



# Montana Department of LABOR & INDUSTRY

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2 **Division: Workforce Services Division**  
3 **Category: Programs**  
4 **Effective Date: 9/16/2016**  
5 **Last Revised: 4/1/2020**  
6 **Policy No.: 04-16**

## 7 Health and Economic Livelihood Partnership (HELP) Link 8 Interim Policy

### 9 Background

10 The 2015 Montana Legislature established the Health and Economic Livelihood Partnership (HELP) Act through  
11 a collaborative effort between Department of Public Health and Human Services (DPHHS) and Montana  
12 Department of Labor and Industry (MDLI) in Senate Bill 405. The 2019 Montana Legislature extended the  
13 Medicaid expansion program in House Bill 658. HELP-Link is the MDLI-implemented workforce development  
14 program created to identify workforce development opportunities focusing on specific labor force needs within  
15 the state of Montana; reduce the number of people depending on social programs, including the HELP Act;  
16 provide grants to employers who hire and train HELP-Link clients; and increase the earning capacity, economic  
17 stability, and self-sufficiency of clients so they are able to purchase their own health insurance coverage.

### 18 Scope

19 This policy applies to all Job Service Montana Workforce Consultants, Office Managers, and Supervisors;  
20 Montana Department of Labor and Industry Central Office staff including the HELP-Link Program Manager and  
21 the HELP-Link monitoring team. The policy is effective April 1, 2020.

### 22 Policy

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- 24 • Participation in HELP-Link is voluntary.
  - 25 • Enrolled HELP-Link clients must receive a staff-assisted service at least every 90 days.
  - 26 • MDLI will notify DPHHS when a client has exhausted all reasonably available services.
  - 27 • Documentation must be recorded in the management information system within 7 working days of appointments.

### 28 HELP-Link Eligibility

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- 30 • Eligibility for Medicaid Expansion medical coverage is determined by the Department of Public Health and Human Services.
  - 31 • Only individuals currently receiving Medicaid Expansion medical coverage or qualifying Affordable Care Act (ACA) medical coverage may qualify for HELP-Link enrollment.
    - 32 ○ HELP-Link enrollment categories are limited to ACA Adult, ACA Adult Medicaid, ACA Pregnant
    - 33 Woman, and ACA Parent/Specified Caretaker Relative.
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  - 35 • Once an individual is enrolled in HELP-Link the client will remain eligible for HELP-Link services until  
36 exited from the program, regardless of medical coverage enrollment status.

37 **Appointments**

- 38 • HELP-Link eligible individuals will be offered the option to participate in an employment or
- 39 reemployment assessment. The assessment will help identify probable barrier(s) to employment and
- 40 services to help address the barrier(s) to employment. HELP-Link eligible individuals will be offered the
- 41 option of participating in the workforce development program.
- 42 • Every intake appointment must complete the client intake process.
- 43 • All HELP-Link appointments must contain a staff-assisted service.
- 44 ○ If a client does not participate to the point of receiving a staff-assisted service, a general note
- 45 explaining the appointment is required.
- 46 • Clients may request a phone appointment when extenuating circumstances prevent attending in
- 47 person.

48 **HELP-Link Enrollment**

- 49 • HELP-Link enrollment requires minimum completion of:
  - 50 ○ Enrollment in the management information system
  - 51 ○ Labor Market Information
  - 52 ○ Orientation to services
  - 53 ○ Completion of an employment plan - signed by the client
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- 55 • Clients are eligible for the following services after being enrolled in HELP-Link:

56 **Training**

- 57 • The employment plan must reflect the need of training to obtain or maintain employment.
- 58 • Job Service Montana staff is responsible for ensuring the training provider is a legitimate and reputable
- 59 entity.
- 60 • The training provider must be willing and able to submit a W-9 form to receive payment.
- 61 • HELP-Link funds may be used for training that leads to self-employment.

62 **On-the-Job Training (OJT)**

- 63 • All HELP-Link clients approved for a HELP-Link OJT must be co-enrolled with WIOA adult.
- 64 • All HELP-Link OJTs must follow the MDLI On-the-Job Training (OJT) Policy along with MDLI OJT
- 65 operational guidance.
- 66 • HELP-Link funded OJTs are not available to state government or staffing agency placements.

