

Workforce One

Activity User Guide

Adult/Dislocated Worker (DW)

October 2019



The **Activity** is a service or an event a person participates in as a means of accomplishing program goals

Activities entered in WF1 are also used for reporting purposes

Refer to the following policies for additional information:

- **Enrollment**
- **Allowable Activities**
- **Training**

Add Activity	Page	1
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ADD ACTIVITY

The following **Activities** are added to a person's WF1 record when the **MIS Unit** completes the initial enrollment.

1. Staff Assisted Assessment
2. Career Counseling
3. Individual Plan Development

Additional **Activities** should be added to the record by the **Employment Counselor** when the person begins an **Activity**, e.g. Training, Job Search, Employment, etc.... WF1 **Activities** are used for reporting purposes and should be kept up-to-date.

To add an **Activity**, click on the **Activity** link found on the left navigation panel.

General

- At-A-Glance
- Contact
- Tickler
- Demographics
- Work Preferences
- MN Works Resume

Case Note

- Add Case Note
- Case Note Quick
- Case Note Search

Cases

- Program/New App
- Eligibility/Enrollment
- Activity**
- TAA
- Plan
- Credential

Activity Summary

Wizard O Oz Record ID 100000968
Birth Date 03/01/1974

▼ Hide Adult Seq 2 - Enrolled

Enrollment Date: 07/10/2019 Exit Date:

Activity: Subtype: Work Exp Type	Funding Stream	Start Date/End Date	Staff: Agency	Action
Indv Plan Dvpm	Ramsey WDA-15 PY18 WIOA Adult Formula	07/10/2019 Open	Laurie J Doheny WF Solutions	Edit Delete Cop
Career Counseling	Ramsey WDA-15 PY18 WIOA Adult Formula	07/10/2019 Open	Laurie J Doheny WF Solutions	Edit Cop
Staff Assist Assess	Ramsey WDA-15 PY18 WIOA Adult Formula	07/10/2019 Open	Laurie J Doheny WF Solutions	Edit Cop

Add Adult Activity

Click **Add Adult Activity**

The panel shown below will appear.

Adult Activity

Wizard O Oz Record ID 1000
Birth Date 03/01/1974

Program Seq 2

Agency: Location Ramsey County Workforce Solutions: North St. Paul

Enrollment Date 07/10/2019

Entered by Laurie J Doheny

*Assign to Staff Doheny, Laurie (Current Primary)

*Activity Type None Selected

Next Cancel

Activity Type* - select the appropriate **Activity**

*A list of **Activity Types** begins on page 7.

Note: Training activities will not appear for selection until there is an active Plan for the person. Refer to the **WF1 Plan User Guide**

Click **Next** and the panel shown on the following page will appear

ADD ACTIVITY continued

In this example, the **Staff Assisted Job Search in Area** is being added.

General

At-A-Glance
 Contact
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 Work Preferences
 MN Works Resume

Case Note

Add Case Note
 Case Note Quick
 Case Note Search

Cases

Program/New App
 Eligibility/Enrollment

Activity

TAA

Plan
 Credential
 Reporting Collection
 Youth Performance
 Participation Hours
 Exit
 Follow-Up
 Case Assignment
 Service Model

EDS

Add Document
 Document Summary

DHS-IX

MAXIS
 Incoming Status Update
 Referral

Adult Activity

Wizard O Oz Record ID 100000968
 Birth Date 03/01/1974

Program Seq 2
 Agency: Location Ramsey County Workforce Solutions: North St. Paul
 Enrollment Date 07/10/2019
 Entered by Laurie J Doheny
 Assign to Staff Doheny, Laurie (Current Primary)
 Activity Type Staff Assisted Job Search in Area

Change Activity/Staff

Hide Open Activity

*Start Date
 Estimated End Date
 *Funding Stream
 Activity Subtype
 Estimated Cost \$
 Estimated Hours
 User Defined Text 1
 User Defined Text 2
 User Defined Date

Show Comments

Show Case Note

Hide Close Activity

End Date Completion Results
 Actual Cost \$ Actual Hours

Save Save and Open New Activity Cancel

Items marked with a red asterisk* are required when adding Activities.

