of the career plan and UW Self-Sufficiency Calculator must be entered. In order to streamline processes and avoid errors, the service to be taken for State EcSA is "State Funded Development of Individual Employment Plan."
- The career plan must be complete, and service entered within 30 calendar days of the enrollment. It must also reference the completion of the Bundled Services Desk Aid, including any resources to which the client was referred.

- This service will also serve as the location where the State EcSA Career Plan is to be located.

- If the client already has a career plan as a result of a prior, ongoing program enrollment, the bulk of the plan may be located in other parts of ETO, but the Development of Individual Employment Plan must include any EcSA-specific elements of the enrollment, such as information concerning the UW Self-Sufficiency Calculator results, and how the results relate to the larger career plan.

<u>Program Completing a Participant</u>

  - Create new *Outcome, Program Completion* TouchPoint.
  - Select State-Funded Economic Security for All (EcSA) from active program enrollment dropdown menu.
  - Complete *Outcome, Program Completion* TouchPoint data elements as appropriate for the participant:
  - Identify whether they are "employed at outcome".
  - Enter annualized wages.

ATTACHMENT B: UW SELF SUFFICIENCY CALCULATOR

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.

STEP #1: FIND THE SELF-SUFFICIENCY CALCULATOR ON THE INTERNET Go to www.thecalculator.org.

STEP #2: LOG IN TO THE CALCULATOR AS A CASEWORKER

On the main page for the Self-Sufficiency Calculator, click on the button at the bottom left of the screen: "Case Manager Log In click here." On the case manager page, enter your ID & password and click on the "Login" button. Once you have logged in you can register a new customer, search for or list customers, edit registration data, or enter exit data.

*(Your manager will give you a Case Manager ID and Password. If you do not have those, please see your manager.)

Registering a new ECSA customer

STEP #3: REGISTER A NEW CUSTOMER

Click on "Register New Client." This refers to the date that you create a self-sufficiency calculator record for your customer, to allow you to capture "pre" and "post" wage data. Selecting this option will take you to the Personal Info page.

STEP #4: COMPLETE INFORMATION ON THE CUSTOMER INFORMATION PAGE

Answer each of the questions on the Personal Info page for your new ECSA customer. Required fields have a red asterisk and you must complete those in order to proceed to the calculator.

STEP #5: PROCEED TO THE CALCULATOR

After you've completed the Personal Info Page, click the "Continue to Calculator" button at the bottom of the screen.

STEP #6: ENTER CUSTOMER DATA

Enter your customer's data on the Wages/ Income and Expenses pages. You can navigate easily through the pages using either the tabs at the top of the page or the "Next" button at the bottom of each page.

STEP #7: REVIEW CUSTOMER DATA

Go to the Review page to double-check the information you have entered. Click on any of the blue "edit" buttons to make necessary changes. Once you have reviewed the information, click on the "Move to Final Report" button.

STEP #8: SAVE INFORMATION

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. Then select "Save registration data & exit calculator" and click on the "GO" button.

Editing customer registration data

STEP #1: LOCATE CUSTOMER RECORD

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

STEP #2: EDIT RECORD

Once you have located the record, click on "edit record" and use the tabs to get to the appropriate page(s) to edit registration data.

STEP #3: SAVE INFORMATION

Once you have made the necessary changes to customer registration data, go to the Final Report page. 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. Then select "Save registration data & exit calculator" and click on the "GO" button. *Please note: registration data should reflect customer information at the time of registration; only make edits if you find that the information initially entered was incorrect at the time.*

<u>Exiting an ECSA registered customer</u>

STEP #1: EXIT A CUSTOMER

The "exit" function is intended to capture the wage data when your customer secures employment as a result of participating in the EcSA program. After logging in as a case manager, use the client search field to locate the customer's record (you can search by first name, client ID, or ETO ID).

STEP #2: ENTER CUSTOMER DATA

Once you have arrived at the Personal Info page, work through each of the pages entering income and expense information as you did at registration. (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.)

STEP #3: REVIEW CUSTOMER DATA

Go to the Review page to double-check the information you have entered. Click on any of the blue "edit" buttons to make necessary changes. Once you have reviewed the information, click on the
"Move to Final Report" button.

STEP #4: SAVE INFORMATION

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 for your file. Then select "Save exit data & exit calculator" and click on the "GO" button.