67 **Supportive Services**

- 68 • Supportive Services are limited to payments for goods and services reasonable and necessary for the
- 69 enrolled client to participate in HELP-Link activities or to obtain employment.
- 70 • Supportive services must be paid directly to a vendor with the exception of allowable client payments.
- 71 All vendors must be willing and able to submit a W-9 form to receive payment.
- 72 • All supportive services must adhere to the guidelines in Cost Principles, Allowable Costs and
- 73 Unallowable Costs Policy.
- 74 • Supportive services are allowable:
  - 75 ○ During enrollment in HELP-Link and the first 30 days in HELP-Link Follow-up
  - 76 ○ When the client is actively participating in HELP-Link
  - 77 ○ When there is no other funding source (including the client's own resources) and such finding
  - 78 must be documented in the client's file
  - 79 ○ For expenses incurred during enrollment in HELP-Link
  - 80 ○ When the amount of such assistance is based on the results of a financial assessment
  - 81 ○ When the client's employment plan reflects the need for assistance
  - 82 ○ When approval is granted prior to the client receiving or obtaining the goods or services
  - 83 (backdated requests for goods or services are not allowable)

- 84                   ○ When source documentation is in the client's file (accepting a client's self-attestation of  
85                   expenses as source documentation is not allowable)
- 86                   ● Supportive Service requests must document the need for assistance and be completed prior to receipt  
87                   of the payment. The supportive service request must include:
- 88                   ○ A brief description of the expenditure;  
89                   ○ Dollar amount requested; and  
90                   ○ Signatures of both staff and client, as well as the date the request was signed.  
91                       ▪ Electronic signatures are permitted.
- 92                   ● Supportive Service specifics
- 93                   ○ **Health Care and Medical** expenses are of a one-time nature; they cannot be ongoing. Must be  
94                   needed to enable the client to participate in HELP-Link activities. Health insurance payments  
95                   are not an allowable expense for HELP-Link.
- 96                   ○ **Childcare** expenses required to ensure proper care of children only while the parent or guardian  
97                   is participating in employment and/or training activities. The parent or guardian must first apply  
98                   for the Best Beginnings Childcare Scholarship before HELP-Link funds may be utilized. The  
99                   childcare provider must be licensed or registered. If no licensed and/or registered provider of  
100                   care is available or adequate, payment to a non-licensed or non-registered provider is allowable,  
101                   however, the client's file must contain documentation from the Best Beginnings program  
102                   indicating no licensed and/or registered provider is available in the client's location. Allowable  
103                   childcare cost may be reimbursed up to the Statewide Best Beginnings Reimbursement Rates.
- 104                   ○ **Transportation** expenses required to participate in HELP-Link activities. Purchase of vehicles  
105                   and car payments are not allowable.
- 106                       ▪ Public and private transportation is payable up to the current rate per state travel policy.  
107                       Each office may opt to set a lower rate but must be consistent for all clients.  
108                       ▪ Inter-community travel is payable round trip to account for traveling to and returning from  
109                       training. Multiple round trip travel expenses are not payable unless lodging cost exceed  
110                       travel cost to and from the training facility. Mileage costs are only paid for the most direct  
111                       route.
- 112                   ○ **Lodging** expenses required to participate in HELP-Link activities. Rates may be payable up to  
113                   the current rate per state travel policy.
- 114                   ○ **Automobile Liability Insurance** only may be paid if it enables the client to participate in HELP-  
115                   Link activities or obtain employment. No more than 3 months' coverage may be paid at a time.  
116                   The vehicle being insured must be owned by the client or family within the client's documented  
117                   household and the vehicle is the only vehicle available to the client. If the vehicle is owned by a  
118                   family member, written documentation must be obtained from the vehicle owner granting  
119                   permission to use and insure the vehicle as well as a statement that the vehicle is the only  
120                   means of transportation for the client. Vehicle registration must be obtained and included as  
121                   part of the supportive service request. Liability coverage does not include optional coverage  
122                   such as medical payment coverage, uninsured motor vehicle coverage, underinsured motor  
123                   vehicle coverage, comprehensive coverage, collision coverage, emergency road service or  
124                   membership fees to insurance companies.
- 125                   ○ **Automobile Repair** is payable if the repair enables the client to participate in HELP-Link activities  
126                   or obtain employment. The vehicle being repaired must be owned by the client or family within  
127                   the client's documented household and the vehicle is the only vehicle available to the client. If  
128                   the vehicle is owned by a family member, written documentation must be obtained from the  
129                   vehicle owner granting permission to use and repair the vehicle as well as a statement that the  
130                   vehicle is the only means of transportation for the client. Vehicle registration, proof of liability  
131                   insurance, documentation of the vehicle value, and at least 2 repair quotes must be obtained  
132                   and included as part of the supportive service request. Payment is allowable for the lesser of  
133                   the two quotes. Repair costs which exceed the value of the vehicle are not allowed.