Start Date - enter the **Date** the participant began the activity

Funding Stream* - select the correct PY Funding Stream

*The **WF1 PY Funding Stream** should match where the Tuition or Support Service for the activity is being paid from on the **Fiscal Ledger**, if your agency is maintaining one.

The **Local Flag** activity is to be used for Funding Stream tracking of **Support Services** when there is not another appropriate activity to enroll under the correct Program's Funding Stream. Refer to the **WF1 Local Flag Activity User Guide** for details.

Click **Save** or

Click **Save and Open New Activity** to continue to open any other pertinent Activities for the person.

ADD ACTIVITY continued

All items with a red asterisk* in the **Employment Info** panel are required when adding employment related activities.

▼ Hide Employment Info

*Empr Name

Worksite

Empr Contact

Empr E-mail

Address1

Address2

City State Zip

County Country

Phone Ext. Phone Type If other, please specify: TTY Video

Job Title

*Hourly Wage \$

*Occupational Title (O*NET) -
*Clear O*NET code for new search.*

Employer Industry (NAICS) -
Clear NAICS code for new search.

A red asterisk indicates that the item is required for specific employment activities.

However, if other employment info is known, it should be entered for all employment activities.

ADD ACTIVITY continued

All items with a red asterisk* in the **School Info** panel, are required when adding training related activities.

Credentialed training funded through WIOA Adult must be WIOA certified in order to claim the associated credential for performance purposes. This is reflected by what is entered in the **WIA/WIOA Certification Status** field (if applicable).

Certification Pending is an acceptable selection for **WIA/WIOA Certification Status** until activity close, upon which time the user must indicate that the training program is either certified or not certified in order to close the activity. Credentials obtained from training programs that are not WIA/WIOA certified will not count toward the credential rate.

▼ Hide School Info

*School -
Clear School code for new search.

*School Location Select school to populate this field ▼

*Training Program (CIP) -
Clear CIP code for new search.

*Training Title (O*NET) -
Clear O*NET code for new search.

Training funded through the Workforce Investment Act (WIA) or the Workforce Innovation and Opportunity Act (WIOA) must be provided by a program or course that is WIOA certified in order to claim a credential.

Activity is Part of Career Pathway None Selected ▼

*WIA/WIOA Certification Status None Selected ▼

*Proposed Credential Type

<input type="checkbox"/> GED	<input type="checkbox"/> High School Diploma
<input type="checkbox"/> Occupational Skills Certificate	<input type="checkbox"/> Occupational Certification
<input type="checkbox"/> Technical/Occupational Skills License	<input type="checkbox"/> Certificate of Completion of an Apprenticeship
<input type="checkbox"/> AA or AS Degree	<input type="checkbox"/> BA or BS Degree
<input type="checkbox"/> Master's Degree	<input type="checkbox"/> Doctorate Degree
<input type="checkbox"/> Other Recognized Credential	

*Estimated Attainment Date

*Pell Grant Recipient None Selected ▼

▼ Hide Case Note

When adding a training activity: write the dates of training, name or type of program, and name of the school or training facility in the Case Note box. The Case Note will be auto-added to the Case Note section of WF1.

Refer to the **DW/Adult Training Policy** for detailed information on requirements for training activities

WIA/WIOA Certification Status* – **Select the appropriate item**

*Options are:

Certification Pending	Certified Outside of MN
Certified in MN	Not Certified

Entering the **Estimated End Date** will automatically add a pending **Credential** to the record

NOTE: Entering a Case Note when adding activities will auto-add the Case Note to the Case Note panel.

Click **Save**

CLOSE ACTIVITY

Activities should be closed when the person is no longer partaking in the Activity or the Funding Stream has changed for the specific activity.

To close an **Activity**, click on the **Activity** link found on the left navigation panel.

