WorkforceOne (WF1) User Manual

Office of Adult Career Pathways

Updated 9/12/2018
**Introduction**
The Minnesota Department of Employment & Economic Development (DEED) is committed to ensuring economic equity – the fair and equitable access to resources so that all Minnesotans can have meaningful employment at a family sustaining wage.

WorkforceOne (WF1) is the Management Information System (MIS) mandated to be used for adult workforce-related programs funded in whole or part by state funds (§116L.98). WF1 is used to collect and manage participants’ demographic data, case management activities (such as career counseling, job search activities, training, etc.), support services received, and progress toward program outcomes (such as certificates and credentials obtained).

This manual is to be utilized by organizations who receive grants overseen by the Office of Adult Career Pathways including:

- Pathways to Prosperity (P2P) Competitive Grant Program
- Southeast Asian Economic Relief (SEA) Competitive Grant Program
- Women in High-Wage, High-Demand, Nontraditional Jobs (WESA) Competitive Grant Program
- Support Services Competitive Grant Program
- Legislatively-named Direct Appropriation Grants

This manual italicizes *field names* and bolds **tabs**, **links**, and **buttons**. Carrots (>) indicate a drop down or sidebar menu option, such as **General > At-A-Glance**.

If you have questions about the contents of this manual, contact Claire.Nelligan@state.mn.us.

**Purpose**
The purpose of this manual is to provide technical guidance to organizations serving participants in the grant programs listed in the Introduction. This manual is not intended to provide policy guidance.

**Outcome Reporting**
The data collected in WorkforceOne (WF1) is used for reporting to the legislature and to the public via the Uniform Report Card. It is important that all program-related information be documented in WF1 in order to evaluate program outcomes accurately. The Report Card extracts information from enrollment fields, activities, credentials, exit reasons, and other fields in WF1 in order to compile data including, but not limited to:

- Demographics such as gender, race and ethnicity, immigration status, and limited English proficiency
- Barriers to employment such as homelessness, level of education, offender history
- Training type, length of enrollment, and completion status
- Wage progression, job placement in career field, and job retention
- Certificates and credentials obtained, and support services provided
- Exit date and reason
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Website Information

Staff completing data entry should have a WF1 account and basic training on logging in, searching for persons, enrolling new program participants, running reports, and other system features and functions. This manual does not take place of the recommendation to attend WF1 Training.
WorkforceOne (WF1) Production/Live website: www.mnworkforceone.com

WF1 Sandbox website: https://sandbox.mnworkforceone.com

The sandbox is a training environment with artificial data. Do not enter real participant data into the Sandbox.

**Obtaining Access**

1. From the WF1 Home Page, select the link to **Forms**.

2. Select **Access Form**.

3. Complete the initial required questions:
   a. I am requesting new (or revised) access to:
      i. Select **Manage a caseload or monitor cases (most common)**
      ii. Only select **Process user (staff) access to WF1 (security administrator)** if you have attended specialized in-person **Security Administrator** training.
   b. I work for Vocational Rehabilitation Services > **No**.
   c. I work for State Services for the Blind > **No**.
   d. Access Group:
      i. **I know the access group that I want to request.**
4. Complete the required fields related to COFFR/Agency combinations and access level. Required fields are marked with a red asterisk (*).
   a. I need access to:
      i. Select **Agency Level Data (most common)** if you are a case manager.
      ii. Select Contract or Federal Funding Recipient (COFFR) Level Data if you are a manager of an organization who has subcontracted organizations entering data under your COFFR’s program in WF1. This will allow the COFFR to pull data for the grant as a whole, inclusive of subcontractors’ data.
      iii. **State Level Data** access groups are only granted to State of Minnesota employees who are responsible for managing or monitoring program data.
   b. Agency (provider) > select your organization.
   c. COFFR > select the organization who was awarded the grant, who has a contract with DEED. This may be the same or different from the Agency.
   d. Access Group:
      i. Select **Case Management 2 – ETP** (Employment & Training Programs) if you will be completing data entry or managing a caseload.
      ii. Select **Agency System Mgmt 2 – ETP** if you are a manager who will need the privilege to edit data.
   e. Caseload
      i. Select **I manage a caseload** if you complete data entry or manage a caseload.
      ii. Select **I do not manage a caseload** if you do not need to enter or edit data. This will provide a “view only” access level.
   f. Job Duties
      i. Describe your job duties in the text field. Include which programs you will be working with, which for grants overseen by the Office of Adult Career Pathways, the program choice will be **Adult**
Career Pathways. After reviewing your entry on the form to ensure information is complete and accurate, select Next.

5. The form will generate. Do not print from your internet browser. Select the disc icon on the menu bar and select PDF.
6. A pop-up will appear on the bottom of your internet browser. Select **Open** or **Save**. If you select **Save**, you will need to open it from the file location in which it was saved in order to proceed to print.

7. Once you've opened the Adobe PDF document, select **File**, then **Print**. The rest of the form will need to be completed by hand.
   a. Mark the COFFR, Agency, and Program (**Adult Career Pathways**) that you will need access to.
   b. Both the user and the user’s manager must sign the security form.
8. Scan and email the form to *workforceone.deed@state.mn.us*

**Registering for Training**

If you have not yet been granted access to WorkforceOne (WF1), you may contact your DEED Program Staff Coordinator to register for training for you. If you do have access to WF1, you may register yourself following the instructions below.
1. From the top navigation menu, select **Resources > Staff Training**.

![Staff Training Image]

2. Session Status defaults to **Open**.
3. Session Dates From defaults to three months from the current date. Update the Session Date to one year out in order to produce more options for training dates.
4. **Run Search**.

![Search Image]

5. Select **Action > Register Me** for the appropriate session:
   a. **ETP** (Employment and Training Programs) **Case Management Training** is relevant for users accessing the Adult Career Pathways program.
   b. The **Reports and Advanced Search Training** will cover the execution of reports and exporting report data. This is recommended for anyone within your organization who will be responsible for monitoring progress and outcomes.
   c. **DO NOT** register for DHS Programs Case Management Training (WF1 Basics).
6. The registration is confirmed when you see the **Registration saved** notification under the top navigation menu.

![Registration Saved Image]
Resources

DEED Policy
Adult Career Pathways programs are required to follow Employment & Training Programs policies, found here.

Each program overseen by the Office of Adult Career Pathways has a customized monitoring guide, which provides additional policy and procedural guidance. Contact your DEED Program Coordinator for the monitoring guide specific to the program you are administering.

Each grant program has a contract which includes a work plan and budget. All staff providing services through grant funds should be familiar with the terms and conditions to ensure that services are allowable prior to being provided.

Career Guidance Tools
DEED’s Labor Market Information (LMI) Data Tools provides information on employment, unemployment, wages and occupations, regional and state comparisons, and more. The Career and Education Explorer can help find wages, occupations in demand, and educational opportunities.

O*NET OnLine provides detailed descriptions of the world of work for use by job seekers, workforce development professionals, and more. Occupations can be found by browsing industry groups, field of work, skills, etc.

DEED Program Contacts
Organizations are notified of their DEED Program Coordinator at grant issuance; however, assignments and staff may change over time. Please contact the Supervisor if you are unsure who to contact about a specific grant program.

<table>
<thead>
<tr>
<th>Name</th>
<th>Email</th>
<th>Phone</th>
</tr>
</thead>
<tbody>
<tr>
<td>Claire Nelligan, Supervisor</td>
<td><a href="mailto:Claire.Nelligan@state.mn.us">Claire.Nelligan@state.mn.us</a></td>
<td>651-259-7573</td>
</tr>
<tr>
<td>of the Office of Adult</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Career Pathways</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Kirk Crowshoe, Program</td>
<td><a href="mailto:Kirk.Crowshoe@state.mn.us">Kirk.Crowshoe@state.mn.us</a></td>
<td>651-259-7589</td>
</tr>
<tr>
<td>Coordinator</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Mimi Daniel, Program</td>
<td><a href="mailto:Mimi.Daniel@state.mn.us">Mimi.Daniel@state.mn.us</a></td>
<td>651-259-7581</td>
</tr>
<tr>
<td>Coordinator</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Taryn Galehdari, Program</td>
<td><a href="mailto:Taryn.Galehdari@state.mn.us">Taryn.Galehdari@state.mn.us</a></td>
<td>651-259-7540</td>
</tr>
<tr>
<td>Coordinator</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Person Record
Before a participant’s program enrollment data may be recorded, a Person Record must exist.

Person Search
A potential participant may have a WorkforceOne (WF1) Person Record from applying for or participating in another program managed within the system. You must search for an existing record before adding a new person.

1. Select Search > Person from the top navigation menu.
2. It is a best practice to complete two searches before adding a new record.
   a. Search by **Social Security Number (SSN)**. **Run Search**.

   ![Image of the search page]

   b. Search by **First and Last Name**. If there is a possibility that the record was entered with a nickname, search with both the nickname and the given name (example: Rebecca may have been entered as Rebecca, Becca, or Becky). You may also use an asterisk (*) as a wildcard to return participant records that contain a specified value. For example, if you entered John* in the Last Name, records retrieved would include last names such as Johnsen, Johnson, etc. If you entered Moh* in the First Name, all records beginning with Moh would be returned (Mohamed, Mohammed, etc.).
3. **Person Search** results display.
   a. If the search yielded results, you may select the hyperlinked name to bring you to their Person Record > Person At-A-Glance page.
i. Review participant information to determine if the existing record matches the participant you are working with. From the Person At-A-Glance page, select General > Contact and General > Demographics from the left navigation menu.

![Person At-A-Glance page screenshot]

ii. If the record is not the correct person, return to Person Search and Add New Person Record if necessary.

iii. If the record is the correct person, review Person At-A-Glance for open program sequences. The program is open if there is an Enrollment Date, but no Exit Date.

<table>
<thead>
<tr>
<th>Program</th>
<th>Status</th>
<th>Application Date</th>
<th>Enroll Date</th>
<th>Exit Date</th>
<th>Closed from App Date</th>
<th>Last Follow-up Date</th>
<th>COFFR</th>
</tr>
</thead>
<tbody>
<tr>
<td>SNAP ET Seq 1</td>
<td>Enrolled</td>
<td>04/23/2018</td>
<td>04/23/2018</td>
<td></td>
<td></td>
<td></td>
<td>Henn/Carver (9)</td>
</tr>
<tr>
<td>Equity Support Services Adult SFY17 Seq 2</td>
<td>Exited</td>
<td>10/27/2017</td>
<td>01/16/2018</td>
<td>03/31/2018</td>
<td></td>
<td></td>
<td>Henn/Carver (9)</td>
</tr>
<tr>
<td>Adult Seq 1</td>
<td>Enrolled</td>
<td>08/15/2017</td>
<td>08/15/2017</td>
<td></td>
<td></td>
<td></td>
<td>Henn/Carver (9)</td>
</tr>
<tr>
<td>ACP Grant Type Grantee Name SFY19 Seq 1</td>
<td>Eligible, Not Enrolled</td>
<td>08/09/2017</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Henn/Carver (9)</td>
</tr>
<tr>
<td>ACP Seq 1</td>
<td>Eligible, Not Enrolled</td>
<td>09/23/2014</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Dakota/Scott (14)</td>
</tr>
</tbody>
</table>

1. Organizations are responsible for coordinating services, though not duplicating services for participants. If a participant is enrolled in another program in WF1, coordinate with the other organization/program to ensure the participant goals align, but are not duplicative. View other organizations’ contact information by navigating from Cases > Case Assignment.
b. If the **Person Search** resulted in zero matches, proceed to **Add New Person Record**.

**Add New Person Record**

If a thorough **Person Search** did not result in any matches, you will need to enter a new person into WorkforceOne (WF1).

1. The **Add New Person** option displays after the **Person Search** did not return any matches; therefore, you must always begin the process with a search. Select **Add New Person**.
2. On the **Person Add** page, complete all required fields, which are marked with a red asterisk (*) and listed below:
   a. **Last Name**
   b. **First Name**
   c. **Address1**
   d. **City**
   e. **State**
   f. **Zip**
   g. **County**
   h. **Country**
   i. **Veteran Status.** Options include:
      i. Active Service Ill or Wounded
      ii. Did Not Self-Identify
      iii. Not a Veteran
      iv. Spouse or Family Caregiver of Veteran
      v. Transitioning Service Member
      vi. Veteran
      vii. Veteran, < 180 Days of Active Service
   j. **Citizen/Right to Work.** Options include:
      i. Citizen
      ii. No
      iii. Right to Work

3. **Save**

4. The **Contact Information** page displays. A notification under the top navigation menu will display **Add Person Saved** if the save was successful.
Application

There are three steps to enrolling a participant into Adult Career Pathways: Application, Eligibility, and Enrollment. Adding a new application is the first step.


2. Select Add New Application.

3. Complete the required fields, which are marked with a red asterisk (*):
   a. Program: Adult Career Pathways
   b. Application date: the date the participant signed an application requesting services.
   c. Location: if your organization has multiple locations, select your location from the dropdown.
   d. Select either Primary Staff or Support Staff from the dropdown.