- 134 ○ **Work and Training Related Tools, Equipment, and Attire** may be purchased for clients, if the items
- 135 are required to continue a training program or obtain employment and cannot be provided by any
- 136 other source. Tools, equipment, and attire needed for self-employment is allowable.
- 137 ○ **Housing** expenses for rent payments only. Mortgage payments, rental deposits (including last
- 138 month's rent), insurance, and property taxes are not allowable. Documentation of rental or lease
- 139 agreement must be in the clients file. Payments must be made directly to the landlord. The
- 140 landlord must be willing and able to submit a W-9 form to receive payment.
- 141 ○ **Out of Area Job Search** assistance includes expenses related to travel and lodging when a
- 142 documented interview is provided prior to authorization.
- 143 ○ **Employment Relocation** assistance includes expenses related to travel and lodging when relocating
- 144 for a job offer which is presented prior to authorization. Assistance may continue until employment
- 145 begins. Relocation must be greater than 50 miles from the client's community.
- 146 ○ **Internet Services** for clients enrolled in online training or if it enables the client to seek or obtain
- 147 employment. Payments may only be made on a monthly basis.
- 148 ○ **Educational Testing** needed to participate in HELP-Link activities.
- 149 ○ **Employment and Training Related** expenses required to continue a training program or obtain
- 150 employment and cannot be provided by any other source.
- 151 ○ **Computers and Technology Devices** are allowable in limited cases where the item is reasonable
- 152 and necessary for training activities. Prior supervisor approval must be obtained before
- 153 purchase and documentation justifying the expense must be kept in the client's file.
- 154 ○ **Supportive Services Paid Directly to Clients** are only allowable for mileage, meals, and lodging
- 155 during travel.
  - 156 ▪ Mileage, meals, and lodging payments made to a client must be paid prior to or during
  - 157 training and may only be paid for a maximum of two (2) weeks at a time.
  - 158 ▪ Mileage, meals, and lodging rates may be payable up to the current rate per state travel
  - 159 policy. Each office may set their own rate but must be consistent for all clients.
  - 160 ▪ Written supervisor approval is required prior to exceeding \$1,000 in direct to client
  - 161 payments.
  - 162 ▪ Each payment must be documented on the Direct Client Payment Log (WIOA.20) and
  - 163 counts toward the \$1,000 limit.
  - 164 ▪ The payment log and the written approval must be kept in the client's file.
- 165 ○ **Other Supportive Services** may be provided when they are reasonable and necessary for the
- 166 client to continue participation in HELP-Link activities or obtain employment. Examples of these
- 167 goods and services may include:
  - 168 ▪ Personal grooming and hygiene needs
  - 169 ▪ Financial literacy
  - 170 ▪ Current utilities: power, water/sewer, gas/propane, telephone bills/phone cards
- 171 ● **Unallowable Supportive Services**
  - 172 ○ Payments for titled or deeded items
  - 173 ○ When recovery of the expense is anticipated
  - 174 ○ Fines or restitution
  - 175 ○ Business start-up costs considered to be capitalization
  - 176 ○ Acquisition of business assets

### HELP-Link Follow-Up

- 177 ● Employed HELP-Link clients are eligible to transition to HELP-Link Follow-up when they are no longer in
- 178 need of staff-assisted services. Unemployed HELP-Link clients cannot transition to HELP-Link Follow-up.
- 179 ● HELP-Link clients must participate in staff-assisted HELP-Link services before being eligible for HELP-
- 180 Link Follow-up. Receiving HELP-Link Diversion Assistance only does not qualify a client for HELP-Link
- 181 Follow-up.
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- HELP-Link Follow-up may continue for up to one (1) year. HELP-Link Follow-up will end sooner if the client is no longer employed or per client request. The client may opt to re-enroll in HELP-Link at anytime during HELP-Link Follow-up, if appropriate and eligible.
  - Clients are eligible for Work Support Payments during HELP-Link Follow-up.