General

At-A-Glance
Contact
Tickler
Demographics
Work Preferences
MN Works Resume

Case Note

Add Case Note
Case Note Quick
Case Note Search

Cases

Program/New App
Eligibility/Enrollment
Activity
TAA
Plan
Credential

Activity Summary

Wizard O Oz Record ID 100000968
Birth Date 03/01/1974

▼ Hide Adult Seq 2 - Enrolled

Enrollment Date: 07/10/2019 Exit Date:

Activity: Subtype: Work Exp Type	Funding Stream	Start Date/End Date	Staff: Agency	Action
Staff Assist JS In	Ramsey WDA-15 PY18 WIOA Adult Formula	07/10/2019 Open	Laurie J Doheny WF Solutions	Edit Delete Copy
Indv Plan Dvpmnt	Ramsey WDA-15 PY18 WIOA Adult Formula	07/10/2019 Open	Laurie J Doheny WF Solutions	Edit Delete Copy
Career Counseling	Ramsey WDA-15 PY18 WIOA Adult Formula	07/10/2019 Open	Laurie J Doheny WF Solutions	Edit Delete Copy
Staff Assist Assess	Ramsey WDA-15 PY18 WIOA Adult Formula	07/10/2019 Open	Laurie J Doheny WF Solutions	Edit Delete Copy

Click [Edit](#) (found under the Action column) for the appropriate Activity

The panel shown below will appear.

Adult Activity

Wizard O Oz Record ID 100000968
Birth Date 03/01/1974

Program Seq 2
Agency: Location Ramsey County Workforce Solutions: North St. Paul
Enrollment Date 07/10/2019
Entered by Laurie J Doheny
Assign to Staff Doheny, Laurie (Current Primary Staff)
Activity Type Staff Assisted Job Search in Area

[Go to Close Activity Panel](#)

▼ Hide Open Activity

Start Date 07/10/2019
Estimated End Date

Click the [Go to Close Activity Panel](#)

The panel shown on the next page will appear.

CLOSE ACTIVITY continued

The items highlighted below are required when closing all **Activities**.

Some **Activities** may require additional information. If WF1 required fields are missing when saving, WF1 will issue an error message indicating what is required.

General

At-A-Glance
Contact
Tickler
Demographics
Work Preferences
MN Works Resume

Case Note

Add Case Note
Case Note Quick
Case Note Search

Cases

Program/New App
Eligibility/Enrollment

Activity

TAA
Plan
Credential
Reporting Collection
Youth Performance
Participation Hours
Exit
Follow-Up

Adult Activity

Wizard O Oz Record ID 10000968
Birth Date 03/01/1974

Program Seq 2
Agency: Location Ramsey County Workforce Solutions: North St. Paul
Enrollment Date 07/10/2019
Entered by Laurie J Doheny
Assign to Staff Doheny, Laurie (Current Primary Staff)
Activity Type Staff Assisted Job Search in Area

Expand Activity Panels

Show Open Activity
Show Comments
Show Case Note
Hide Close Activity

End Date
Actual Cost \$ **Completion Results**
Actual Hours

Save Save and Open New Activity Cancel

End Date - enter the appropriate **Date**

Actual Cost - Enter the dollar amount for the actual funding expenditures for the activity, if applicable

Completion Results* - select the appropriate **item**

*If the Activity is being closed due to a Funding Stream change and the Activity will be copied for continued funding, select **Successful**

Click **Save**

ACTIVITY DEFINITIONS

DEED provided the following **Activity definitions**.
The program(s) associated with the Activity is indicated.