4. Continue to Eligibility or Save and Exit Wizard.
   a. Selecting Continue to Eligibility will proceed to the second stop of enrollment: Eligibility.
b. Selecting **Save and Exit Wizard** will save the application data, leaving the program in an **Eligible, Not Enrolled** (or pending) status.

![Image of workforce one interface](image)

- i. If you select **Save and Exit Wizard**, the **Eligibility/Enrollment Summary** page displays.
- ii. A notification under the top navigation menu will display **Application saved** if the save was successful.
- iii. Navigate back to this page to complete the enrollment at a later time by selecting **Cases > Eligibility/Enrollment** from the left navigation menu.

![Image of application saved notification](image)

- iv. Select **Complete Enrollment**, then proceed to **Eligibility**.
Eligibility

There are three steps to enrolling a participant into Adult Career Pathways: Application, Eligibility, and Enrollment. Eligibility is the second step.

1. On the Adult Career Pathways Eligibility page, complete all required fields, which are marked with a red asterisk (*) and listed below:
   a. **Decision Date:** the date the determination of eligibility was made. The date prepopulates to the Application Date, but may be modified if necessary. The Decision Date may not be a date earlier than the Application Date.
   b. **SSN:** Social Security Number. This will prepopulate if the General > Demographics page lists the SSN. **NOTE:** Organizations must maintain SSN verification for all enrolled participants.
   c. **Birth Date:** Month/Day/Year that the participant was born. This will prepopulate if the General > Demographics page lists the SSN. **NOTE:** Organizations must maintain Date of Birth verification for all enrolled participants.
   d. **Citizen/Right to Work.** Options include:
      i. **Citizen**
      ii. **No**
      iii. **Right to Work**
         1. **NOTE:** Organizations must maintain Right to Work verification for all enrolled participants.
   e. **Now Enrolled in Secondary Ed.** Indicate whether the participant is enrolled in secondary education as of the Decision Date. Options include:
      i. **Yes.** Additional questions will become required:
         1. **Is P2P and Requires Additional Education Services?** Answer **Yes** or **No** to indicate whether the participant is being enrolled into the Pathways to Prosperity (P2P) Competitive Grant Program and whether or not they require additional education services beyond what they are receiving in secondary education.
         2. **Is Not P2P, but Requires Additional Educational/Support Services?** Answer **Yes** or **No** to indicate whether the participant is being enrolled into an Adult Career Pathways grant other than Pathways to Prosperity (P2P), such as Support Services, Women in
2. Select **Determine Results**.

   a. If **Determination Results** are **Ineligible**, you have the option to **Save and Exit Wizard** or **Cancel**.
      i. If you select **Save and Exit Wizard**, the **Eligibility/Enrollment Summary** page displays, which shows the program as denied. A notification under the top menu will display **Eligibility Saved** if the save was successful.
b. If *Determination Results* are **Eligible**, you may *Save and Continue to Enrollment* or *Save and Exit Wizard*.

i. If you select *Save and Exit Wizard*, the *Eligibility/Enrollment Summary* page displays, which shows the program as **Eligible, not Enrolled**. To navigate back to this page to complete the enrollment at a later time, select *Cases > Eligibility/Enrollment* from the left navigation menu.
ii. Selecting **Save and Continue to Enrollment**, then proceed to **Enrollment**.

### Enrollment

There are three steps to enrolling a participant into Adult Career Pathways: Application, Eligibility, and Enrollment. Enrollment is the final step.

1. On the **Adult Career Pathways Enrollment** page, complete all required fields, which are marked with a red asterisk (*) and listed below:
   a. **Enrollment Date**: the date the participant first accessed services for the specified grant Funding Stream. The date prepopulates to the Decision Date, but may be modified if necessary. The Enrollment Date may not be a date earlier than the Application Date or Decision Date.
   b. **Primary Staff** prepopulates from what was entered on the **Application** page.
   c. **Last Name, First Name, Birth Date, Address, City, State, Zip, County, and Country** prepopulate from the Person’s **General > Contact** and **General > Demographics** pages.
   d. **Phone** is an optional field.
e. **Gender.** Options include:
   i. Female
   ii. Male
   iii. Did Not Self-Identify

f. **Ethnicity – Hispanic or Latino.** Options include:
   i. Did Not Self-Identify
   ii. Person is Hispanic or Latino
   iii. Person is Not Hispanic or Latino

g. **Race.** Options include:
   i. American Indian or Alaska Native
   ii. Black or African American
   iii. Hawaiian Native/Pacific Islander
   iv. Asian
   v. Did Not Self-Identify
   vi. White

h. Optional fields include:
   i. Immigrant or Refugee
   ii. Country of Origin
   iii. Limited English Proficiency
   iv. Primary Language
v. Immigration Status.

i. Selective Service Registration will be required if Gender was entered as Male. Options include:
   i. Not Applicable
   ii. Not Registered
      1. Select the link to Register for Selective Service if the individual is male and under the age of 26.
   iii. Registered
      1. Selective Service Number becomes a required field when Registered is selected.
      2. Select the link to Selective Service Number Look Up to find the participant’s registration number.
         (NOTE: the policy on Selective Service Registration may be found here).

j. Veteran Status. Options include:
   i. Did Not Self-Identify
   ii. Not a Veteran
   iii. Spouse or Family Caregiver of a Veteran
   iv. Transitioning Service Member
   v. Veteran
   vi. Veteran, < 180 Days of Active Service
      (NOTE: Organizations must maintain verification of Veteran status; for example, a copy of a DD-214).

k. Optional fields include Pregnant/Parenting Youth and Runaway Youth. Youth is defined as an individual under the age of 22.

l. Family Status. Select the participant’s household information including who they live with, if applicable, and their relationship to others in the household. Options include:
   i. Not a Family Member: participant living alone or living with individuals who are not family.
ii. **Other Family Member**: participant residing with family members other than their own children. For example, an adult child living with their parent.

iii. **Parent in One-Parent Family**: participant who has sole custodial responsibility for one or more dependent children.

iv. **Parent in Two-Parent Family**: participant who shares parental responsibility with another individual living in the same household.

m. **Actual Family Size**: Enter the number of persons related by blood, marriage, or adoption, who are living in a single residence and whose income must be counted for program eligibility.

n. **Dependents Under 18 Years**: Enter the number of dependents living with the participant who are under the age of 18. Total dependents must be less than **Actual Family Size**.

o. **Annual Family Income**: Enter the total annualized income for all household members included in **Actual Family Size**.

p. **Highest Level of Education**: Options include:

   i. **No Education Grades Completed**
   
   ii. Separate choices for **1st through 12-th Grades** (no diploma earned). NOTE: 12th Grade is not the same as a High School Diploma or GED.
   
   iii. Separate choices for **one, two, or three years of College/Technical/Vocational School**
   
   iv. **Attained Associate’s Diploma or Degree**
   
   v. **Attained Certificate of Attendance/Completion**
   
   vi. **Attained Other Post-Secondary Degree or Certification**
   
   vii. **Postsecondary Certificate/License (non-degree)**
   
   viii. **Bachelor’s Degree or Equivalent**
   
   ix. **Education Beyond a Bachelor’s Degree**

q. **English Reading Skills Grade Level**: The grade level equivalent in English reading at which the person is functioning as determined by a generally accepted standardized test or a comparable score on a criterion-referenced test (administered within the last 12 months) or a school record of reading skills level (determined within the last 12 months). Values are stated in one-decimal increments up to and including 13.0. If the person has a four-year college degree or higher, or refuses to be tested, enter 88.0. If the participant has not tested and their reading level is obviously below the 9.0 grade level, enter 87.0.

r. **Math Skills Grade Level**: The grade level equivalent in mathematics at which the person is functioning as determined by a generally accepted standardized test or a comparable score on a criterion-referenced test (administered within the last 12 months) or a school record of math skills level (determined within the last 12 months). Values are stated in one-decimal increments up to and including 13.0. If the person has a four-year college degree or higher, or refuses to be tested, enter 88.0. If the participant has not tested and their math level is obviously below the 9.0 grade level, enter 87.0.

s. **Financial Aid Status**: Options include:
i. None
ii. Scholarship
iii. Student Grant (Pell, Alliss, etc.)
iv. Student Loan
v. Work Study

*Highest Level of Education

*English Reading Skills Grade Level

*Math Skills Grade Level

*Financial Aid Status

*SSI Recipient: Select Yes if the participant receives benefits from a State Plan approved under the Social Security Act, Title XVI (Supplemental Security Income).

u. SSDI Recipient: Select Yes if the participant receives Social Security Disability Insurance benefits.

v. TANF/MFIP Recipient: Select Yes if the participant receives benefits from Temporary Assistance for Needy Families (TANF)/Minnesota Family Investment Program (MFIP).

w. SNAP Recipient: Select Yes if the participant receives Supplemental Nutrition Assistance Program (SNAP) benefits through a county human services agency.

Note: SNAP was formally referred to as Food Stamps or Food Support.

x. Diversionary Work Recipient: Select Yes if the participant receives state-funded cash assistance through the Diversionary Work Program.

y. General Assistance Recipient: Select Yes if the participant receives General Assistance (GA) from a county human services agency.

z. Refugee Assistance Recipient: Select Yes if the participant receives Refugee Cash Assistance (RCA) benefits through a county human services agency or community-based organization.

aa. At or Below 200% Federal Poverty Guidelines: Select Yes if the participant is at or below 200% of the Federal Poverty Guideline. Poverty guidelines are updated on the U.S. Department of Health & Human Services website each January.

bb. Disability Status. This field refers to a self-reported physical, mental, or learning disability, emotional/behavioral disorder, or substance abuse that has an impact on employability. Options include:

   i. Did Not Self-Identify
   ii. Not Disabled
   iii. Yes, Disability is Employment Barrier
   iv. Yes, Disability is Not Barrier to Employment

cc. Homeless. This field indicates whether or not the person lacks a fixed, regular and adequate nighttime residence, or has a primary nighttime residence that is 1) a supervised publicly or privately operated
shelter designed to provide a temporary living accommodation (including welfare hotels, congregate shelter, and transitional housing for the mentally ill); or 2) an institution that provides a temporary residence for individuals intended to be institutionalized; or 3) a public or private place not designed for or ordinarily used as a regular sleeping accommodation for human beings. The term Homeless does not include any individual imprisoned or otherwise detained pursuant to an Act of Congress or a state law. Answer Yes or No.

dd. **Offender**. This field indicates whether or not the person is an adult or juvenile who is or has been subject to any stage of the criminal justice process. Answer Yes or No.

<table>
<thead>
<tr>
<th><em>Disability Status</em></th>
<th>None Selected</th>
</tr>
</thead>
<tbody>
<tr>
<td><em>Homeless</em></td>
<td>None Selected</td>
</tr>
<tr>
<td><em>Offender</em></td>
<td>None Selected</td>
</tr>
</tbody>
</table>

**Labor Force Status**. Options include:

i. **Employed Full-Time**: individual who is working 30 hours or more per week.

ii. **Employed Part-Time**: individual who is working less than 30 hours per week.

iii. **Employed, Rec Term Notice/Military Sep**: individual who is employed, but has received a notice of termination of employment from their employer, or an individual who is a transitioning service member.

iv. **Not Employed, Was Not Self-Employed**: individual who was unemployed as of the Enrollment Date.

v. **Not Employment, Was Self-Employed, Farm**: individual who was unemployed as of the Enrollment Date, but who was a self-employed farmer.

vi. **Not Employed, Was Self-Employed, Non-Farm**: individual who was unemployed as of the Enrollment Date, but was self-employed in an occupation other than farming.

vii. **Not in Labor Force**: individual with no employment history.

**UI Benefit Status**. Options include:

i. **Exempt from Work Search**

ii. **Exhaustee**. Select for a participant who was receiving Unemployment Insurance (UI), but the benefits have been exhausted, so they are no longer eligible to receive payments.

iii. **Neither Claimant nor Exhaustee**. Select for a participant who is not eligible for, has not exhausted, and is not receiving UI benefits.

iv. **Claimant Not Referred by RESEA or WPRS**. Select for a participant who has not been referred to UI by Department of Labor (DOL) programs including Reemployment Services & Eligibility Assessment (RESEA) or Work Profiling and Reemployment Services (WPRS).

v. **Claimant Referred by RESEA**. Select for a participant receiving UI benefits, who was referred by the DOL program: RESEA.

vi. **Claimant Referred by WPRS**. Select for a participant receiving UI benefits, who was referred by the DOL program: WPRSs

**Lack of Significant Work History**.
hh. *Hourly Wage of Last Job.* Enter the person’s latest hourly wage within the past 26 weeks. Enter "0" if the person was unemployed the entire 26 weeks.

![Lack of Significant Work History](None Selected)  
![Hourly Wage of Last Job](None Selected)

ii. *Prev Occupation Title (O*NET).* Select **Search/Validate O*NET** to look up the occupation description closest to the participant’s most recent job within the past 26 weeks. This field may remain blank if the participant has been unemployed for the last 26 weeks.

