

# Fresno Regional Workforce Development Board

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Blake Konczal, Executive Director

## OPERATIONAL DIRECTIVE

**FRWDB OD # 04-16, Revision R**

**Date Released: March 11, 2022**

**To: All Fresno Regional Workforce Development Board Providers of Services**

**From: Blake Konczal, Executive Director**

**Effective Date: March 11, 2022**

**Subject: Adult Service Codes**

**Applicable Program: Adult, Dislocated Worker**

**Revision History: Initial Release – 3/10/16; Rev B – 8/11/16; Rev C – 9/1/16; Rev D – 11/17/16; Rev E – 12/16/16; Rev F – 5/16/17; Rev G – 8/8/17; Rev H – 12/8/17; Rev I – 3/21/18; Rev J – 6/14/18; Rev K – 6/26/18; Rev L – 09/26/18; Rev M – 12/18/20; Rev M1 – 12/20/19; Rev N – 1/22/20; Rev O – 7/1/20; Rev O1- 7/10/20; Rev P -2/18/21; Rev Q – 3/30/21**

This Revision R changes the “clock” setting from “yes” to “no” for Service Code 106.

Effective immediately, all providers of services are to implement the use of the attached Service Code Reference Table that can be found beginning on Page 2.

The Service Code Reference Table is to be used by staff to ensure that they are using the most accurate code that best describes the activity into which the participant is being entered. All providers of services' staff must use these codes when entering enrollments and case notes.

Participants should only be placed (enrolled) into services as they actually occur and then removed (service is completed) within 3 business days of completion of the activity.

Follow-up service codes can only be provided once all other service codes are closed and a closure form has been completed and entered in CALJOBS. Follow-up supportive service codes shall only be provided during the Closure Process (90day waiting period) and during Follow-up Services (retention) for 12 months post-closure period.

Durations listed for each activity code provide the number of days the service projects into the future.

Projected or actual end dates will not be allowed to extend beyond the Duration period. “NA” denotes that duration is for the length of actual attendance in the activity. Service codes with durations of either 90 or 180 days may be extended once.

The Credential Attainment and MSG columns will contain an “X” if that training activity requires attainment of a credential and input of a Measurable Skills Gain. If no “X” is in these columns, the outcome is not required for that activity.

If there are any questions, please contact the FRWDB Program manager.

CalJOBS <sup>SM</sup> Service Code	Service Code Description	Definition	Restarts Exit Clock	Duration (Days)	Credential Attainment	MSG
101	Orientation	An individual attended an orientation informing him/her of the information and services available through the AJCC delivery system. This includes, but is not limited to, Veteran Orientation, WIOA Orientation, and Local Office Orientation.	No	1		
106	In Program Follow-up	<p>A participant who is enrolled in a but has not soft exited the program or closure form has not been entered. This code includes, but is not limited to:</p> <ol style="list-style-type: none"> <li>1. Staff met with a participant for the provision of supportive services.</li> <li>2. Staff met with participant to collect documentation related to MSGs and/or Credential attainment.</li> <li>3. Peer support groups.</li> <li>4. Contacting the participant and/or their employer on a regular or intermittent basis to offer assistance with work-related issues following job placement.</li> <li>5. Staff phone call or letter offering to visit employee and/or employer following job placement.</li> <li>6. Code is to be opened to document the process as outlined in the Cannot Locate Process of OD # 29-18, Participant Contact.</li> <li>7. Enrollment in training to secure a better-paying job; comprehensive guidance, counseling, or referral, including for alcohol and drug abuse following job placement.</li> </ol> <p>*This definition does not include Individual Counseling (200).</p>	No	1		
108	Referred to WIOA Services	A participant was referred to WIOA Title I Career Services.	Yes	1		