Activity	Explanation & Relation to Performance	When to use it
Apprenticeship (DW & Adult)	Registered apprenticeships provide a unique combination of structured learning with on-the-job training from an assigned mentor. Related instruction, technical training or other certified training is provided by apprenticeship training centers, technical schools, community colleges, and/or institutions employing distance and computer-based learning approaches. Must be certified by the Minnesota Department of Labor. Relation to Performance: Credential, MSG. Also required: Apprenticeship contract	After IEP is captured in WF1; after contract w/ employer is completed and signed (employer, person, counselor). (local policy may be stricter)
Career Counseling (DW & Adult)	Facilitated exploration of occupational and industry information that will lead to a first, new, or better job. May include career planning, case management, individual or group mentoring performed by the counselor, and other one-on-one services to assist a person during program participation. N/A to Performance	When enrolling. Use for every person.
Classroom Training (DW & Adult)	An organized program or course of study that provides specific vocational skills that lead to proficiency in performing actual tasks and technical functions required by certain occupational fields at entry, intermediate, or advanced levels and results in an industry-recognized credential when successfully completed. Certificates awarded by Workforce Development Boards and work readiness certificates are not considered credentials because these types of certificates do not document the measurable technical or industry/occupational skills necessary to gain employment or advance within an occupation. Likewise, such certificates must recognize technology or industry/occupational skills for the specific industry/occupation. Relation to Performance: Credential, MSG Also required: class schedules, cost documentation from school	After IEP is captured in the system
CLIMB Consulting (Converting Layoffs to Minnesota Businesses) (State DW Only)	Services offered by organizations that help develop a business plan, market, find funding sources for their business capital, etc., e.g., Women Venture, SCORE, and Small Business Development Centers. Click here to read the policy. Use exit reason "Started Business/Self-employed." If closed as "successful," it will be removed from local area's performance and will be in statewide denominator only. If closed as "unsuccessful," it will be included in both performance counts. Supplemental Wage Information required in the follow-up tab during the 2 nd and 4 th quarters after exiting or the case will be a negative in the state's performance outcomes.	Must have a business plan in file used instead of the IEP. Must articulate person's goal of launching or growing a business. Use for State DW only.

ACTIVITY DEFINITIONS continued:

DEED provided the following **Activity definitions**.
The program(s) associated with the Activity is indicated.

Activity	Explanation & Relation to Performance	When to use it
CLIMB Training (State DW Only)	Training activities that pertain to that person's business needs and goal. IEP must include person's goal of launching or growing a business. Exit from WF1 with the exit reason "Started Business/Self-employed".	Must have a business plan in file prior to exiting with "successful"
Credential Attained w/out Training (DW & Adult)	Use when person training costs are funded through other sources with only end of training tests or licensing fees are paid by provider. (Training must be attended during the case management timeframe and end with an employer recognized credential.) Relation to Performance: Credential	After IEP is captured in the "Plan" tab of WF1
Customized Training (DW & Adult)	Training that is designed to meet the specific requirements of an employer (including a group of employers) that is conducted with a commitment by the employer to employ an individual upon successful completion of the training and for which the employer pays a significant portion of the cost of training according to several criteria. Relation to Performance: MSG NOTE: Must have an employer connected to use this activity	After IEP is captured in the "Plan" tab of WF1. Must have an employer connected to use this activity.
Employed, Pending Exit (DW & Adult)	This activity indicates that a participant has obtained a new job, but is not yet exited from the program because their last date of service has not yet reached 90 days. Refer to the WF1 User Guide - Employed, Pending Exit Activity .	When the person reports that he/she is working.
Engaged in Disaster Relief Services (WIOA DW Only)	Means person lost job due to a natural disaster and is receiving CORE services. N/A to Performance	Use only when person is accessing "DWG DISASTER" funding.
Entrepreneurial Training (DW & Adult)	Training to start one's own small business. Training must end with an employer recognized credential. Relation to Performance: MSG, Credential	After IEP is captured in the "Plan" tab of WF1
ESL Training (DW & Adult)	Provided training to increase spoken English skills if English is person's second language. N/A to Performance	When service is written in IEP and person is actively participating

ACTIVITY DEFINITIONS continued:

DEED provided the following **Activity definitions**.

The program(s) associated with the Activity is indicated.