![Prev Occupation Title (O*NET)](Clear O*NET code for new search)

jj. *Consent to Share with Partners.* Select **Yes** if the participant has given consent to share with partnering providers/subcontracted organizations such as Adult Basic Education or other school, a county human services agency, etc.

kk. *Effective Date.* Enter the date the participant signed the *Consent to Share with Partners,* if applicable.

![Consent to Share with Partners](None Selected)

**Open Initial Activity**

While the participant may be engaged in several activities, you must open the first activity within the **Adult Career Pathways Enrollment** page. Please see Activity Definitions for a description of the selections.

II. *Activity Type.* Options include:
   i. Staff-Assisted Assessment  
   ii. Orientation  
   iii. Individual Plan Development  
   iv. Career Counseling

mm. *Funding Stream.* Select the appropriate funding stream as directed by your organization’s **DEED Program Coordinator.**

nn. *Case Note.* Enter details of the participant’s application, eligibility, enrollment, activities, employment plan, etc.

oo. Select the next option:
   i. **Enroll.** This will save the enrollment and initial activity, and display the **Eligibility/Enrollment Summary.**
Enroll and Add Another Activity. This will save the enrollment and initial activity, then display the Adult Career Pathways Activity page.

Save Without Enrolling. This will save the enrollment and initial activity data, but will not complete the enrollment. The program will be left in Eligible, Not Enrolled (or pending) status. Selecting this option will display the Eligibility/Enrollment Summary page.
Activities

WorkforceOne (WF1) Activities are used to record services in which the participant is engaged in as a means of accomplishing program goals. As Activities are used to monitor compliance with the grant program contract and expected outcomes, it is important to capture all programmatic aspects of the individual’s participation.

Please note: activities provided must be pre-approved within the organizations’ negotiated contracted work plan with the Minnesota Department of Employment and Economic Development (DEED).

Required Activities

1. Required Activities for all ACP program sequences include:
   a. Assessment
   b. Career Counseling
   c. Individual Plan Development

Minnesota Jobs Skills Partnership (MJSP) Funding Stream Restrictions on Activities:

MJSP funds are braided with select Pathways to Prosperity (P2P) Competitive Grant program contracts. MJSP funds are restricted to training funds only. You may not associate an activity which is unrelated to training with an MJSP funding stream. Activity options for MJSP funding streams include:
d. **Adult Diploma Program**
e. **Apprenticeship**
f. **Basic Skills Instruction**
g. **Bridge Programs**
h. **Credentialed Coursework/Training**
i. **ESL/ELL Training**
j. **Financial Literacy Education**
k. **GED Test Preparation**
l. **Non-credentialed Training**
m. **OJT – Public or Private**
n. **Work Readiness Skills Training**

**Activity Type Definitions**
The table below defines the options when entering *Activities* into the Adult Career Pathways (ACP) program in WF1.

<table>
<thead>
<tr>
<th>Activity</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>Adult Diploma Program (ADP)</td>
<td>Minnesota’s Adult Basic Education (ABE) high school diploma program is a standard competency-based diploma that is issued by the MN Department of Education for adults that complete an approved ABE program. Do not use this activity for GED Test Preparation programs.</td>
</tr>
<tr>
<td>Apprenticeship</td>
<td>A combination of on-the-job training (OJT) and related instruction in which workers learn the practical and theoretical aspects of a skilled occupation. Apprenticeships are different from OJT in that the employer pays 100% of the participant’s wages.</td>
</tr>
<tr>
<td>Assessment</td>
<td>An evaluation of the person’s capabilities, interests, needs, and vocational potential.</td>
</tr>
<tr>
<td>Basic Skills Instruction</td>
<td>This activity is to be used for participants accessing Adult Basic Education (ABE) services which are not a part of a specific program such as Adult Diploma, GED Test Preparation, or ESL/ELL.</td>
</tr>
<tr>
<td>Bridge Programs</td>
<td>Bridge programs prepare adults with limited academic or limited English skills to enter and succeed in credit-bearing postsecondary education and training leading to career-path employment in high-demand, middle- and high-skilled occupations. The goal of bridge programs is to sequentially bridge the gap between the initial skills of individuals and what they need to enter and succeed in postsecondary education and career-path employment.</td>
</tr>
<tr>
<td>Career Counseling</td>
<td>Case management services provided to participants to address the barriers and progress toward educational and employment goals.</td>
</tr>
<tr>
<td>Credentialed Coursework/Training</td>
<td>Enrolled in courses offered by accredited training institutions, private trade schools, and academic facilities. Training recorded under this activity must lead to an industry-recognized or postsecondary credential(s) (certificates, diplomas, degrees).</td>
</tr>
<tr>
<td>Employed Full-Time</td>
<td>Regular employment of 30 hours or more per week.</td>
</tr>
<tr>
<td>Employed Part-Time</td>
<td>Regular employment of less than 30 hours per week.</td>
</tr>
<tr>
<td>Activity</td>
<td>Definition</td>
</tr>
<tr>
<td>----------------------------------</td>
<td>------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>ESL/ELL Training</td>
<td>Instruction to English as a Second Language (ESL)/English Language Learner (ELL) participants whose native language is not English.</td>
</tr>
<tr>
<td>Financial Literacy Education</td>
<td>Education to develop skills for making informed decisions about personal finances.</td>
</tr>
<tr>
<td>GED Test Preparation</td>
<td>This activity provides instructions to participants to equip them with the skills necessary to successfully pass the General Education Diploma (GED) test.</td>
</tr>
<tr>
<td>Holding</td>
<td>This is a placeholder to keep the program sequence open, but temporarily places a participant in “suspension.” Holding is commonly used to allow some time to pass before anticipated entry into another activity. This activity should only be used for up to 90 days.</td>
</tr>
<tr>
<td>Individual Plan Development</td>
<td>This activity is to be used when the service provider and participant jointly create their Individual Employment Plan (IEP), which outlines the responsibilities of both the participant and the service provider as the participant prepares to achieve the program goal of full-time, long-term, unsubsidized employment at the most realistic and highest possible wage. This activity is to remain open until the participant has exited the program.</td>
</tr>
<tr>
<td>Independent Job Search</td>
<td>This activity requires participants to make a pre-determined number of inquiries to prospective employers over a specified period of time. This may include telephone or walk-in contacts, completion of applications, or interviews. This component is designed so that the participant conducts his/her job search independently or individually within a group setting.</td>
</tr>
<tr>
<td>Local Flag</td>
<td>The Local Flag activity is defined within each local agency for use at each own location’s preference. This activity is not used to pull state-wide data.</td>
</tr>
<tr>
<td>Non-credentialed Training</td>
<td>This activity includes instruction which does not lead to a recognized credential, but is designed to improve the employability and post-secondary preparation of the participant. Examples include digital literacy, Driver’s License instruction, customer service training, ServSafe, etc.</td>
</tr>
<tr>
<td>OJT – Public or Private</td>
<td>A work placement made through a contract with an employer or registered apprenticeship program sponsor in the public, private non-profit, or private sector. An OJT contract must be limited to the period of time required for a participant to become proficient in the occupation for which the training is being provided. The OJT Service Provider provides the Employer with a partial wage reimbursement, typically up to 50 percent of the wage rate of the participant for the extraordinary costs of providing the training and supervision related to the training.</td>
</tr>
<tr>
<td>Orientation</td>
<td>Orientation may be delivered via a group setting, or may be part of an individual counseling session. The orientation includes information on program benefits and opportunities available, rights and responsibilities for participating, etc.</td>
</tr>
<tr>
<td>Paid Work Experience</td>
<td>This activity is used when a participant is in a temporary paid employment experience in the public, private nonprofit, or private sector.</td>
</tr>
<tr>
<td>Retention</td>
<td>This activity is used to keep the program sequence open after they have gained employment in order to provide continued support in the first 90 days. This could</td>
</tr>
<tr>
<td>Activity</td>
<td>Definition</td>
</tr>
<tr>
<td>-------------------------------</td>
<td>---------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Self-Employment Training</td>
<td>Activity that improves the employability of participants by providing training in setting up and operating a small business or other self-employment venture.</td>
</tr>
<tr>
<td>Staff-Assisted Job Placement</td>
<td>Referral to programs for job openings, job seeking and job development.</td>
</tr>
<tr>
<td>Staff-Assisted Job Search in Area</td>
<td>Staff-assisted job search and interview preparation for job(s) within a 50-mile radius.</td>
</tr>
<tr>
<td>Staff-Assisted Job Search out of Area</td>
<td>Staff-assisted job search and interview preparation for job(s) outside a 50-mile radius.</td>
</tr>
<tr>
<td>Uncompensated Work Experience</td>
<td>This activity is used when a participant is in a temporary unpaid employment experience in the public, private nonprofit, or private sector.</td>
</tr>
<tr>
<td>Work Readiness Skills Training</td>
<td>Instruction in job-seeking techniques including, but not limited to, soft skills such as professionalism or communication and teamwork, online job search tools, resume writing, mock interviews, job skills assessments, job search clubs, or other direct training or support activities.</td>
</tr>
</tbody>
</table>

**Entering Activities**

One Activity was opened during the enrollment process (either Assessment, Career Counseling, Individual Plan Development, or Orientation). You will need to enter additional activities to record the participant’s involvement in additional services as per the Required Activities section of this guide, while keeping in mind MJSP Funding Restrictions.

1. From with Person At-A-Glance page, select Cases > Activities.
2. The Activity that was opened within the Enrollment will display.

3. Select Add ACP Activity within the Adult Career Pathways – Enrolled sequence.

4. Select an Activity Type from the dropdown choices to describe services being provided. See Activity Type Definitions, then select Next.
Adult Diploma Program

Minnesota’s Adult Basic Education (ABE) high school diploma program is a standard competency-based diploma that is issued by the MN Department of Education for adults that complete an approved ABE program. Do not use this activity for GED Test Preparation programs.

1. From Cases > Activities > Add ACP Activity within the Adult Career Pathways Enrolled sequence.

2. Select Adult Diploma Program (ADP) from the dropdown options, then Next.
3. In the **Open Activity** section, enter the required fields (*):
   a. **Start Date**: the date the participant began the ADP.
   b. **Funding Stream**: select the appropriate grant funding stream which is supporting the selected activity.

4. If known, enter the optional fields:
   a. **Estimated End Date**: the date the participant is anticipated to receive their diploma.
   b. **Activity Subtype**
   c. **Estimated Cost**: If activity will be charged to the specified *Funding Stream*, enter the estimated cost.
   d. **Estimated Hours**: Enter the hours that the participant is expected to be engaged in this activity from the *Start Date* through *Estimated End Date*.
   e. **User Defined Text** fields may be entered per each organization’s discretion. Text entered here may be used by organizations to pull specific data through **Search > Advanced Search**.

5. Enter required (*) information on the **School Info** panel:
   a. **School**: Select **Search/Validate School**.

6. In the **School Code Search**, enter the name or code number of a school, then **Run Search**.
7. If the correct school displays, select the hyperlink to have the code prepopulate into the *School* field on the activity.
   a. If the correct school does not display with the criteria you used (such as the school name), try the **School Code Search** again with another criteria (such as “community” or “college”).
   
   ![School Code Search](image)

   b. *If the school is not listed, you may enter the code as 8888888 (seven 8s).*

8. Select a *School Location* from the dropdown options.

9. *Training Program:* Select **Search/Validate CIP**.

   ![Training Program](image)

10. In the **CIP Code Search**, enter General Education, then **Run Search**.
11. Select the hyperlink to code **53.0201; High School Equivalency Certificate Program.**

12. **Training Title (O*NET):** Select **Search/Validate O*NET** to find the code associated to the participant’s short- or long-term employment goals as outlined in their Individual Employment Plan.

a. In **O*NET Code Search**, enter a keyword or code number in the search, then Run Search.

13. If the appropriate O*NET code displays, select the hyperlink. If the correct O*NET code does not display, return to **O*NET Code Search.**

15. Enter **Comments** and a **Case Note** if desired.
   a. The case note date will be the *Activity Start Date*.

16. Do not enter information into the **Close Activity** panel at this time. This section will be completed when the activity is closed. Select from the following options: **Save**, **Save an Open New Activity**, or **Cancel**.
a. **Save.** The Activity Summary will display.

b. **Save and Open New Activity.** The Adult Career Pathways Activity page will display. Return to Entering Activities.
Apprenticeship
A combination of On-the-Job Training (OJT) and related instruction in which workers learn the practical and theoretical aspects of a skilled occupation. Apprenticeships are different from OJT in that the employer pays 100% of the participant’s wages.

1. From **Cases > Activities > Add ACP Activity** within the **Adult Career Pathways Enrolled** sequence.

2. Select **Apprenticeship** from the dropdown options, then **Next**.
3. In the **Open Activity** section, enter the required fields (*):
   a. **Start Date**: the date the participant began the ADP.
   b. **Funding Stream**: select the appropriate grant funding stream which is supporting the selected activity.