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109	Referred to Community Resource	AJCC staff—via phone call, email, or other means of direct contact—initiated a referral to a community resource on behalf of a participant. (This includes adult schools and other community or county services)	Yes	1		
112	Job Fair	Staff provided a participant with information regarding an upcoming job fair (e.g.: physical address, date and time) to assist the participant in locating employment opportunities.	No	1		
115	Resume Preparation Assistance	Staff provided one-on-one instruction on résumé and cover letter formats and assisted in the development of one or both. *AJCC staff assisting a participant by inputting a participant's resume into CalJOBS does not constitute as Résumé Preparation Assistance.	Yes	1		
119	Financial Aid Assistance	A participant received meaningful assistance from knowledgeable staff in exploring and/or establishing eligibility for financial aid assistance for training and education programs not covered under WIOA.	Yes	1		
120	Use of AJCC Resource Room	An individual used the services and/or equipment in the AJCC resource room. This definition also includes a staff member providing an individual with information or instruction on how to access the resource room's tools and equipment.	No	1		
121	Job Referrals Job Outside CalJOBS <sup>SM</sup> (non- Federal)	Staff referred a participant to a job opening that was neither listed in CalJOBS <sup>SM</sup> , nor by a federal department or agency.	Yes	1		

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122	Job Referral; Federal	Staff referred a participant to a job opening listed by a federal department or agency or other entity, under the jurisdiction of the US Office of Personnel Management; This definition does not include referrals to a federal contractor.	Yes	1		
123	Job Development Contact	AJCC staff assisted a participant by working with both the employer and participant. Activities include, but are not limited to: securing the participant a job interview (either in-person, telephone, email, or U.S. Mail inquiry) for a job opening not currently listed on file; or contacting a union or employer on behalf of a particular participant. Referrals to governmental and/or local public agencies for a currently advertised job listing (all sources) are not considered a valid Job Development Contact. Job Development Contacts through U. S. Mail inquiries must include a cover letter introducing the client(s) and explaining the enclosed application(s)' purpose. (e.g. CalJOBS <sup>SM</sup> , online job postings, government job listings.)	Yes	1		
125	Job Search	AJCC staff provided a participant job search and placement assistance and, including the provision of information on in-demand industry sectors and occupations, and nontraditional employment.	Yes	1		
132	Resume Writing Workshop	AJCC staff provided a resume writing workshop to two or more participants in need of resume writing assistance and/or cover letter format, and assistance in the development of one or both.	Yes	1		
133	Job Search Workshop <b>(Interview Preparation Workshop)</b>	Staff provided a job search workshop to two or more participants instructing them on résumé writing, application preparation, interview skills, and job lead development.	Yes	1		

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140	Referred to Other Federal/State Assistance	A participant was referred to other federal/state assistance, which may include, but is not limited to, Supplemental Nutrition Assistance Program (SNAP) benefits, Temporary Assistance for Needy Families (TANF), health insurance assistance, child support assistance, tax preparation support, and/or any other federal or state assistance programs.	Yes	1		
167	Referred to VA Services: Other	AJCC staff referred a participant to VA services for services other than Post-9/11 GI Bill or Montgomery GI Bill benefits. Services may include referrals for PTSD, TBI treatment, and substance abuse assistance.	Yes	1		
180	Support Service - Child/Dependent Care	A participant received assistance with child care or dependent care that enabled him or her to participate in authorized job training or job search activities. (See current Supportive Services OD for usage directions and limits).	No	1		
181	Supportive Service - Transportation Assistance	A participant received assistance with transportation that enabled him or her to participate in authorized job training or job search activities. (See current Supportive Services OD for usage directions and limits).	No	1		
184	Supportive Service - Temporary Shelter/Housing Assistance	A participant received assistance with temporary shelter that enabled him or her to participate in authorized job training or job search activities. (See current Supportive Services OD for usage directions and limits).	No	1		
185	Supportive Service - Other	A participant received assistance that was necessary to enable the individual to participate in WIOA activities. This activity code should only be used if no other Supportive Service codes apply. This service code requires staff to document the type of service provided in a case note.	No	1		