187 *Work Support Payments*

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- Work support payments are intended to enable a client to maintain employment.
  - Work support payments are not appropriate for reoccurring basic needs or monthly expenses, unless extenuating circumstances exist and are clearly documented.
  - Must be paid directly to a vendor. All vendors must be willing and able to submit a W-9 form to receive payment.
  - All work support payments must adhere to guidelines in the Cost Principles, Allowable Costs and Unallowable Costs Policy.
  - Work support payments are allowable:
    - After the first 30 days in HELP-Link Follow-up
    - When there is no other funding source (including the client's own resources) and such finding must be documented in the client's file
    - For expenses incurred during HELP-Link Follow-up
    - When the amount of such assistance is based on the results of a financial assessment
    - When the client's employment plan reflects the need for assistance
    - When approval is granted prior to the client receiving or obtaining the goods or services (backdated request for goods or services are not allowable)
    - When source documentation is in the client's file (accepting a client's self-attestation of expenses as source documentation is not allowable)
  - Work Support Payment requests must document the need for assistance and be completed prior to receipt of the payment. The work support payment request must include:
    - A brief description of the expenditure;
    - Dollar amount requested;
    - Documentation that the client is currently employed; and
    - Signatures of both staff and client, as well as the date the request was signed.
      - Electronic signatures are permitted.

213 **HELP-Link Diversion Assistance**

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- HELP-Link Diversion Assistance offers clients one-time, short-term financial assistance without the requirement to fully enroll in HELP-Link.
  - HELP-Link Diversion Assistance is not appropriate for clients currently enrolled in any Title IB or State Displaced Homemaker program.
  - HELP-Link Diversion Assistance is limited to payments for goods and services reasonable and necessary for the HELP-Link eligible client to obtain or maintain employment.
  - Only individuals currently receiving Medicaid Expansion medical coverage or qualifying Affordable Care Act (ACA) medical coverage may qualify for HELP-Link Diversion Assistance. Current enrollment status must be verified prior to any diversion assistance payments being made.
    - HELP-Link enrollment categories are limited to ACA Adult, ACA Adult Medicaid, ACA Pregnant Woman, and ACA Parent/Specified Caretaker Relative.
  - At minimum, the following must be entered into the management information system before payment is allowable:
    - Basic Profile
    - Client Intake Process
    - Enrollment Screen
    - Employment Plan
    - Funding Screen

- 232 • Payment(s) may not exceed \$250, per client per state fiscal year.
- 233 • A diversion assistance application must be completed prior to making the payment. The application
- 234 must reflect the need for assistance and the amount of such assistance based on the results of a
- 235 financial assessment.
- 236 • Diversion assistance payments must be:
  - 237 ○ paid directly to a vendor (All vendors must be willing and able to submit a W-9 form to receive
  - 238 payment)
  - 239 ○ for one-time expenses; payments are not intended for ongoing expenses
  - 240 ○ allowable per the supportive service policy and follow all applicable policy for the payment type
  - 241 ○ not available by any other funding source (including the client's own resources) and such finding
  - 242 must be documented in the client's file
  - 243 ○ approved prior to the client receiving or obtaining the goods or services (backdated requests for
  - 244 goods or services will not be approved)
  - 245 ○ accompanied by source documentation maintained in the client's file (accepting a clients self-
  - 246 attestation of expenses as source ducmentation is not allowable)

## 247 Client Expenses

- 248 • Total HELP-Link expenses cannot exceed \$2,500 per client per state fiscal year. A written request and
- 249 approval from the Program Manager is required prior to exceeding \$2,500 and for every payment
- 250 thereafter, during the fiscal year. Documentation of the waiver request and determination must be kept
- 251 in the client's file.