4. If known, enter the optional fields:
   a. **Estimated End Date**: the date the participant is anticipated to receive their diploma.
   b. **Activity Subtype**
   c. **Estimated Cost**: If activity will be charged to the specified *Funding Stream*, enter the estimated cost.
   d. **Estimated Hours**: Enter the hours that the participant is expected to be engaged in this activity from the **Start Date** through **Estimated End Date**.
   e. **User Defined Text** fields may be entered per each organization’s discretion. Text entered here may be used by organizations to pull specific data through **Search > Advanced Search**.

5. Enter required (*) fields in the **Employment Info** panel.

   a. **Employer Name**
   b. **Hourly Wage**
   c. **Occupational Title (O*NET)**: Select **Search/Validate O*NET** to find the code associated to the participant’s apprenticeship program.

   d. **In O*NET Code Search**, enter a keyword or code number in the search, then **Run Search**.
e. If the appropriate O*NET code displays, select the hyperlink. If the correct O*NET code does not display, return to O*NET Code Search.

6. Enter **Comments** and a **Case Note** if desired.
   a. The case note date will be the **Activity Start Date**.

17. Do not enter information into the **Close Activity** panel at this time. This section will be completed when the activity is closed. Select from the following options: **Save**, **Save an Open New Activity**, or **Cancel**.
a. **Save.** The **Activity Summary** will display.

![Activity Summary](image)

b. **Save and Open New Activity.** The **Adult Career Pathways Activity** page will display. Return to **Entering Activities.**

![Adult Career Pathways Activity](image)
c. **Cancel.**
   i. Information entered into this Activity will be canceled and not saved. The **Activity Summary** page will display.

![Activity Summary Image](image1)

**Assessment**

An evaluation of a participant's capabilities, interests, needs, and vocational potential. **NOTE** This is a required Activity for Adult Career Pathways (ACP) programs.

1. From **Cases > Activities > Add ACP Activity** within the **Adult Career Pathways Enrolled** sequence.

![Add ACP Activity Image](image2)

7. Select **Assessment** from the dropdown options, then **Next**.
8. In the **Open Activity** section, enter the required fields (*):
   a. *Start Date*: the date the participant began the ADP.
   b. *Funding Stream*: select the appropriate grant funding stream which is supporting the selected activity.

9. If known, enter the optional fields:
   a. *Estimated End Date*: the date the participant is anticipated to receive their diploma.
   b. *Activity Subtype*
   c. *Estimated Cost*: If activity will be charged to the specified *Funding Stream*, enter the estimated cost.
   d. *Estimated Hours*: Enter the hours that the participant is expected to be engaged in this activity from the *Start Date* through *Estimated End Date*.
   e. *User Defined Text* fields may be entered per each organization’s discretion. Text entered here may be used by organizations to pull specific data through Search > Advanced Search.

10. Enter **Comments** and a **Case Note** if desired.
    a. The case note date will be the *Activity Start Date*. 
11. Do not enter information into the **Close Activity** panel at this time. This section will be completed when the activity is closed. Select from the following options: **Save**, **Save an Open New Activity**, or **Cancel**.

a. **Save.** The **Activity Summary** will display.

b. **Save and Open New Activity.** The **Adult Career Pathways Activity** page will display. Return to **Entering Activities**.
Basic Skills Instruction
This activity is to be used for participants accessing Adult Basic Education (ABE) services which are not part of a specific program such as Adult Diploma Program, GED Test Preparation, or ESL/ELL Training.

1. From Cases > Activities > Add ACP Activity within the Adult Career Pathways Enrolled sequence.
2. Select **Basic Skills Instruction** from the dropdown options, then **Next**.

3. In the **Open Activity** section, enter the required fields (*):
   a. **Start Date**: the date the participant began the ADP.
   b. **Funding Stream**: select the appropriate grant funding stream which is supporting the selected activity.

4. If known, enter the optional fields:
   a. **Estimated End Date**: the date the participant is anticipated to receive their diploma.
   b. **Activity Subtype**
   c. **Estimated Cost**: If activity will be charged to the specified Funding Stream, enter the estimated cost.
   d. **Estimated Hours**: Enter the hours that the participant is expected to be engaged in this activity from the Start Date through Estimated End Date.
   e. **User Defined Text** fields may be entered per each organization’s discretion. Text entered here may be used by organizations to pull specific data through **Search > Advanced Search**.
5. If known and applicable, enter optional information on the School Info panel:
   a. School: Select Search/Validate School.

6. In the School Code Search, enter the name or code number of a school, then Run Search.

7. If the correct school displays, select the hyperlink to have the code prepopulate into the School field on the activity.
   a. If the correct school does not display with the criteria you used (such as the school name), try the School Code Search again with another criteria (such as “community” or “college”).

   b. If the school is not listed, you may enter the code as 8888888 (seven 8s).
8. Select a *School Location* from the dropdown options.

![School Location](image1)

9. *Training Program:* Select *Search/Validate CIP.*

![Training Program (CIP)](image2)

10. In the **CIP Code Search**, enter Basic Skills, then *Run Search.*

![CIP Code Search](image3)

11. Select the hyperlink to code **32.0101: Basic Skills and Developmental/Remedial Education, General.**

![CIP Code Search](image4)

12. *Training Title (O*NET):* Select *Search/Validate O*NET* to find the code associated to the participant’s short- or long-term employment goals as outlined in their *Individual Employment Plan.*

![Training Title (O*NET)](image5)

a. In **O*NET Code** Search, enter a *keyword or code number* in the search, then *Run Search.*

![Search/Validate O*NET](image6)
13. If the appropriate O*NET code displays, select the hyperlink. If the correct O*NET code does not display, return to O*NET Code Search.

![O*NET Code Search](image)

14. Enter Comments and a Case Note if desired.
   a. The case note date will be the Activity Start Date.

![Hide Comments](image)

![Hide Case Note](image)

15. Do not enter information into the Close Activity panel at this time. This section will be completed when the activity is closed. Select from the following options: Save, Save an Open New Activity, or Cancel.
a. **Save.** The **Activity Summary** will display.

![Activity Summary]

b. **Save and Open New Activity.** The **Adult Career Pathways Activity** page will display. Return to **Entering Activities.**

![Adult Career Pathways Activity]
c. Cancel.
   i. Information entered into this Activity will be canceled and not saved. The Activity Summary page will display.

Bridge Programs
Bridge programs prepare adults with limited academic or limited English skills to enter and succeed in credit-bearing postsecondary education and training leading to career-path employment in high-demand, middle- and high-skilled occupations. The goal of bridge programs is to sequentially bridge the gap between the initial skills of individuals and what they need to enter and succeed in postsecondary education and career-path employment.

1. From Cases > Activities > Add ACP Activity within the Adult Career Pathways Enrolled sequence.

2. Select Bridge Programs from the dropdown options, then Next.
3. In the **Open Activity** section, enter the required fields (*):
   
a. **Start Date**: the date the participant began the ADP.

   b. **Funding Stream**: select the appropriate grant funding stream which is supporting the selected activity.

4. If known, enter the optional fields:
   
a. **Estimated End Date**: the date the participant is anticipated to receive their diploma.

   b. **Activity Subtype**

   c. **Estimated Cost**: If activity will be charged to the specified **Funding Stream**, enter the estimated cost.

   d. **Estimated Hours**: Enter the hours that the participant is expected to be engaged in this activity from the **Start Date** through **Estimated End Date**.

   e. **User Defined Text** fields may be entered per each organization’s discretion. Text entered here may be used by organizations to pull specific data through **Search > Advanced Search**.

5. Enter required (*) information on the **School Info** panel:
   
a. **School**: Select **Search/Validate School**.

6. In the **School Code Search**, enter the name or code number of a school, then **Run Search**.
7. If the correct school displays, select the hyperlink to have the code prepopulate into the *School* field on the activity.
   
   a. If the correct school does not display with the criteria you used (such as the school name), try the **School Code Search** again with another criteria (such as “community” or “college”).

   ![School Code Search](image)

   **School Code Search**
   
   *Search for keyword or code number:*

   Wildcard indicator (*) is not needed for keyword search.

   Example: Entering a partial word such as Nurs will return results including nurse, nurses and nursing.

   ![School Code Search Table](image)

   ![School Code Search Table](image)

   ![School Code Search Table](image)

   ![School Code Search Table](image)

   ![School Code Search Table](image)

   c. If the school is not listed, you may enter the code as **8888888** (seven 8s).

8. Select a *School Location* from the dropdown options.

9. **Training Program:** Select **Search/Validate CIP**.

16. In the **CIP Code Search**, enter Basic Skills, then **Run Search**.
10. Training Title (O*NET): Select Search/Validate O*NET to find the code associated to the participant’s short- or long-term employment goals as outlined in their Individual Employment Plan.

   *Training Title (O*NET)

   Clear O*NET code for new search.

   Search/Validate O*NET

   a. In O*NET Code Search, enter a keyword or code number in the search, then Run Search.

11. If the appropriate O*NET code displays, select the hyperlink. If the correct O*NET code does not display, return to O*NET Code Search.

17. Select the hyperlink to code **32.0101: Basic Skills and Developmental/Remedial Education, General.**
12. Enter **Comments** and a **Case Note** if desired.

   a. The case note date will be the *Activity Start Date*.

13. Do not enter information into the **Close Activity** panel at this time. This section will be completed when the activity is closed. Select from the following options: **Save**, **Save an Open New Activity**, or **Cancel**.

   a. **Save**. The **Activity Summary** will display.
b. **Save and Open New Activity.** The **Adult Career Pathways Activity** page will display. Return to **Entering Activities**.

c. **Cancel.**

   i. Information entered into this Activity will be canceled and not saved. The **Activity Summary** page will display.
Career Counseling
Case management services provided to participants to address the barriers and progress toward educational and employment goals.

1. From Cases > Activities > Add ACP Activity within the Adult Career Pathways Enrolled sequence.

2. Select Career Counseling from the dropdown options, then Next.

3. In the Open Activity section, enter the required fields (*):
   a. Start Date: the date the participant began the ADP.
   b. Funding Stream: select the appropriate grant funding stream which is supporting the selected activity.

4. If known, enter the optional fields:
   a. Estimated End Date: the date the participant is anticipated to receive their diploma.
   b. Activity Subtype
   c. Estimated Cost: If activity will be charged to the specified Funding Stream, enter the estimated cost.
   d. Estimated Hours: Enter the hours that the participant is expected to be engaged in this activity from the Start Date through Estimated End Date.
   e. User Defined Text fields may be entered per each organization’s discretion. Text entered here may be used by organizations to pull specific data through Search > Advanced Search.
5. Enter **Comments** and a **Case Note** if desired.
   
a. The case note date will be the *Activity Start Date*.

18. Do not enter information into the **Close Activity** panel at this time. This section will be completed when the activity is closed. Select from the following options: **Save**, **Save an Open New Activity**, or **Cancel**.

   a. **Save**. The **Activity Summary** will display.
b. **Save and Open New Activity.** The **Adult Career Pathways Activity** page will display. Return to **Entering Activities.**

c. **Cancel.**

   i. Information entered into this Activity will be canceled and not saved. The **Activity Summary** page will display.

---

**Credentialed Coursework/Training**

Enrolled in courses offered by accredited training institutions, private trade schools, and academic facilities. Training recorded under this activity must lead to an industry-recognized or postsecondary credential(s) (certificates, diplomas, degrees).
1. From **Cases > Activities > Add ACP Activity** within the **Adult Career Pathways Enrolled** sequence.

![Image of Workforce One interface]

2. Select **Credentialed Coursework/Training** from the dropdown options, then **Next**.

![Image of Adult Career Pathways Activity]

3. In the **Open Activity** section, enter the required fields (*):
   a. **Start Date**: the date the participant began the ADP.
   b. **Funding Stream**: select the appropriate grant funding stream which is supporting the selected activity.

4. If known, enter the optional fields:
   a. **Estimated End Date**: the date the participant is anticipated to receive their diploma.
   b. **Activity Subtype**
   c. **Estimated Cost**: If activity will be charged to the specified Funding Stream, enter the estimated cost.
   d. **Estimated Hours**: Enter the hours that the participant is expected to be engaged in this activity from the **Start Date** through **Estimated End Date**.
   e. **User Defined Text** fields may be entered per each organization’s discretion. Text entered here may be used by organizations to pull specific data through **Search > Advanced Search**.

6. Enter **Comments** and a **Case Note** if desired.
   b. The case note date will be the **Activity Start Date**.
7. Do not enter information into the Close Activity panel at this time. This section will be completed when the activity is closed. Select from the following options: Save, Save an Open New Activity, or Cancel.

d. Save. The Activity Summary will display.

e. Save and Open New Activity. The Adult Career Pathways Activity page will display. Return to Entering Activities.
f. **Cancel.**

i. Information entered into this Activity will be canceled and not saved. The **Activity Summary** page will display.

**Employed Full-Time**

Regular employment of 30 hours or more per week.

1. From **Cases > Activities > Add ACP Activity** within the **Adult Career Pathways Enrolled** sequence.
2. Select **Employed Full-Time** from the dropdown options, then **Next**.