Activity	Explanation & Relation to Performance	When to use it
Financial Literacy Training (DW & Adult)	Supporting the ability of person to create household budgets, initiate savings plans, and make informed financial decisions about education, retirement, home ownership, wealth building, or other savings goals; supporting the ability to manage spending, credit, and debt, including credit card debt, effectively; 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; Supporting the ability to understand, evaluate, and compare financial products, services, and opportunities; and Supporting activities that 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. N/A to Performance	When service is written in IEP and person is actively participating
GED Training (DW & Adult)	Training to obtain a General Equivalency Diploma (GED). Relation to Performance: MSG, Credential NOTE: If the person does not exit to employment, GED training will NOT be considered a training activity for performance. If the person does exit to employment, GED training WILL be considered a training activity for performance.	After IEP is captured in the "Plan" tab of WF1
Holding (DW & Adult)	The participant will be out of contact for more than 30 days (unexpectedly) Example: Has been institutionalized, a family member is very ill, the participant is injured. (3 months limit) N/A to Performance	
Incumbent Worker Credential Waiver (DW & Adult)	This activity means person is still employed and to prevent their layoff they require training. The training needed will not result in a credential. Once training is completed, they are exited from the program and remain employed in a secure position. Relation to Performance: MSG NOTE: Only for person w/ eligibility basis of incumbent worker	After IEP is captured in the "Plan" tab of WF1 Only for person w/ Eligibility basis of incumbent worker

ACTIVITY DEFINITIONS continued:

DEED provided the following **Activity definitions**.
The program(s) associated with the Activity is indicated.

Activity	Explanation & Relation to Performance	When to use it
Incumbent Worker Training (DW & Adult)	<p>This activity means person is still employed and to prevent their layoff they require training. The training needed will end in an employer recognized credential. Once training is completed, they are exited from the program and remain employed in a secure position.</p> <p>Relation to Performance: MSG, Credential NOTE: Only for persons w/ eligibility basis of incumbent worker</p>	<p>After IEP is captured in the "Plan" tab of WF1 Only for person w/ Eligibility basis of incumbent worker</p>
Individual Plan Development (DW & Adult)	<p>Developed jointly by person and employment counselor when determined appropriate for program participation. Ongoing strategy to identify employment goals, achievement objectives, and an appropriate combination of services for person to achieve the employment goals. Must be kept current to ensure all parties are accountable for their responsibilities. Training, support services, and individualized services cannot be incurred, obligated, or distributed until after person is enrolled AND employment counselor have signed and dated the IEP. (see policy for specifics) N/A to Performance</p>	<p>Open as soon as the IEP is being developed</p>
Job Club (DW Only)	<p>Prevocational or work readiness training provided by the program provider or a partner program at the CareerForce location or office. N/A to Performance</p>	<p>When service is written in IEP and person is actively participating.</p>
Local Flag (DW & Adult)	<p>NOTE: For Agency Use as directed by Workforce Solutions MIS Unit. Used for Funding Stream tracking of Support Services when there is <u>not</u> another appropriate activity to enroll under the correct Program's Funding Stream. Refer to the WF1 User Guide – Local Flag Activity. N/A to Performance</p>	<p>When a Support Service is provided and there is not an open Activity with the correct Funding Stream.</p>
Non-Credentialed Training (DW & Adult)	<p>An organized program or course of study that provides specific vocational skills that lead to proficiency in performing actual tasks and technical functions required by certain occupational fields at entry, intermediate, or advanced levels but does not result in an industry-recognized credential when successfully completed. Relation to Performance: MSG</p>	<p>After IEP is captured in the "Plan" tab of WF1</p>

ACTIVITY DEFINITIONS continued:

DEED provided the following **Activity definitions**.
The program(s) associated with the Activity is indicated.

Activity	Explanation & Relation to Performance	When to use it
OJT – Public or Private (DW & Adult)	Provides a person with the knowledge and skills necessary for the full performance of the job. An OJT provides knowledge or skills essential to the full and adequate performance of the job, provides reimbursement to the employer of up to a percentage of the wage rate of person for the extraordinary costs of providing the training and additional supervision related to the training; and is limited in duration as appropriate to the occupation for which person is being trained, taking into account the content of the training, the prior work experience of person, and the service strategy of person, as appropriate. For more information and requirements of an OJT, see DEED's Customized Training and On-the-Job Training (WIOA) Policy. Relation to Performance: MSG, Credential	After IEP is captured in the "Plan" tab of WF1
Partnering (DW & Adult)	If you feel this should be used, contact amy.carlson@state.mn.us to discuss the situation. N/A to Performance	After discussion with Amy Carlson.
Pending Exit, Other (DW & Adult)	This activity indicates that a participant is in holding and is not yet exited from the program because their last date of service has not yet reached 90 days. Close all activities when opening this activity. The start date of these activities should be the last date of service. After 90 days of no additional service the case is exited from the program. Once exited, the start date of these activities, the end date of these activities and the exit date should all be the same date. If the person returns for additional services after these activities are activated, the activity start dates need to be updated to the most current last date of service and the 90 day waiting period restarts. NOTE: The exit reason that should be used when entering exit details should be the exit reason that most closely matches the real reason the case is closing.	Use when exit is pending due to retirement, moving, refused to continue, etc. For any reason that will not fit in the Employed, Pending Exit activity.
Planned Extended Leave (DW & Adult)	The participant will be out of contact for more than 30 days (planned). Example: treatments, pregnancy, vacation. (3-month limit)	