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187	Supportive Service: Job Search Allowance (drug testing, background checks)	A participant received an allowance to purchase items necessary for conducting a successful job search. These items include, but are not limited to: interview clothing, appropriate shoes, gas money, and parking costs. (See current Supportive Services OD for usage directions and limits).	No	1		
188	Supportive Service: Tools/Clothing	A participant received assistance with employment-related attire or tools, for the purpose of obtaining employment. (See current Supportive Services OD for usage directions and limits).	No	1		
189	Supportive Service: Housing Assistance	Staff provided and/or arranged for a participant to receive housing that enabled him/her to participate in career services or training activities. (See current Supportive Services OD for usage directions and limits).	No	1		
190	Supportive Service: Utilities	Staff provided and/or arranged for a participant to receive assistance with his/her utilities that enabled him/her to participate in career services or training activities. (See current Supportive Services OD for usage directions and limits).	No	1		
190	Supportive Service: Utilities	Staff provided and/or arranged for a participant to receive assistance with his/her utilities that enabled him/her to participate in career services or training activities. (See current Supportive Services OD for usage directions and limits).	No	1		
191	Supportive Service: Educational Testing	A participant received financial assistance to take a high school equivalency test, or an exam for an occupation certification or credential for the purpose of obtaining employment. (See current Supportive Services OD for usage directions and limits).	No	1		

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192	Supportive Service: Post-Secondary Academic Materials	A participant received financial assistance to purchase required academic materials while enrolled in a Post-Secondary Education program.	No	1		
200	Individual Counseling	Staff, in a one-on-one setting, provided a participant counseling and vocational guidance to assist the participant in achieving employment goals, and to make decisions regarding employment and/or training opportunities.  *This service code does not include In-Program Follow-up (106).	Yes	1		
201	Group Counseling	Staff provided counseling to a participant in a group setting to help the individual achieve employment goals and make decisions about employment and training opportunities.	Yes	1		
202	Career Guidance/ Planning	1. Staff provided a participant with information, materials, suggestions, and/or advice to help a participant make occupational or career decisions. 2. Job Ready Process activities such as Mock Interview & Job Ready Checklist 3. Career Track Application Worksheet	Yes	1		
203	Objective Assessment	Staff conducted a comprehensive, specialized assessment of skill levels and service needs of a participant. The assessment may include diagnostic testing or other assessment tools, and in-depth interviewing and evaluation to identify employment barriers and appropriate employment goals.	Yes	1		
204	Interest and Aptitudes Testing (WorkKeys, ONET Career Assessments)	Staff tested a participant's aptitude to determine whether the participant has the necessary skills and qualifications to achieve his or her employment goals, or successfully participate in a selected program of training services.	Yes	1		

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205	Development of IEP	Staff and a participant jointly developed an ongoing strategy that identified the participant's employment goals, appropriate achievement objectives, and appropriate combination of services for the participant to achieve the employment goals.	Yes	1		
209	Referred to State and/or Local Training (Non-WIOA)	Staff referred a participant to a training program funded with monies from state and/or local agencies	Yes	1		
210	Referred to Educational Services (Non-Federal/State/Local)	Staff referred a participant to a service provider funded with monies other than federal, state or local agencies monies, to receive educational services leading to the completion of the participant's educational goals. These services include, but are not limited to: tutoring, study skills training, and instruction.	Yes	1		
214	Adult Literacy, Basic Skills or GED Preparation (Skills Tutor, WIN Solutions)	Staff referred a participant to a course of basic academic instruction and/or basic education services below the post-secondary level to increase the participant's ability to read, write and speak in English, and perform mathematics or other necessary activities to obtain a secondary school diploma or its recognized equivalent; and, to transition to post-secondary education and training.	Yes	90		
215	Short Term Pre-Vocational Services	A participant is receiving short-term, prevocational services, including the development of learning, communication, interviewing skills, punctuality, personal maintenance skills, and professional conduct to prepare the participant for unsubsidized employment or training. <b>(Use code for Job Readiness Workshop and Soft Skill Remediation-Online Training <u>ONLY</u>)</b>	Yes	1		