**Adult Career Pathways Activity**

![Image showing the activity summary](image.png)

3. In the **Open Activity** section, enter the required fields (*):
   a. **Start Date**: the date the participant began the ADP.
   b. **Funding Stream**: select the appropriate grant funding stream which is supporting the selected activity.

4. If known, enter the optional fields:
   a. **Estimated End Date**: the date the participant is anticipated to receive their diploma.
   b. **Activity Subtype**
   c. **Estimated Cost**: If activity will be charged to the specified Funding Stream, enter the estimated cost.
   d. **Estimated Hours**: Enter the hours that the participant is expected to be engaged in this activity from the Start Date through Estimated End Date.
   e. **User Defined Text** fields may be entered per each organization’s discretion. Text entered here may be used by organizations to pull specific data through **Search > Advanced Search**.

5. Enter required (*) fields in the **Employment Info** panel.
a. Employer Name
b. Hourly Wage
c. Occupational Title (O*NET): Select Search/Validate O*NET to find the code associated to the participant’s employment:

d. In O*NET Code Search, enter a keyword or code number in the search, then Run Search.

e. If the appropriate O*NET code displays, select the hyperlink. If the correct O*NET code does not display, return to O*NET Code Search.
6. Enter optional employment information, if known:
   a. **Worksite, Address, City, Zip, County, Country, Job Title, Hours per Week, Employment Type, and Employer Industry (NAICS):**

   ![Employment Info](image)

5. Enter **Comments** and a **Case Note** if desired.
   b. The case note date will be the **Activity Start Date.**
19. Do not enter information into the **Close Activity** panel at this time. This section will be completed when the activity is closed. Select from the following options: **Save**, **Save an Open New Activity**, or **Cancel**.

a. **Save**. The **Activity Summary** will display.

b. **Save and Open New Activity**. The **Adult Career Pathways Activity** page will display. Return to **Entering Activities**.
c. **Cancel.**
   
i. Information entered into this Activity will be canceled and not saved. The **Activity Summary** page will display.

### Employed Part-Time

Regular employment of less than 30 hours per week.

1. From **Cases > Activities > Add ACP Activity** within the **Adult Career Pathways Enrolled** sequence.
2. Select Employed Part-Time from the dropdown options, then Next.

**Adult Career Pathways Activity**

3. In the Open Activity section, enter the required fields (*):
   a. Start Date: the date the participant began the ADP.
   b. Funding Stream: select the appropriate grant funding stream which is supporting the selected activity.

4. If known, enter the optional fields:
   a. Estimated End Date: the date the participant is anticipated to receive their diploma.
   b. Activity Subtype
   c. Estimated Cost: If activity will be charged to the specified Funding Stream, enter the estimated cost.
   d. Estimated Hours: Enter the hours that the participant is expected to be engaged in this activity from the Start Date through Estimated End Date.
   e. User Defined Text fields may be entered per each organization’s discretion. Text entered here may be used by organizations to pull specific data through Search > Advanced Search.

5. Enter required (*) fields in the Employment Info panel.
a. Employer Name  

b. Hourly Wage

c. Occupational Title (O*NET): Select **Search/Validate O*NET** to find the code associated to the participant’s employment:

d. In **O*NET Code Search**, enter a keyword or code number in the search, then **Run Search**.

e. If the appropriate O*NET code displays, select the hyperlink. If the correct O*NET code does not display, return to **O*NET Code Search**.
6. Enter optional employment information, if known:
   a. Worksite, Address, City, Zip, County, Country, Job Title, Hours per Week, Employment Type, and Employer Industry (NAICS):

7. Enter Comments and a Case Note if desired.
   c. The case note date will be the Activity Start Date.
20. Do not enter information into the **Close Activity** panel at this time. This section will be completed when the activity is closed. Select from the following options: **Save**, **Save an Open New Activity**, or **Cancel**.

a. **Save**. The **Activity Summary** will display.

b. **Save and Open New Activity**. The **Adult Career Pathways Activity** page will display. Return to **Entering Activities**.
c. **Cancel.**
   
   i. Information entered into this Activity will be canceled and not saved. The **Activity Summary** page will display.

---

**ESL/ELL Training**

Instruction to English as a Second Language (ESL)/English Language Learner (ELL) participants whose native language is not English.

1. From **Cases > Activities > Add ACP Activity** within the **Adult Career Pathways Enrolled** sequence.
2. Select **English as a Second Language (ESL)/English Language Learner (ELL) Training** from the dropdown options, then **Next**.

3. In the **Open Activity** section, enter the required fields (*):  
   a. **Start Date**: the date the participant began the ADP.  
   b. **Funding Stream**: select the appropriate grant funding stream which is supporting the selected activity.  

4. If known, enter the optional fields:  
   a. **Estimated End Date**: the date the participant is anticipated to receive their diploma.  
   b. **Activity Subtype**  
   c. **Estimated Cost**: If activity will be charged to the specified **Funding Stream**, enter the estimated cost.  
   d. **Estimated Hours**: Enter the hours that the participant is expected to be engaged in this activity from the **Start Date** through **Estimated End Date**.  
   e. **User Defined Text fields** may be entered per each organization’s discretion. Text entered here may be used by organizations to pull specific data through **Search > Advanced Search**.
5. Enter required (*) information on the School Info panel:
   a. School: Select Search/Validate School.

6. In the School Code Search, enter the name or code number of a school, then Run Search.

7. If the correct school displays, select the hyperlink to have the code prepopulate into the School field on the activity.
   a. If the correct school does not display with the criteria you used (such as the school name), try the School Code Search again with another criteria (such as “community” or “college”).
If the school is not listed, you may enter the code as 8888888 (seven 8s).

8. Select a School Location from the dropdown options.

9. Training Program: Select Search/Validate CIP.

10. In the CIP Code Search, enter Second Language, then Run Search.

11. Select the hyperlink to code 32.0109.

12. Training Title (O*NET): Select Search/Validate O*NET to find the code associated to the participant’s short- or long-term employment goals as outlined in their Individual Employment Plan.

   a. In O*NET Code Search, enter a keyword or code number in the search, then Run Search.
13. If the appropriate O*NET code displays, select the hyperlink. If the correct O*NET code does not display, return to O*NET Code Search.

14. Enter Comments and a Case Note if desired.
   a. The case note date will be the Activity Start Date.

15. Do not enter information into the Close Activity panel at this time. This section will be completed when the activity is closed. Select from the following options: Save, Save an Open New Activity, or Cancel.
a. **Save**. The *Activity Summary* will display.

b. **Save and Open New Activity**. The *Adult Career Pathways Activity* page will display. Return to *Entering Activities*. 
c. **Cancel.**
   
i. Information entered into this Activity will be canceled and not saved. The **Activity Summary** page will display.

### Financial Literacy Education

Education to develop skills for making informed decisions about personal finances.

1. From **Cases > Activities > Add ACP Activity** within the **Adult Career Pathways Enrolled** sequence.
2. Select **Financial Literacy Education** from the dropdown options, then **Next**.

### Adult Career Pathways Activity

**Becca Johnson**  
**Birth Date 07/13/1989**  

<table>
<thead>
<tr>
<th>Program Seq</th>
<th>1</th>
</tr>
</thead>
<tbody>
<tr>
<td>Agency: Location</td>
<td></td>
</tr>
<tr>
<td>Enrollment Date</td>
<td>04/26/2018</td>
</tr>
<tr>
<td>Entered by</td>
<td>Becca L. Johnson</td>
</tr>
<tr>
<td><strong>Assign to Staff</strong></td>
<td>Johnson, Becca (Current Primary)</td>
</tr>
<tr>
<td><strong>Activity Type</strong></td>
<td>Financial Literacy Education</td>
</tr>
</tbody>
</table>

3. In the **Open Activity** section, enter the required fields (*):
   a. **Start Date**: the date the participant began the ADP.
   b. **Funding Stream**: select the appropriate grant funding stream which is supporting the selected activity.

4. If known, enter the optional fields:
   a. **Estimated End Date**: the date the participant is anticipated to receive their diploma.
   b. **Activity Subtype**
   c. **Estimated Cost**: If activity will be charged to the specified **Funding Stream**, enter the estimated cost.
   d. **Estimated Hours**: Enter the hours that the participant is expected to be engaged in this activity from the **Start Date** through **Estimated End Date**.
   e. **User Defined Text** fields may be entered per each organization’s discretion. Text entered here may be used by organizations to pull specific data through **Search > Advanced Search**.
5. If known and applicable, enter optional information on the **School Info** panel:

   - **School**: Select **Search/Validate School**.

6. In the **School Code Search**, enter the name or code number of a school, then **Run Search**.

7. If the correct school displays, select the hyperlink to have the code prepopulate into the **School** field on the activity.

   - If the correct school does not display with the criteria you used (such as the school name), try the **School Code Search** again with another criteria (such as “community” or “college”).

   - If the school is not listed, you may enter the code as **8888888** (seven 8s).
8. Select a *School Location* from the dropdown options.

   ![School Location dropdown]

9. *Training Program*: Select **Search/Validate CIP**.

   ![Training Program dropdown]

10. In the **CIP Code Search**, enter Developmental/Remedial, then **Run Search**.

   ![CIP Code Search interface]

11. Select the hyperlink to code **32.0199: Basic Skills and Developmental/Remedial Education, Other**.

   ![CIP Code Search results]

12. *Training Title (O*NET)*: Select **Search/Validate O*NET** to find the code associated to the participant’s short- or long-term employment goals as outlined in their **Individual Employment Plan**.

   ![Training Title (O*NET) dropdown]

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a. In O*NET Code Search, enter a *keyword or code number* in the search, then Run Search.

13. If the appropriate O*NET code displays, select the hyperlink. If the correct O*NET code does not display, return to O*NET Code Search.

14. Enter Comments and a Case Note if desired.
   a. The case note date will be the Activity Start Date.

15. Do not enter information into the Close Activity panel at this time. This section will be completed when the activity is closed. Select from the following options: Save, Save an Open New Activity, or Cancel.
a. **Save.** The *Activity Summary* will display.

b. **Save and Open New Activity.** The *Adult Career Pathways Activity* page will display. Return to *Entering Activities.*

c. **Cancel.**
GED Test Preparation
This activity provides instructions to participants to equip them with the skills necessary to successfully pass the General Education Diploma (GED) test.

1. From **Cases > Activities > Add ACP Activity** within the **Adult Career Pathways Enrolled** sequence.

2. Select **GED Test Preparation** from the dropdown options, then **Next**.
3. In the Open Activity section, enter the required fields (*):
   a. Start Date: the date the participant began the ADP.
   b. Funding Stream: select the appropriate grant funding stream which is supporting the selected activity.

4. If known, enter the optional fields:
   a. Estimated End Date: the date the participant is anticipated to receive their diploma.
   b. Activity Subtype
   c. Estimated Cost: If activity will be charged to the specified Funding Stream, enter the estimated cost.
   d. Estimated Hours: Enter the hours that the participant is expected to be engaged in this activity from the Start Date through Estimated End Date.
   e. User Defined Text fields may be entered per each organization’s discretion. Text entered here may be used by organizations to pull specific data through Search > Advanced Search.

5. Enter required (*) information on the School Info panel:
   a. School: Select Search/Validate School.

6. In the School Code Search, enter the name or code number of a school, then Run Search.
7. If the correct school displays, select the hyperlink to have the code prepopulate into the School field on the activity.
   a. If the correct school does not display with the criteria you used (such as the school name), try the School Code Search again with another criteria (such as “community” or “college”).

   e. If the school is not listed, you may enter the code as 8888888 (seven 8s).

8. Select a School Location from the dropdown options.

9. Training Program: Select Search/Validate CIP.

10. In the CIP Code Search, enter General Education, then Run Search.

12. Training Title (O*NET): Select Search/Validate O*NET to find the code associated to the participant’s short- or long-term employment goals as outlined in their Individual Employment Plan.

   *Training Title (O*NET)*

   - Clear O*NET code for new search.
   - Search/Validate O*NET

   a. In O*NET Code Search, enter a keyword or code number in the search, then Run Search.

13. If the appropriate O*NET code displays, select the hyperlink. If the correct O*NET code does not display, return to O*NET Code Search.

14. Enter Comments and a Case Note if desired.
   
   a. The case note date will be the Activity Start Date.
15. Do not enter information into the Close Activity panel at this time. This section will be completed when the activity is closed. Select from the following options: **Save**, **Save an Open New Activity**, or **Cancel**.

a. **Save**. The Activity Summary will display.

b. **Save and Open New Activity**. The Adult Career Pathways Activity page will display. Return to Entering Activities.
c. **Cancel.**
   
i. Information entered into this Activity will be canceled and not saved. The **Activity Summary** page will display.

### Holding

This is a placeholder to keep the program sequence open, but temporarily places a participant in “suspension.” Holding is commonly used to allow some time to pass before anticipated entry into another activity. This activity should only be used for up to 90 days.

1. From **Cases > Activities > Add ACP Activity** within the **Adult Career Pathways Enrolled** sequence.
2. Select **Holding** from the dropdown options, then **Next**.