ACTIVITY DEFINITIONS continued:

DEED provided the following **Activity definitions**.
The program(s) associated with the Activity is indicated.

Activity	Explanation & Relation to Performance	When to use it
Pre-Vocational Services (DW & Adult)	Short-term services including development of learning skills, communication skills, interviewing skills, punctuality, personal maintenance skills, and professional conduct services to prepare individuals for unsubsidized employment or training. In some instances, pre-apprenticeship programs may be considered as short-term pre-vocational services. Workshops covering topics such as resume writing, interviewing techniques, online job searches, LinkedIn, networking, career exploration or interest assessments are examples of pre-vocational services. Job Clubs and Career Fairs are also considered pre-vocational services. N/A to Performance	When service is written in IEP and person is actively participating
Staff Assisted Assessment (DW & Adult)	All person with less than a bachelor's degree must complete a math and reading assessment before being enrolled in training. In addition, ALL person must complete skills and interest assessments before being enrolled in training. N/A to Performance	As soon as the service is written in the IEP and person is actively participating in the service
Staff Assisted Job Placement (DW & Adult)	Recommending person to prospective employers (person consent needed) N/A to Performance	When service is written in IEP and person is actively participating
Staff Assisted Job Search in Area (DW & Adult)	Forwarding and informing person of relevant job postings related to their interested career/industry that are within a 35-mile commute from their residence. Includes providing information on in-demand industry sectors and occupations and information on non-traditional employment. N/A to Performance	When service is written in IEP and person is actively participating
Staff Assisted Job Search out of Area (DW & Adult)	Forwarding and informing person of relevant job postings related to their interested career/industry that are further than 35 miles from their residence. Includes providing information on in-demand industry sectors and occupations and information on non-traditional employment. N/A to Performance	When service is written in IEP and person is actively participating
Staff Assisted Relocation (DW Only)	Tracks the timeframe Support Services are needed to assist person to relocate for a job. N/A to Performance	When service is written in IEP and person is actively participating

ACTIVITY DEFINITIONS continued:

DEED provided the following **Activity definitions**.
The program(s) associated with the Activity is indicated.

Activity	Explanation & Relation to Performance	When to use it
Temporary Call-Back (DW Only)	Information not received at time of printing.	
Work Experience (DW & Adult)	An internship or work experience is a planned, structured learning experience that takes place in a workplace for a limited period of time. Internships and other work experience may be paid or unpaid, as appropriate and consistent with other laws, such as the Fair Labor Standards Act. An internship or other work experience may be arranged within the private for-profit sector, the non-profit sector, or the public sector. Labor standards apply in any work experience setting where an employee/employer relationship, as defined by the Fair Labor Standards Act , exists. N/A to Performance	When service is written in IEP and person is actively participating
Work Readiness Services (DW & Adult)	Activities, programs, or services designed to help an individual acquire a combination of basic academic skills, critical thinking skills, digital literacy skills, and self-management skills are considered work readiness services. These include services that build competencies in: Utilizing resources; Using information; working with others; understanding systems; Skills necessary for successful transition into and completion of postsecondary education or training, or employment; and other employability skills that increase an individual's preparation for the workforce N/A to Performance	When service is written in IEP and person is actively participating