## 252 Workforce Development Grant Program

- 253 • The Workforce Development Grant Program helps employers defray cost of hiring or employing HELP-
- 254 Link clients and is intended to allow the client to obtain new or improved employment, obtain a job with
- 255 health care insurance, earn a wage that allows them to purchase their own health care insurance, or
- 256 improve their long-term financial security.
- 257 • Employers must apply using a Workforce Development Grant Application. Applications must be
- 258 processed within 10 business days. If eligibility changes within the application month, a new
- 259 application is not necessary.
- 260 • Only pre-approved applications will receive reimbursement for allowable expenses.
- 261 • Employees must be HELP-Link eligible or currently enrolled in HELP-Link (or HELP-Link Follow-up) during
- 262 the application month.
- 263 • An employer is not eligible for the Workforce Development Grant on behalf of themselves, an immediate
- 264 family member, or any other individual where a conflict of interest is present.
- 265 • The Workforce Development Grant Program period is the application month plus 11 months for a total
- 266 of 12 months.
- 267 • Grant total cannot exceed \$5,000 per client.
- 268 • Payments for actual expenses (not to exceed maximum allowable) will be processed within five (5)
- 269 business days.
- 270 • Employer must:
  - 271 ○ Be willing and able to submit a W-9 form to receive payment
  - 272 ○ Operate in Montana
  - 273 ○ Be registered with the Montana Secretary of State
  - 274 ○ Not be state government or a temporary agency
- 275 • Grants may be awarded in one or more of the following categories:
  - 276 ○ Employer provides permanent increased hourly wage for the purpose of employee retention.
    - 277 ■ Client's increased wage must exceed 150% federal poverty level for the client's household
    - 278 size.
    - 279 ■ Grants are available for the sum of the increased wage minus the previous wage.

- 280                   ▪ Grants are paid through a reimbursement process with appropriate documentation.
- 281           ○ Employer purchases training (or testing) for the purpose of upgrading employee skills.
- 282                   ▪ Training must demonstrate to be an integral part of an employer plan for employee
- 283                             retention, skill improvement, wage enhancement, or financial literacy/security.
- 284                   ▪ Training must be conducted by a legitimate and reputable entity.
- 285                   ▪ Total cost of training may be paid on behalf of the client.
- 286                   ▪ Training must be located in the United States.
- 287                   ▪ Training costs reimbursed to the employer:
  - 288                             • Employer must submit a Workforce Development Grant Application and receive
  - 289                             pre-approval. Backdated requests for training completed and/or paid prior to
  - 290                             the training request pre-approval cannot be reimbursed.
  - 291                             • Employer must submit payment receipts for allowable expenses.
- 292                   ▪ Training costs paid to the trainer:
  - 293                             • Employer must submit a Workforce Development Grant Application and receive
  - 294                             pre-approval, prior to enrollment in training.
  - 295                             • Employer must submit training expense verification.
  - 296                             • Payment will be made directly to the trainer. The training provider must be
  - 297                             willing and able to submit a W-9 form to receive payment.
  - 298                             • Training costs paid directly to the trainer count toward the client's maximum
  - 299                             allowable workforce development grant.
- 300           ○ Employer provides health care insurance sufficient to disenroll client from Montana Medicaid.
- 301                   ▪ Grants are available to employers on behalf of a client who gains employment with
- 302                             employer provided health care insurance.
- 303                   ▪ Grants are available for actual cost of providing health coverage during the first year of
- 304                             employment.
- 305                   ▪ Grants are paid through a reimbursement process with appropriate documentation.
- 306           ○ Employer provides the employee with work related tools, equipment, and/or attire normally a
- 307                   requirement of the employee to purchase/provide themselves.
- 308                   ▪ Items purchased must be permanently owned by the client.
- 309                   ▪ The client must sign the invoice as proof they received the item(s).
- 310                   ▪ Grants are paid through a reimbursement process with appropriate documentation.

## 311 Administrative Requirements

- 312           • Feedback to and from both DPHHS and DLI to communicate client involvement in HELP-Link and
- 313                   services provided.
- 314           • Provide data and information to legislative subcommittees regarding program participation,
- 315                   expenditures, and outcomes.
- 316           • Provide data and reports to DPHHS as needed.

## 317 Oversight and Evaluation

- 318           • Oversight and evaluation will be conducted by the Program Manager and/or designee(s).

## 319 References

- 320           • [2015 Montana Legislature Senate Bill 405](#)
- 321           • [2019 Montana Legislature House Bill 658](#)
- 322           • [Montana Code Annotated \(MCA\), 39-12](#)