Adult Career Pathways Activity

Becca Johnson  
Birth Date 07/13/1989  
Record ID 202013257  
MAXIS Case 22335

- **Activity Type**: Holding

3. In the **Open Activity** section, enter the required fields (*):
   
a. **Start Date**: the date the participant began the ADP.
   
b. **Funding Stream**: select the appropriate grant funding stream which is supporting the selected activity.

4. If known, enter the optional fields:
   
a. **Estimated End Date**: the date the participant is anticipated to receive their diploma.
   
b. **Activity Subtype**
c.  *Estimated Cost:* If activity will be charged to the specified *Funding Stream,* enter the estimated cost.

d.  *Estimated Hours:* Enter the hours that the participant is expected to be engaged in this activity from the *Start Date* through *Estimated End Date.*

e.  *User Defined Text* fields may be entered per each organization’s discretion. Text entered here may be used by organizations to pull specific data through *Search > Advanced Search.*

5.  Enter *Comments* and a *Case Note* if desired.
   
   a.  The case note date will be the *Activity Start Date.*

6.  Do not enter information into the *Close Activity* panel at this time. This section will be completed when the activity is closed. Select from the following options: *Save, Save an Open New Activity,* or *Cancel.*

   a.  *Save.* The *Activity Summary* will display.
b. **Save and Open New Activity.** The *Adult Career Pathways Activity* page will display. Return to *Entering Activities.*

c. **Cancel.**
   
i. Information entered into this Activity will be canceled and not saved. The *Activity Summary* page will display.
Independent Job Search

This activity requires participants to make a pre-determined number of inquiries to prospective employers over a specified period of time. This may include telephone or walk-in contacts, completion of applications, or interviews. This component is designed so that the participant conducts his/her job search independently or individually within a group setting.

1. From **Cases > Activities > Add ACP Activity** within the **Adult Career Pathways Enrolled** sequence.

2. Select **Independent Job Search** from the dropdown options, then **Next**.
3. In the **Open Activity** section, enter the required fields (*):  
   a. **Start Date**: the date the participant began the ADP.  
   b. **Funding Stream**: select the appropriate grant funding stream which is supporting the selected activity.

4. If known, enter the optional fields:  
   a. **Estimated End Date**: the date the participant is anticipated to receive their diploma.  
   b. **Activity Subtype**  
   c. **Estimated Cost**: If activity will be charged to the specified Funding Stream, enter the estimated cost.  
   d. **Estimated Hours**: Enter the hours that the participant is expected to be engaged in this activity from the **Start Date** through **Estimated End Date**.  
   e. **User Defined Text** fields may be entered per each organization’s discretion. Text entered here may be used by organizations to pull specific data through **Search > Advanced Search**.

5. Enter **Comments** and a **Case Note** if desired.  
   a. The case note date will be the **Activity Start Date**.
6. Do not enter information into the Close Activity panel at this time. This section will be completed when the activity is closed. Select from the following options: Save, Save an Open New Activity, or Cancel.

a. Save. The Activity Summary will display.

b. Save and Open New Activity. The Adult Career Pathways Activity page will display. Return to Entering Activities.
c.  **Cancel.**  
   i.  Information entered into this Activity will be canceled and not saved. The **Activity Summary** page will display.

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**Individual Plan Development**

This activity is to be used when the service provider and participant jointly create their Individual Employment Plan (IEP), which outlines the responsibilities of both the participant and the service provider as the participant prepares to achieve the program goal of full-time, long-term, unsubsidized employment at the most realistic and highest possible wage. This activity is to remain open until the participant has exited the program.

7.  From **Cases > Activities > Add ACP Activity** within the **Adult Career Pathways Enrolled** sequence.
8. Select Individual Plan Development from the dropdown options, then Next.

9. In the Open Activity section, enter the required fields (*):
   a. Start Date: the date the participant began the ADP.
   b. Funding Stream: select the appropriate grant funding stream which is supporting the selected activity.

10. If known, enter the optional fields:
    a. Estimated End Date: the date the participant is anticipated to receive their diploma.
    b. Activity Subtype
c. **Estimated Cost:** If activity will be charged to the specified **Funding Stream**, enter the estimated cost.

d. **Estimated Hours:** Enter the hours that the participant is expected to be engaged in this activity from the **Start Date** through **Estimated End Date**.

e. **User Defined Text** fields may be entered per each organization’s discretion. Text entered here may be used by organizations to pull specific data through **Search > Advanced Search**.

11. Enter **Comments** and a **Case Note** if desired.
   a. The case note date will be the **Activity Start Date**.

12. Do not enter information into the **Close Activity** panel at this time. This section will be completed when the activity is closed. Select from the following options: **Save**, **Save an Open New Activity**, or **Cancel**.

   a. **Save.** The **Activity Summary** will display.
b. **Save and Open New Activity.** The **Adult Career Pathways Activity** page will display. Return to [Entering Activities](#).

c. **Cancel.**
   i. Information entered into this Activity will be canceled and not saved. The **Activity Summary** page will display.
Local Flag

The Local Flag activity is defined within each local agency for use at each own location’s preference. This activity is not used to pull state-wide data.

1. From **Cases > Activities > Add ACP Activity** within the **Adult Career Pathways Enrolled** sequence.

2. Select **Local Flag** from the dropdown options, then **Next**.
3. In the **Open Activity** section, enter the required fields (*):
   a. **Start Date**: the date the participant began the ADP.
   b. **Funding Stream**: select the appropriate grant funding stream which is supporting the selected activity.

4. If known, enter the optional fields:
   a. **Estimated End Date**: the date the participant is anticipated to receive their diploma.
   b. **Activity Subtype**
   c. **Estimated Cost**: If activity will be charged to the specified Funding Stream, enter the estimated cost.
   d. **Estimated Hours**: Enter the hours that the participant is expected to be engaged in this activity from the Start Date through Estimated End Date.
   e. **User Defined Text** fields may be entered per each organization’s discretion. Text entered here may be used by organizations to pull specific data through **Search > Advanced Search**.

5. Enter optional fields in the **Employment Info** panel:
   a. **Employer Name**
   b. **Worksite**
   c. **Address 1 and Address 2**
   d. **City, State, ZIP**
   e. **County**
   f. **Country**
   g. **Job Title**
   h. **Hourly Wage**
   i. **Hours per Week**
j. Employment Type

k. Occupational Title (O*NET): Select Search/Validate O*NET to find the code associated to the participant’s employment:

l. In O*NET Code Search, enter a keyword or code number in the search, then Run Search.

m. If the appropriate O*NET code displays, select the hyperlink. If the correct O*NET code does not display, return to O*NET Code Search.

n. Employer Industry (NAICS)
6. Enter optional fields on the **School Info** panel:
   a. **School**: Select **Search/Validate School**.

7. In the **School Code Search**, enter the name or code number of a school, then **Run Search**.

8. If the correct school displays, select the hyperlink to have the code prepopulate into the **School** field on the activity.
a. If the correct school does not display with the criteria you used (such as the school name), try the **School Code Search** again with another criteria (such as “community” or “college”).

![School Code Search](image)

f. If the school is not listed, you may enter the code as 8888888 (seven 8s).

9. Select a **School Location** from the dropdown options.

![Select School Location](image)

10. **Training Program**: Select **Search/Validate CIP**.

![Training Program Search/Validate CIP](image)

11. In the **CIP Code Search**, enter training criteria, if applicable, then **Run Search**.

![CIP Code Search](image)

12. **Training Title (O*NET)**: Select **Search/Validate O*NET** to find the code associated to the participant’s short- or long-term employment goals as outlined in their Individual Employment Plan.

![Training Title O*NET Search/Validate](image)

a. In **O*NET Code Search**, enter a *keyword or code number* in the search, then **Run Search**.
13. If the appropriate O*NET code displays, select the hyperlink. If the correct O*NET code does not display, return to O*NET Code Search.

14. Enter Comments and a Case Note if desired.
   a. The case note date will be the Activity Start Date.

15. Enter information into the Close Activity panel, if applicable. Then, select from the following options: Save, Save an Open New Activity, or Cancel.
a. **Save.** The **Activity Summary** will display.

b. **Save and Open New Activity.** The **Adult Career Pathways Activity** page will display. Return to **Entering Activities.**
c. **Cancel.**
   
i. Information entered into this Activity will be canceled and not saved. The **Activity Summary** page will display.

**Non-credentialed Training**

This activity includes instruction which does not lead to a recognized credential, but is designed to improve the employability and post-secondary preparation of the participant. Examples include digital literacy, Driver’s License instruction, customer service training, ServSafe, etc.

1. From **Cases > Activities > Add ACP Activity** within the **Adult Career Pathways Enrolled** sequence.

2. Select **Non-credentialed Training** from the dropdown options, then **Next**.
3. In the **Open Activity** section, enter the required fields (*):
   a. **Start Date**: the date the participant began the ADP.
   b. **Funding Stream**: select the appropriate grant funding stream which is supporting the selected activity.

4. If known, enter the optional fields:
   a. **Estimated End Date**: the date the participant is anticipated to receive their diploma.
   b. **Activity Subtype**
   c. **Estimated Cost**: If activity will be charged to the specified Funding Stream, enter the estimated cost.
   d. **Estimated Hours**: Enter the hours that the participant is expected to be engaged in this activity from the Start Date through Estimated End Date.
   e. **User Defined Text** fields may be entered per each organization’s discretion. Text entered here may be used by organizations to pull specific data through **Search > Advanced Search**.

5. If known and applicable, enter optional information on the **School Info** panel:
   a. **School**: Select **Search/Validate School**.

6. In the **School Code Search**, enter the name or code number of a school, then **Run Search**.
7. If the correct school displays, select the hyperlink to have the code prepopulate into the School field on the activity.
   a. If the correct school does not display with the criteria you used (such as the school name), try the **School Code Search** again with another criteria (such as “community” or “college”).

   b. If the school is not listed, you may enter the code as **8888888** (seven 8s).

8. Select a School Location from the dropdown options.

9. **Training Program**: Select **Search/Validate CIP**.

10. In the **CIP Code Search**, enter search criteria for the training, then **Run Search**.
11. If the appropriate code displays, select the hyperlink. If the appropriate code does not display, return to Search/Validate CIP.

![CIP Code Search screenshot]

12. **Training Title (O*NET):** Select **Search/Validate O*NET** to find the code associated to the participant’s short- or long-term employment goals as outlined in their **Individual Employment Plan.**

![Training Title (O*NET) search screenshot]

a. In **O*NET Code Search**, enter a **keyword or code number** in the search, then **Run Search.**

![O*NET Code Search screenshot]

13. If the appropriate O*NET code displays, select the hyperlink. If the correct O*NET code does not display, return to **O*NET Code Search.**
14. Enter Comments and a Case Note if desired.
   a. The case note date will be the Activity Start Date.

15. Do not enter information into the Close Activity panel at this time. This section will be completed when the activity is closed. Select from the following options: Save, Save an Open New Activity, or Cancel.

   a. Save. The Activity Summary will display.
b. **Save and Open New Activity.** The **Adult Career Pathways Activity** page will display. Return to **Entering Activities.**

c. **Cancel.**
   
i. Information entered into this Activity will be canceled and not saved. The **Activity Summary** page will display.
**OJT (On-the-Job Training) – Public or Private**

A work placement made through a contract with an employer or registered apprenticeship program sponsor in the public, private non-profit, or private sector. An OJT contract must be limited to the period of time required for a participant to become proficient in the occupation for which the training is being provided. The OJT Service Provider provides the Employer with a partial wage reimbursement, typically up to 50 percent of the wage rate of the participant for the extraordinary costs of providing the training and supervision related to the training.

1. From **Cases > Activities > Add ACP Activity** within the **Adult Career Pathways Enrolled** sequence.

2. Select **OJT (On-the-Job Training) – Public or Private** from the dropdown options, then **Next**.
3. In the **Open Activity** section, enter the required fields (*):
   a. **Start Date**: the date the participant began the ADP.
   b. **Funding Stream**: select the appropriate grant funding stream which is supporting the selected activity.

4. If known, enter the optional fields:
   a. **Estimated End Date**: the date the participant is anticipated to receive their diploma.
   b. **Activity Subtype**
   c. **Estimated Cost**: If activity will be charged to the specified Funding Stream, enter the estimated cost.
   d. **Estimated Hours**: Enter the hours that the participant is expected to be engaged in this activity from the **Start Date** through **Estimated End Date**.
   e. **User Defined Text** fields may be entered per each organization’s discretion. Text entered here may be used by organizations to pull specific data through Search > Advanced Search.

5. Enter required (*) fields in the **Employment Info** panel.
a. **Employer Name**

b. **Hourly Wage**

c. **Occupational Title (O*NET):** Select **Search/Validate O*NET** to find the code associated to the participant’s employment:

d. **In O*NET Code Search,** enter a keyword or code number in the search, then **Run Search.**

e. **If the appropriate O*NET code displays,** select the hyperlink. **If the correct O*NET code does not display,** return to **O*NET Code Search.**
6. Enter optional employment information, if known:
   a. Worksite, Address, City, Zip, County, Country, Job Title, Hours per Week, Employment Type, and Employer Industry (NAICS):

   ![Employment Info Panel]

7. If known and applicable, enter optional information on the School Info panel:
   d. School: Select Search/Validate School.