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216	Out-of-area job search asst.	Staff assisted a participant with an out-of-area job search. The assistance was deemed appropriate based upon the participant's assessment, and/or the participant's Individual Employment Plan.	Yes	1		
217	Relocation assistance	Staff provided financial assistance to relocate in order to accept employment, as provided by local policy. See current Relocation Assistance OD	Yes	1		
218	Referred to Internship	Staff referred a participant to an internship opportunity. The internship was deemed appropriate based upon the participant's assessment, and/or the participant's individual employment plan.	Yes	180		
219	Work Experience	A participant took part in a planned, structured learning experience that took place in a private, for-profit, nonprofit, or public sector workplace for a limited time period. Work experience may be paid or unpaid, as appropriate.	Yes	180		

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221	Financial Literacy Education	A participant received financial literacy services that support the ability to: 1. Create household budgets, initiate savings plans, and make informed financial decisions about education, retirements, home ownership, wealth building, or other savings goals; 2. Manage spending credit, and debt, including credit card debt, effectively; 3. Increasing awareness of the availability and significance of credit reports and credit scores in obtaining credit, including determining their accuracy (and how to correct inaccuracies in the reports and scores), and their effect on credit terms; 4. The ability to understand, evaluate, and compare financial products, services, and opportunities; and, 5. Address the particular financial literacy needs of non-English speakers, including providing the support through the development and distribution of multilingual financial literacy and education materials.	Yes	90		
222	English Language Learner (ELL)	A participant attended an English Language Learner (ELL) program.	Yes	90		
224	Pre-Apprenticeship Career Services (not listed on the ETPL)	The participant is enrolled in a Pre-Apprenticeship (PA) program that Provides an introduction to an industry sector, work readiness skills and academic instruction to prepare the participant for entry into an approved apprenticeship program.	Yes	180		
300	Occupational Skills Training - Approved Provider List (ITA)	The participant enrolled in a State Board-approved ETPL training program designed to provide the technical skills necessary to perform a specific job or group of jobs.	Yes	NA	X	x

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301	On-The-Job Training	<p>A participant took part in paid training while engaged in productive work in a job. The training:</p> <ol style="list-style-type: none"> <li>1. Provided knowledge or skills essential to the full and adequate performance of the job; and,</li> <li>2. Provided reimbursement to the employer for up to 50% of the participant's wage rate for extraordinary costs of providing the training and additional supervision related to the training; and,</li> <li>3. Was limited in duration that was appropriate to the occupation for which the participant was being trained, taking into account the training's content, the participant's prior work experience, and the participant's service strategy, as appropriate.</li> </ol>	Yes	NA		x
302	Entrepreneurial Training	<p>A participant attended entrepreneurial skills training that included, but was not limited to: the elements of starting and operating a small business, business plan development, securing financing, general business law concepts, employee management, and the understanding marketing concepts.</p>	Yes	NA	x	x

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304	Customized Training	A participant enrolled in an employer's customized training program. The training was designed to meet the specific requirements of an employer (or a group of employers); was conducted with a commitment by the employer to employ the participant upon successful completion of the training; and for which the employer paid a significant portion of the cost of training, as determined by the Local Board in accordance with WIOA. Customized training may be provided when: 1. The participant is not earning a self-sufficient wage as determined by Local Board policy; 2. The above paragraph's requirements are met; and 3. The customized training relates to on-the-job training contracts for employed workers, or other appropriate purposes identified by the Local Board.	Yes	NA		x
305	Skills Upgrading & Retraining	A participant was provided training to upgrade his/her skills, and/or to retrain.	Yes	NA	x	x
306	WIOA Prerequisite Training	A participant enrolled in the required prerequisite training/coursework prior to entry into an institution's approved training program.	Yes	NA	x	x
307	Pre- Apprenticeship Training – ETPL listed	The participant enrolled in a Pre-Apprenticeship (PA) program that has a documented partnership with at least one Registered Apprenticeship program. The PA's training and curriculum must be based on industry standards; approved by the documented Registered Apprenticeship partner(s); and prepare the individual with the skills and competencies needed to enter one or more Registered Apprenticeship program(s).	Yes	NA	x	x

