



Montana Department of LABOR & INDUSTRY

1 Division: Workforce Services Division
2 Category: Programs
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5 Policy No.: 04-16

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

8 Background

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

17 Scope

18 This policy applies to all Job Service Montana Workforce Consultants, Office Managers, and Supervisors;
19 Montana Department of Labor and Industry Central Office staff including the HELP-Link Program Manager and
20 the HELP-Link monitoring team. The policy is effective November 16, 2020.

21 Policy

- 22 • Participation in HELP-Link is voluntary. HELP-Link eligible individuals have the option to participate in
23 an employment or re-employment assessment. The assessment will help identify probable barrier(s) to
24 employment and services to help address the barrier(s) to employment. HELP-Link eligible individuals
25 have the option of participating in the workforce development program.
- 26 • Enrolled HELP-Link clients must receive a staff-assisted service at least every 90 days.
- 27 • MDLI will notify DPHHS when a client has exhausted all reasonably available services.
- 28 • Documentation must be recorded in the management information system within 7 working days of
29 appointments.

30 HELP-Link Eligibility

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

39 Appointments

- 40 • All HELP-Link appointments must contain a staff-assisted service.
 - 41 ○ If a client does not participate to the point of receiving a staff-assisted service, the case note
 - 42 must thoroughly explain the appointment.
- 43 • Clients may request a phone appointment when extenuating circumstances prevent attending in
- 44 person.

45 Intake Appointments

- 46 • At every intake appointment the following must be completed:
 - 47 ○ Client intake process
 - 48 ○ Employment/Re-employment Assessment

49 HELP-Link Enrollment

- 50 • HELP-Link enrollment requires minimum completion of:
 - 51 ○ Enrollment in the management information system
 - 52 ○ Labor Market Information
 - 53 ○ Orientation to services
 - 54 ○ Completion of an employment plan - signed by the client
 - 55 ○ Referral to financial literacy courses
- 56 • Clients are eligible for the following services after being enrolled in HELP-Link and are in compliance
- 57 with the financial literacy component:

58 Training

- 59 • The employment plan must reflect the need of training to obtain or maintain employment.
- 60 • Job Service Montana staff are responsible for ensuring the training provider is a legitimate and
- 61 reputable entity.
- 62 • Only expenses incurred during enrollment in HELP-Link are allowable.
- 63 • Training expenses can be paid only when there is no other funding source (including financial aid) and
- 64 such a finding must be documented in the client's file.
- 65 • The training provider must be willing and able to submit a W-9 form to receive payment.
- 66 • HELP-Link funds may be used for training that leads to self-employment.

67 On-the-Job Training (OJT)

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

72 Supportive Services

- 73 • Supportive Services are limited to payments for goods and services reasonable and necessary for the
- 74 enrolled client to participate in HELP-Link activities or to obtain employment.
- 75 • Supportive services must be paid directly to a vendor with the exception of allowable client payments.
- 76 All vendors must be willing and able to submit a W-9 form to receive payment.
- 77 • All supportive services must adhere to the guidelines in Cost Principles, Allowable Costs and
- 78 Unallowable Costs Policy.
- 79 • Supportive services are allowable:
 - 80 ○ During enrollment in HELP-Link and the first 30 days in HELP-Link Follow-up
 - 81 ○ When the client is actively participating in HELP-Link
 - 82 ○ When there is no other funding source (including the client's own resources) and such finding
 - 83 must be documented in the client's file
 - 84 ○ For expenses incurred during enrollment in HELP-Link
 - 85 ○ When the amount of such assistance is based on the results of a financial assessment

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

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

182 Financial Literacy Services

- 183 ● All enrolled HELP-Link clients must participate in Financial Literacy services.
- 184 ● HELP-Link funding may only be expended on clients in compliance with Financial Literacy services.
- 185 Compliance includes participation in:
 - 186 ○ Intake session and setting an action plan
 - 187 ○ Working toward action plan goals
 - 188 ○ Final session and exit from services

- 189 • Clients are eligible for financial incentives (up to \$100) after completion of identified Financial Literacy
- 190 activities. Incentive activities include:
- 191 ○ Intake session (\$25)
- 192 ○ Completed Budget and Credit Report (\$25)
- 193 ○ Minimum Four (4) Completed Activities (\$25)
- 194 ○ Exit Session (\$25)
- 195 • Clients are eligible for financial assistance (phone and internet access only) to support participation in
- 196 Financial Literacy services. Vendor payments are required.