   ![School Info Panel]
8. In the **School Code Search**, enter the name or code number of a school, then **Run Search**.

9. If the correct school displays, select the hyperlink to have the code prepopulate into the *School* field on the activity.
   
e. If the correct school does not display with the criteria you used (such as the school name), try the **School Code Search** again with another criteria (such as “community” or “college”).

   ![School Code Search]

   f. If the school is not listed, you may enter the code as **8888888** (seven 8s).

10. Select a *School Location* from the dropdown options.

11. **Training Program**: Select **Search/Validate CIP**.

   ![Training Program (CIP)]

12. In the **CIP Code Search**, enter search criteria, then **Run Search**.
13. If the appropriate code displays, select the hyperlink. If the appropriate code does not display, return to Search/Validate CIP.

14. *Training Title (O*NET)*: Select Search/Validate O*NET to find the code associated to the participant’s short- or long-term employment goals as outlined in their Individual Employment Plan.


g. In O*NET Code Search, enter a *keyword or code number* in the search, then Run Search.

15. If the appropriate O*NET code displays, select the hyperlink. If the correct O*NET code does not display, return to O*NET Code Search.
16. Enter **Comments** and a **Case Note** if desired.
   d. The case note date will be the *Activity Start Date*.

17. Do not enter information into the **Close Activity** panel at this time. This section will be completed when the activity is closed. Select from the following options: **Save**, **Save an Open New Activity**, or **Cancel**.

   d. **Save**. The **Activity Summary** will display.
e. **Save and Open New Activity.** The Adult Career Pathways Activity page will display. Return to [Entering Activities](#).

f. **Cancel.**

   i. Information entered into this Activity will be canceled and not saved. The Activity Summary page will display.
Orientation
Orientation may be delivered via a group setting, or may be part of an individual counseling session. The orientation includes information on program benefits and opportunities available, rights and responsibilities for participating, etc.

1. From **Cases > Activities > Add ACP Activity** within the **Adult Career Pathways Enrolled** sequence.

2. Select **Orientation** from the dropdown options, then **Next**.
3. In the **Open Activity** section, enter the required fields (*):  
   a. **Start Date**: the date the participant began the ADP.  
   b. **Funding Stream**: select the appropriate grant funding stream which is supporting the selected activity.

4. If known, enter the optional fields:  
   a. **Estimated End Date**: the date the participant is anticipated to receive their diploma.  
   b. Activity Subtype  
   c. **Estimated Cost**: If activity will be charged to the specified Funding Stream, enter the estimated cost.  
   d. **Estimated Hours**: Enter the hours that the participant is expected to be engaged in this activity from the **Start Date** through **Estimated End Date**.  
   e. **User Defined Text** fields may be entered per each organization’s discretion. Text entered here may be used by organizations to pull specific data through **Search > Advanced Search**.

5. Enter **Comments** and a **Case Note** if desired.  
   a. The case note date will be the **Activity Start Date**.

---

**Adult Career Pathways Activity**

Becca Johnson  
Birth Date 07/13/1989

Program Seq 1  
Agency: Location

Enrollment Date 04/26/2018  
Entered by Becca L Johnson

*Assign to Staff Johnson, Becca (Current Primary)

*Activity Type Orientation

**Next** **Cancel**
6. Do not enter information into the Close Activity panel at this time. This section will be completed when the activity is closed. Select from the following options: **Save**, **Save an Open New Activity**, or **Cancel**.

- **Save**: The Activity Summary will display.

- **Save and Open New Activity**: The Adult Career Pathways Activity page will display. Return to Entering Activities.
Paid Work Experience
This activity is used when a participant is in a temporary paid employment experience in the public, private nonprofit, or private sector.

1. From **Cases > Activities > Add ACP Activity** within the **Adult Career Pathways Enrolled** sequence.

   c. **Cancel.**

   i. Information entered into this Activity will be canceled and not saved. The **Activity Summary** page will display.
2. Select **Paid Work Experience** from the dropdown options, then **Next**.

3. In the **Open Activity** section, enter the required fields (*):
   a. **Start Date**: the date the participant began the ADP.
   b. **Funding Stream**: select the appropriate grant funding stream which is supporting the selected activity.

4. If known, enter the optional fields:
   a. **Estimated End Date**: the date the participant is anticipated to receive their diploma.
   b. **Activity Subtype**
   c. **Estimated Cost**: If activity will be charged to the specified Funding Stream, enter the estimated cost.
   d. **Estimated Hours**: Enter the hours that the participant is expected to be engaged in this activity from the **Start Date** through **Estimated End Date**.
   e. **User Defined Text** fields may be entered per each organization’s discretion. Text entered here may be used by organizations to pull specific data through **Search > Advanced Search**.

5. Enter required (*) fields in the **Employment Info** panel.
a. Employer Name
b. Hourly Wage
c. Occupational Title (O*NET): Select Search/Validate O*NET to find the code associated to the participant’s employment:

d. In O*NET Code Search, enter a keyword or code number in the search, then Run Search.

e. If the appropriate O*NET code displays, select the hyperlink. If the correct O*NET code does not display, return to O*NET Code Search.
6. Enter optional employment information, if known:
   a. Worksite, Address, City, Zip, County, Country, Job Title, Hours per Week, Employment Type, and Employer Industry (NAICS):

7. Enter Comments and a Case Note if desired.
   e. The case note date will be the Activity Start Date.
21. Do not enter information into the Close Activity panel at this time. This section will be completed when the activity is closed. Select from the following options: **Save**, **Save an Open New Activity**, or **Cancel**.

   - **Save**. The **Activity Summary** will display.

   - **Save and Open New Activity**. The **Adult Career Pathways Activity** page will display. Return to **Entering Activities**.
c. **Cancel.**  
   i. Information entered into this Activity will be canceled and not saved. The **Activity Summary** page will display.

**Retention**  
This activity is used to keep the program sequence open after they have gained employment in order to provide continued support in the first 90 days. This could include career counseling, support services, or other necessary resources to assist the participant in maintaining employment.

1. From **Cases > Activities > Add ACP Activity** within the **Adult Career Pathways Enrolled** sequence.
2. Select **Retention** from the dropdown options, then **Next**.

3. In the **Open Activity** section, enter the required fields (*):
   a. **Start Date**: the date the participant began the ADP.
   b. **Funding Stream**: select the appropriate grant funding stream which is supporting the selected activity.
   c. **Estimated End Date**: the date the participant is anticipated to receive their diploma.
   d. **Activity Subtype**: Enter the hours that the participant is expected to be engaged in this activity from the **Start Date** through **Estimated End Date**.
   e. **User Defined Text** fields may be entered per each organization’s discretion. Text entered here may be used by organizations to pull specific data through **Search > Advanced Search**.

4. If known, enter the optional fields:
   a. **Activity Type**
   b. **Estimated Cost**: If activity will be charged to the specified **Funding Stream**, enter the estimated cost.

5. Enter required (*) fields in the **Employment Info** panel.
a. **Employer Name**

b. **Hourly Wage**

c. **Occupational Title (O*NET):** Select **Search/Validate O*NET** to find the code associated to the participant’s employment:

d. In **O*NET Code Search**, enter a keyword or code number in the search, then **Run Search**.

e. If the appropriate O*NET code displays, select the hyperlink. If the correct O*NET code does not display, return to **O*NET Code Search**.
6. Enter optional employment information, if known:
   a. Worksite, Address, City, Zip, County, Country, Job Title, Hours per Week, Employment Type, and Employer Industry (NAICS):

7. If known and applicable, enter optional information on the School Info panel:
   h. School: Select Search/Validate School.
8. In the **School Code Search**, enter the name or code number of a school, then **Run Search**.

![School Code Search]

9. If the correct school displays, select the hyperlink to have the code prepopulate into the *School* field on the activity.
   
i. If the correct school does not display with the criteria you used (such as the school name), try the **School Code Search** again with another criteria (such as “community” or “college”).

![School Code Search](example)

   * If the school is not listed, you may enter the code as **8888888** (seven 8s).

10. Select a *School Location* from the dropdown options.

11. **Training Program**: Select **Search/Validate CIP**.

12. In the **CIP Code Search**, enter search criteria, then **Run Search**.
13. If the appropriate code displays, select the hyperlink. If the appropriate code does not display, return to Search/Validate CIP.

14. Training Title (O*NET): Select Search/Validate O*NET to find the code associated to the participant’s short- or long-term employment goals as outlined in their Individual Employment Plan.

15. If the appropriate O*NET code displays, select the hyperlink. If the correct O*NET code does not display, return to O*NET Code Search.
16. Enter **Comments** and a **Case Note** if desired.
   
f. The case note date will be the *Activity Start Date*.

17. Do not enter information into the **Close Activity** panel at this time. This section will be completed when the activity is closed. Select from the following options: **Save**, **Save an Open New Activity**, or **Cancel**.

d. **Save**. The **Activity Summary** will display.
e. **Save and Open New Activity.** The *Adult Career Pathways Activity* page will display. Return to [Entering Activities](#).

f. **Cancel.**
   
i. Information entered into this Activity will be canceled and not saved. The *Activity Summary* page will display.
**Self-Employment Training**

Activity that improves the employability of participants by providing training in setting up and operating a small business or other self-employment venture.

1. From **Cases > Activities > Add ACP Activity** within the **Adult Career Pathways Enrolled** sequence.

2. Select **Self-Employment Training** from the dropdown options, then **Next**.
3. In the **Open Activity** section, enter the required fields (*):
   a. **Start Date**: the date the participant began the ADP.
   b. **Funding Stream**: select the appropriate grant funding stream which is supporting the selected activity.

4. If known, enter the optional fields:
   a. **Estimated End Date**: the date the participant is anticipated to receive their diploma.
   b. **Activity Subtype**
   c. **Estimated Cost**: If activity will be charged to the specified **Funding Stream**, enter the estimated cost.
   d. **Estimated Hours**: Enter the hours that the participant is expected to be engaged in this activity from the **Start Date** through **Estimated End Date**.
   e. **User Defined Text** fields may be entered per each organization’s discretion. Text entered here may be used by organizations to pull specific data through **Search > Advanced Search**.

5. Enter required (*) fields in the **Employment Info** panel.
a. Employer Name
b. Hourly Wage
c. Occupational Title (O*NET): Select Search/Validate O*NET to find the code associated to the participant’s employment:

d. In O*NET Code Search, enter a keyword or code number in the search, then Run Search.

![O*NET Code Search](image)

If the appropriate O*NET code displays, select the hyperlink. If the correct O*NET code does not display, return to O*NET Code Search.

6. Enter optional employment information, if known:
   a. Worksite, Address, City, Zip, County, Country, Job Title, Hours per Week, Employment Type, and Employer Industry (NAICS):
16. Enter required (*) information on the **School Info** panel:
   
   **a. School:** Select **Search/Validate School.**

17. In the **School Code Search,** enter the name or code number of a school, then **Run Search.**

18. If the correct school displays, select the hyperlink to have the code prepopulate into the **School** field on the activity.

   **a.** If the correct school does not display with the criteria you used (such as the school name), try the **School Code Search** again with another criteria (such as “community” or “college”).
19. Select a *School Location* from the dropdown options.

20. **Training Program**: Select **Search/Validate CIP**.

21. In the **CIP Code Search**, enter search criteria, then **Run Search**.

22. If the appropriate code displays, select the hyperlink.

23. **Training Title (O*NET)**: Select **Search/Validate O*NET** to find the code associated to the participant’s short- or long-term employment goals as outlined in their **Individual Employment Plan**.
a. In **O*NET Code** Search, enter a *keyword or code number* in the search, then **Run Search.**

![O*NET Code Search](image)

24. If the appropriate O*NET code displays, select the hyperlink. If the correct O*NET code does not display, return to **O*NET Code Search.**

![O*NET Code Search](image)

7. Enter **Comments** and a **Case Note** if desired.  
   
g. The case note date will be the **Activity Start Date.**

![Comments](image)  

![Case Note](image)

8. Do not enter information into the **Close Activity** panel at this time. This section will be completed when the activity is closed. Select from the following options: **Save**, **Save an Open New Activity**, or **Cancel.**
g. **Save.** The **Activity Summary** will display.

![Activity Summary](image)

h. **Save and Open New Activity.** The **Adult Career Pathways Activity** page will display. Return to **Entering Activities.**

![Adult Career Pathways Activity](image)
i. **Cancel.**

   i. Information entered into this Activity will be canceled and not saved. The **Activity Summary** page will display.

---

**Staff-Assisted Job Placement**

Referral to programs for job openings, job seeking and job development.

1. From **Cases > Activities > Add ACP Activity** within the **Adult Career Pathways Enrolled** sequence.

2. Select **Staff-Assisted Job Placement** from the dropdown options, then **Next**.
3. In the **Open Activity** section, enter the required fields (*):
   a. **Start Date**: the date the participant began the ADP.
   b. **Funding Stream**: select the appropriate grant funding stream which is supporting the selected activity.