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308	Incumbent Worker Training	The participant participated in an incumbent worker training designed to meet the needs of an employer or group of employers in an effort to help avert potential layoffs, or for the employee to obtain the skills necessary to retain employment, such as increasing the skill levels of employees so they can be promoted within the company and create backfill opportunities for less-skilled employees.	No	NA		
312	Placed In Federal Training (includes TAA and WIOA)	Staff verified that a participant entered a training program supported by the federal government, such as a WIOA funded project or TAA.	Yes	1		
313	Placed in State and Local Trainings (non- TAA, non-WIOA)	Staff verified that a participant entered a state and/or local agency-funded training program. In this instance, staff should select the activity code's co-enrolled training code option. This definition does not include Job Corps (311), or Placed in Federal Training (312).	Yes	1		
320	Private Sector Training	A participant enrolled in a private sector, non-WIOA funded training program.	Yes	NA	x	x
321	Transitional Job	The participant has barriers to employment, is chronically unemployed, or has an inconsistent work history, and has been placed by the AJCC in subsidized, time-limited work within the public, private, or nonprofit sector. The participant must concurrently receive comprehensive employment and supportive services. Transitional jobs are designed to assist participants with establishing a work history, demonstrate success in the workplace, and develop the skills that lead to entry into and retention in unsubsidized employment.	Yes	NA		

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322	Job Readiness Training	<p>A participant received training regarding the skills necessary to be successful in the workplace. The training provided the participant with specific occupational competencies needed to perform specific tasks on the job. These competencies include, but are not limited to: how to communicate in an office environment, how to function as part of a team, and how to work in a deadline-driven workplace.</p> <p>This code must be applied in conjunction with one of the following codes:</p> <ul style="list-style-type: none"> <li>• Occupational skills training, including training for nontraditional employment (300)</li> <li>• On-the-job training (301)</li> <li>• Incumbent worker training (308)</li> <li>• Programs that combine workplace training with related instruction, which may include cooperative education programs (321)</li> <li>• Private sector operated training programs (320)</li> <li>• Skill upgrading and re-training (305)</li> <li>• Entrepreneurial training (302)</li> <li>• Transitional jobs (321)</li> </ul>	Yes	NA		x
325	Apprenticeship Training	A participant enrolled into a Registered Apprenticeship Program listed on the State ETPL.	Yes	NA	X	X
326	Support Service - Needs Related Payments (Training)	An unemployed Adult or Dislocated Worker participant received a needs-related payment(s) for the purpose of enabling him/her to participate in training. Unlike other supportive services, in order to qualify for needs-related payments, a participant must be enrolled in training. The participant must also be unemployed, not qualified or ceased to qualify for unemployment compensation, and be enrolled in a training services under WIOA.	No	1		