197 **HELP-Link Follow-Up**

- 198 • Employed HELP-Link clients are eligible to transition to HELP-Link Follow-up when they are no longer in
- 199 need of staff-assisted services. Unemployed HELP-Link clients cannot transition to HELP-Link Follow-up.
- 200 • HELP-Link clients must participate in staff-assisted HELP-Link services before being eligible for HELP-
- 201 Link Follow-up. Receiving HELP-Link Diversion Assistance only does not qualify a client for HELP-Link
- 202 Follow-up.
- 203 • Financial Literacy course completion is required before employed HELP-Link clients may transition to
- 204 HELP-Link Follow-up.
- 205 • HELP-Link Follow-up may continue for up to one (1) year. HELP-Link Follow-up will end sooner if the
- 206 client is no longer employed or per client request. The client may opt to re-enroll in HELP-Link at
- 207 anytime during HELP-Link Follow-up, if appropriate and eligible.
- 208 • Clients are eligible for Work Support Payments during HELP-Link Follow-up.

209 *Work Support Payments*

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

235 **HELP-Link Diversion Assistance**

- 236 • HELP-Link Diversion Assistance offers clients one-time, short-term financial assistance without the
- 237 requirement to fully enroll in HELP-Link.

- 238 • HELP-Link Diversion Assistance is not appropriate for clients currently enrolled in any Title IB or State
239 Displaced Homemaker program.
- 240 • HELP-Link Diversion Assistance is limited to payments for goods and services reasonable and necessary
241 for the HELP-Link eligible client to obtain or maintain employment.
- 242 • Only individuals currently receiving Medicaid Expansion medical coverage or qualifying Affordable Care
243 Act (ACA) medical coverage may qualify for HELP-Link Diversion Assistance. Current enrollment status
244 must be verified prior to any diversion assistance payments being made.
 - 245 ○ HELP-Link enrollment categories are limited to ACA Adult, ACA Adult Medicaid, ACA Pregnant
246 Woman, and ACA Parent/Specified Caretaker Relative.
- 247 • At minimum, the following must be entered into the management information system before payment is
248 allowable:
 - 249 ○ Basic Profile
 - 250 ○ Client Intake Process
 - 251 ○ Enrollment Screen
 - 252 ○ Employment Plan
 - 253 ○ Funding Screen
- 254 • Payment(s) may not exceed \$250, per client per state fiscal year.
- 255 • A diversion assistance application must be completed prior to making the payment. The application
256 must reflect the need for assistance and the amount of such assistance based on the results of a
257 financial assessment.
- 258 • Diversion assistance payments must be:
 - 259 ○ paid directly to a vendor (All vendors must be willing and able to submit a W-9 form to receive
260 payment)
 - 261 ○ for one-time expenses; payments are not intended for ongoing expenses
 - 262 ○ allowable per the supportive service policy and follow all applicable policy for the payment type
 - 263 ○ not available by any other funding source (including the client's own resources) and such finding
264 must be documented in the client's file
 - 265 ○ approved prior to the client receiving or obtaining the goods or services (backdated requests for
266 goods or services will not be approved)
 - 267 ○ accompanied by source documentation maintained in the client's file (accepting a client's self-
268 attestation of expenses as source documentation is not allowable)

269 Client Expenses

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

274 Workforce Development Grant Program

- 275 • The Workforce Development Grant Program helps employers defray cost of hiring or employing HELP-
276 Link clients and is intended to allow the client to obtain new or improved employment, obtain a job with
277 health care insurance, earn a wage that allows them to purchase their own health care insurance, or
278 improve their long-term financial security.
- 279 • Employers must apply using a Workforce Development Grant Application. Applications must be
280 processed within 10 business days. If eligibility changes within the application month, a new
281 application is not necessary.
- 282 • Only pre-approved applications will receive reimbursement for allowable expenses.
- 283 • Employees must be HELP-Link eligible or currently enrolled in HELP-Link (or HELP-Link Follow-up) during
284 the application month.
- 285 • An employer is not eligible for the Workforce Development Grant on behalf of themselves, an immediate
286 family member, or any other individual where a conflict of interest is present.

- 287 • Workforce Development Grants are not intended to supplement any other service or funding source
- 288 (including HELP-Link funding).
- 289 • The Workforce Development Grant Program period is the application month plus 11 months for a total
- 290 of 12 months.
- 291 • Grant total cannot exceed \$5,000 per client.
- 292 • Payments for actual expenses (not to exceed maximum allowable) will be processed within five (5)
- 293 business days.
- 294 • Employer must:
 - 295 ○ Be willing and able to submit a W-9 form to receive payment
 - 296 ○ Operate in Montana
 - 297 ○ Be registered with the Montana Secretary of State
 - 298 ○ Not be state government or a temporary agency
- 299 • Grants may be awarded in one or more of the following categories:
 - 300 ○ Employer provides permanent increased hourly wage for the purpose of employee retention.
 - 301 ▪ Client's increased wage must exceed 150% federal poverty level for the client's household
 - 302 size.
 - 303 ▪ Grants are available for the sum of the increased wage minus the previous wage.
 - 304 ▪ Grants are paid through a reimbursement process with appropriate documentation.
 - 305 ○ Employer purchases training (or testing) for the purpose of upgrading employee skills.
 - 306 ▪ Training must demonstrate to be an integral part of an employer plan for employee
 - 307 retention, skill improvement, wage enhancement, or financial literacy/security.
 - 308 ▪ Training must be conducted by a legitimate and reputable entity.
 - 309 ▪ Total cost of training may be paid on behalf of the client.
 - 310 ▪ Training must be located in the United States.
 - 311 ▪ Training costs reimbursed to the employer:
 - 312 • Employer must submit a Workforce Development Grant Application and receive
 - 313 pre-approval. Backdated requests for training completed and/or paid prior to
 - 314 the training request pre-approval cannot be reimbursed.
 - 315 • Employer must submit payment receipts for allowable expenses.
 - 316 ▪ Training costs paid to the trainer:
 - 317 • Employer must submit a Workforce Development Grant Application and receive
 - 318 pre-approval, prior to enrollment in training.
 - 319 • Employer must submit training expense verification.
 - 320 • Payment will be made directly to the trainer. The training provider must be
 - 321 willing and able to submit a W-9 form to receive payment.
 - 322 • Training costs paid directly to the trainer count toward the client's maximum
 - 323 allowable workforce development grant.
 - 324 ○ Employer provides health care insurance sufficient to disenroll client from Montana Medicaid.
 - 325 ▪ Grants are available to employers on behalf of a client who gains employment with
 - 326 employer provided health care insurance.
 - 327 ▪ Grants are available for actual cost of providing health coverage during the first year of
 - 328 employment.
 - 329 ▪ Grants are paid through a reimbursement process with appropriate documentation.
 - 330 ○ Employer provides the employee with work related tools, equipment, and/or attire normally a
 - 331 requirement of the employee to purchase/provide themselves.
 - 332 ▪ Items purchased must be permanently owned by the client.
 - 333 ▪ Payment to Employer:
 - 334 • The client must sign the invoice as proof they received the item(s).
 - 335 • Grants are paid through a reimbursement process with appropriate
 - 336 documentation.
 - 337 ▪ Payment to Vendor:

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- The employer must submit a W-9 form for the vendor and an invoice requesting direct vendor payment, before any payment is made.

340 Administrative Requirements

- 341 • Feedback to and from both DPHHS and DLI to communicate client involvement in HELP-Link and
342 services provided.
- 343 • Provide data and information to legislative subcommittees regarding program participation,
344 expenditures, and outcomes.
- 345 • Provide data and reports to DPHHS as needed.

346 Oversight and Evaluation

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

348 References

- 349 • [2015 Montana Legislature Senate Bill 405](#)
- 350 • [2019 Montana Legislature House Bill 658](#)
- 351 • [Montana Code Annotated \(MCA\), 39-12](#)