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327	Support Service - Training Allowance	The participant received an approved training allowance required in conjunction with his/her original training or education. For example, a participant is required to have completed CPR training prior to beginning Certified Nurse Assistant. Use this code only for those "pre-training" courses. These courses will not be on the statewide ETPL. See IB 05-16 for further guidance.	No	1		
328	Occupational Skills Training - Non Approved Provider (No ITA)	A participant attended training designed to provide the technical skills necessary to perform a specific job or group of jobs. The training provider was not on the statewide ETPL. This code cannot be used for formula ITAs.	Yes	NA	X	x
330	Local Board Determination Training	A participant enrolled in a training program that can bypass the ETPL upon the determination of the Local Workforce Development Board (LWDB) for reasons such as: higher education, lack of providers, barriers to employment, etc. This activity code requires staff to provide justification in case notes.	Yes	NA	X	X
346	Out of State Training Provider (other state ETPL)	A participant was enrolled with a provider headquartered outside of California, and who does not have an in-state training facility. Provider must be listed on another state's ETPL. This activity code requires staff to provide justification in CalJOBS under case notes.	Yes	NA	x	x
F01	Referral To Community Resource	A participant was referred to a community resource after being placed in unsubsidized employment, education, or training. This follow-up service was provided to the individual to enable them to progress further in their occupation or retain their employment.	No	1		
F02	Referral to Medical Services	Staff referred a participant to medical services after being placed in unsubsidized employment, education, or training. This follow-up service was provided to the individual to enable them to progress further in their occupation or retain his/her employment.	No	1		

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F03	Tracking Progress on the Job	Staff tracked a participant's progress on the job, and identified which, if any, additional follow-up services the participant required to progress further in his/her occupation or retain their employment.	No	1		
F04	Work-Related Peer Support Group	Staff referred a participant to a work-related peer support group after being placed in unsubsidized employment, education, or training. This follow-up service was provided to the individual to enable them to progress further in their occupation or retain his/her employment.	No	1		
F05	Assistance securing better paying job	A participant received assistance securing a job paying a higher wage.	No	1		
F06	Career development and further education planning	A participant received additional career planning and counseling after being placed in unsubsidized employment, education, or training. This follow-up service was provided to the individual to enable them to progress further in their occupation or retain their employment.	No	1		
F07	Assistance with Job/Work Related Problems	Staff assisted a participant with a work-related problem, which may have included contacting the participant's employer. This follow-up service was provided to the individual to enable them to progress further in their occupation or retain their employment.	No	1		
F12	Support Services – Transportation <b>Approved Waiver Only</b>	Staff provided and/or arranged for a participant to receive transportation assistance after being placed in unsubsidized employment, education, or training. This follow-up service was provided to the participant to enable him/her to further progress in his/her occupation, or retain employment. (See current Supportive Services OD for usage directions and limits).	No	1		



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F14	Support Services - Purchase work related tools	Staff provided and/or arranged a participant to receive an allowance to purchase work-related tools after being placed in unsubsidized employment, education, or training. This follow-up service was provided to the participant to enable him/her to further progress in his/her occupation, or retain his/her employment. (See current Supportive Services OD for usage directions and limits).	No	1		
F15	Supportive Services: Housing Assistance <b>Approved Waiver Only</b>	Staff provided and/or arranged for a participant to receive housing assistance after being placed in unsubsidized employment, education, or training. This follow-up service was provided to the participant to enable him/her to further progress in his/her occupation, or retain employment. (See current Supportive Services OD for usage directions and limits).	No	1		
F16	Supportive Services: Utilities <b>Approved Waiver Only</b>	Staff provided and/or arranged for a participant to receive assistance with his/her utilities after being placed in unsubsidized employment, education, or training. This follow-up service was provided to the participant to enable him/her to further progress in his/her occupation, or retain employment. (See current Supportive Services OD for usage directions and limits).	No	1		
F17	Supportive Services: Dependent Care <b>Approved Waiver Only</b>	Staff provided and/or arranged for a participant to receive child care or dependent care assistance after being placed in unsubsidized employment, education, or training. This follow-up service was provided to the participant to enable him/her to further progress in his/her occupation, or retain employment. (See current Supportive Services OD for usage directions and limits).	No	1		
F21	Supportive Services: Educational Testing	A participant received financial assistance in obtaining a High School equivalency certificate, a license, or other type certificate, for the purpose of obtaining employment. (See current Supportive Services OD for usage directions and limits).	No	1		