4. If known, enter the optional fields:
   a. **Estimated End Date**: the date the participant is anticipated to receive their diploma.
   b. **Activity Subtype**
   c. **Estimated Cost**: If activity will be charged to the specified *Funding Stream*, enter the estimated cost.
   d. **Estimated Hours**: Enter the hours that the participant is expected to be engaged in this activity from the **Start Date** through **Estimated End Date**.
   e. **User Defined Text** fields may be entered per each organization’s discretion. Text entered here may be used by organizations to pull specific data through [Search > Advanced Search](#).

5. Enter required (*) fields in the **Employment Info** panel.
a. **Employer Name**

b. **Hourly Wage**

c. **Occupational Title (O*NET):** Select **Search/Validate O*NET** to find the code associated to the participant’s employment:

d. **In O*NET Code Search, enter a keyword or code number in the search, then Run Search.**

  ![O*NET Code Search](image)

  - **Search for keyword or code number:** Nurs
  - Wildcard indicator (*) is not needed for keyword search.
  - Example: Entering a partial word such as Nurs will return results including nurse, nurses and nursing.

  ![Run Search and Cancel Buttons](image)

e. **If the appropriate O*NET code displays, select the hyperlink. If the correct O*NET code does not display, return to O*NET Code Search.**
6. Enter optional employment information, if known:
   a. Worksite, Address, City, Zip, County, Country, Job Title, Hours per Week, Employment Type, and Employer Industry (NAICS):

7. Enter Comments and a Case Note if desired.
   h. The case note date will be the Activity Start Date.
8. Do not enter information into the Close Activity panel at this time. This section will be completed when the activity is closed. Select from the following options: Save, Save an Open New Activity, or Cancel.

j. Save. The Activity Summary will display.

k. Save and Open New Activity. The Adult Career Pathways Activity page will display. Return to Entering Activities.
I. **Cancel.**
   
   i. Information entered into this Activity will be canceled and not saved. The **Activity Summary** page will display.

---

**Staff-Assisted Job Search in Area**

Staff-assisted job search and interview preparation for job(s) within a 50-mile radius.

1. From **Cases > Activities > Add ACP Activity** within the **Adult Career Pathways Enrolled** sequence.
2. Select **Staff-Assisted Job Search In Area** from the dropdown options, then **Next**.

3. In the **Open Activity** section, enter the required fields (*):
   a. **Start Date**: the date the participant began the ADP.
   b. **Funding Stream**: select the appropriate grant funding stream which is supporting the selected activity.

4. If known, enter the optional fields:
   a. **Estimated End Date**: the date the participant is anticipated to receive their diploma.
b. **Activity Subtype**

c. **Estimated Cost:** If activity will be charged to the specified *Funding Stream*, enter the estimated cost.

d. **Estimated Hours:** Enter the hours that the participant is expected to be engaged in this activity from the *Start Date* through *Estimated End Date*.

e. **User Defined Text** fields may be entered per each organization’s discretion. Text entered here may be used by organizations to pull specific data through **Search > Advanced Search**.

5. Enter **Comments** and a **Case Note** if desired.
   a. The case note date will be the *Activity Start Date*.

6. Do not enter information into the **Close Activity** panel at this time. This section will be completed when the activity is closed. Select from the following options: **Save**, **Save an Open New Activity**, or **Cancel**.

   a. **Save.** The **Activity Summary** will display.
b. **Save and Open New Activity.** The Adult Career Pathways Activity page will display. Return to **Entering Activities.**

c. **Cancel.**
   
i. Information entered into this Activity will be canceled and not saved. The **Activity Summary** page will display.
Staff-Assisted Job Search Out-of-Area
Staff-assisted job search and interview preparation for job(s) outside a 50-mile radius.

1. From **Cases > Activities > Add ACP Activity** within the **Adult Career Pathways Enrolled** sequence.

2. Select **Staff-Assisted Job Search Out-of-Area** from the dropdown options, then **Next**.
3. In the **Open Activity** section, enter the required fields (*):
   a. **Start Date**: the date the participant began the ADP.
   b. **Funding Stream**: select the appropriate grant funding stream which is supporting the selected activity.

4. If known, enter the optional fields:
   a. **Estimated End Date**: the date the participant is anticipated to receive their diploma.
   b. **Activity Subtype**
   c. **Estimated Cost**: If activity will be charged to the specified **Funding Stream**, enter the estimated cost.
   d. **Estimated Hours**: Enter the hours that the participant is expected to be engaged in this activity from the **Start Date** through **Estimated End Date**.
   e. **User Defined Text** fields may be entered per each organization’s discretion. Text entered here may be used by organizations to pull specific data through **Search > Advanced Search**.

5. Enter **Comments** and a **Case Note** if desired.
   a. The case note date will be the **Activity Start Date**.
6. Do not enter information into the **Close Activity** panel at this time. This section will be completed when the activity is closed. Select from the following options: **Save, Save an Open New Activity,** or **Cancel.**

   - **Save.** The **Activity Summary** will display.

   - **Save and Open New Activity.** The **Adult Career Pathways Activity** page will display. Return to **Entering Activities.**
c. **Cancel.**
   i. Information entered into this Activity will be canceled and not saved. The **Activity Summary** page will display.

**Uncompensated Work Experience**
This activity is used when a participant is in a temporary unpaid employment experience in the public, private nonprofit, or private sector.

1. From **Cases > Activities > Add ACP Activity** within the **Adult Career Pathways Enrolled** sequence.
2. Select **Uncompensated Work Experience** from the dropdown options, then **Next**.

**Adult Career Pathways Activity**

3. In the **Open Activity** section, enter the required fields (*):
   a. **Start Date**: the date the participant began the ADP.
   b. **Funding Stream**: select the appropriate grant funding stream which is supporting the selected activity.

4. If known, enter the optional fields:
   a. **Estimated End Date**: the date the participant is anticipated to receive their diploma.
   b. **Activity Subtype**
   c. **Estimated Cost**: If activity will be charged to the specified _Funding Stream_, enter the estimated cost.
   d. **Estimated Hours**: Enter the hours that the participant is expected to be engaged in this activity from the **Start Date** through **Estimated End Date**.
   e. **User Defined Text** fields may be entered per each organization’s discretion. Text entered here may be used by organizations to pull specific data through **Search > Advanced Search**.

5. Enter required (*) fields in the **Employment Info** panel.
a. Employer Name

b. Hourly Wage

c. Occupational Title (O*NET): Select Search/Validate O*NET to find the code associated to the participant’s employment:

d. In O*NET Code Search, enter a keyword or code number in the search, then Run Search.

e. If the appropriate O*NET code displays, select the hyperlink. If the correct O*NET code does not display, return to O*NET Code Search.
6. Enter optional employment information, if known:
   a. Worksite, Address, City, Zip, County, Country, Job Title, Hours per Week, Employment Type, and Employer Industry (NAICS):

7. Enter Comments and a Case Note if desired.
   i. The case note date will be the Activity Start Date.
22. Do not enter information into the **Close Activity** panel at this time. This section will be completed when the activity is closed. Select from the following options: **Save**, **Save an Open New Activity**, or **Cancel**.

   - **Save.** The **Activity Summary** will display.
   - **Save and Open New Activity.** The **Adult Career Pathways Activity** page will display. Return to **Entering Activities**.
c. **Cancel.**
   
i. Information entered into this Activity will be canceled and not saved. The *Activity Summary* page will display.

---

**Work Readiness Skills Training**

Instruction in job-seeking techniques including, but not limited to, soft skills such as professionalism or communication and teamwork, online job search tools, resume writing, mock interviews, job skills assessments, job search clubs, or other direct training or support activities.

1. From **Cases > Activities > Add ACP Activity** within the **Adult Career Pathways Enrolled** sequence.
2. Select **Work Readiness Skills Training** from the dropdown options, then **Next**.

3. In the **Open Activity** section, enter the required fields (*):
   a. **Start Date**: the date the participant began the ADP.
   b. **Funding Stream**: select the appropriate grant funding stream which is supporting the selected activity.

4. If known, enter the optional fields:
   a. **Estimated End Date**: the date the participant is anticipated to receive their diploma.
   b. **Activity Subtype**
   c. **Estimated Cost**: If activity will be charged to the specified Funding Stream, enter the estimated cost.
   d. **Estimated Hours**: Enter the hours that the participant is expected to be engaged in this activity from the **Start Date** through **Estimated End Date**.
   e. **User Defined Text** fields may be entered per each organization’s discretion. Text entered here may be used by organizations to pull specific data through **Search > Advanced Search**.
5. If known and applicable, enter optional information on the **School Info** panel:
   
a. **School:** Select **Search/Validate School.**

6. In the **School Code Search**, enter the name or code number of a school, then **Run Search.**

7. If the correct school displays, select the hyperlink to have the code prepopulate into the **School** field on the activity.
   
a. If the correct school does not display with the criteria you used (such as the school name), try the **School Code Search** again with another criteria (such as “community” or “college”).

   b. If the school is not listed, you may enter the code as **8888888** (seven 8s).
8. Select a *School Location* from the dropdown options.

9. *Training Program:* Select **Search/Validate CIP**.

10. In the **CIP Code Search**, enter search criteria, then **Run Search**.

11. If the appropriate CIP Code displays, select the hyperlink.

12. *Training Title (O*NET):* Select **Search/Validate O*NET** to find the code associated to the participant’s short- or long-term employment goals as outlined in their **Individual Employment Plan**.

   a. In **O*NET Code Search**, enter a *keyword or code number* in the search, then **Run Search**.
13. If the appropriate O*NET code displays, select the hyperlink. If the correct O*NET code does not display, return to O*NET Code Search.

14. Enter Comments and a Case Note if desired.
   a. The case note date will be the Activity Start Date.

15. Do not enter information into the Close Activity panel at this time. This section will be completed when the activity is closed. Select from the following options: Save, Save an Open New Activity, or Cancel.
a. **Save.** The **Activity Summary** will display.

b. **Save and Open New Activity.** The **Adult Career Pathways Activity** page will display. Return to **Entering Activities.**
c. **Cancel.**  
   i. Information entered into this Activity will be canceled and not saved. The **Activity Summary** page will display.

![WorkflowOne Interface]

**Credentials**

WorkforceOne (WF1) Credentials are used to record certificates and credentials obtained by the participant as a result of participating in the program. As Credential attainments are used to monitor compliance with the grant program contract and expected outcomes, it is important to capture all recognized certificates and credentials.

1. From the **Person At-A-Glance** page, select **Cases > Credential**.
2. Select **Add Credential**.

3. **Program Sequence.** Select **Adult Career Pathways**.

4. **Credential Type.** Options include:
   a. Occupational Skills Certificate
   b. Occupational Certification
c. Technical/Occupational Skills License  
d. Certificate of Completion of an Apprenticeship  
e. AA or AS Degree  
f. BA or BS Degree  
g. Master’s Degree  
h. Doctorate Degree  
i. Other Recognized Credential  
j. Credential Pending  
k. No Credential Attained

**Credential Type Definitions**

<table>
<thead>
<tr>
<th>Credential</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>AA or AS Degree</td>
<td>Associate of Arts or Associate of Science degree.</td>
</tr>
<tr>
<td>BA or BS Degree</td>
<td>Bachelor of Arts or Bachelor of Science degree.</td>
</tr>
<tr>
<td>Certificate of Completion of an Apprenticeship</td>
<td>A certificate obtained upon the successful completion of an apprenticeship.</td>
</tr>
<tr>
<td>Credential Pending</td>
<td>A Credentialed Coursework/Training activity has been opened and the participant expects to earn a credential, but it is pending.</td>
</tr>
<tr>
<td>Doctorate Degree</td>
<td>Doctorate degree.</td>
</tr>
<tr>
<td>High School Equivalency</td>
<td>High School Diploma, General Education Diploma (GED), or Adult Diploma Program certificate.</td>
</tr>
<tr>
<td>Master’s Degree</td>
<td>Master’s degree.</td>
</tr>
<tr>
<td>No Credential Obtained</td>
<td>No credentials or certificates have been obtained by the participant.</td>
</tr>
</tbody>
</table>
| Occupational Skills Certificate | A certificate, which is not an industry-recognized credential, obtained that is specific to an occupation.  

*Examples include Soldering, Personal Care Attendant (PCA)*

| On-Ramp Certificate | Skilled training will likely result in a certificate that is relevant to a key industry sector coupled with pre-employment training. On-Ramp certificates are not required to meet the definition of what the Department of Labor (DOL) identifies as an industry-recognized credential in order to meet the needs and skill level of the population.  
*Examples include ServSafe, Bank Teller Training, Cable Company Customer Service, and Northstar Digital Literacy.* |

<p>| Other Recognized Credential | Department of Labor (DOL) Industry-Recognized Credential. |</p>
<table>
<thead>
<tr>
<th>Credential</th>
<th>Definition</th>
<th>Examples</th>
<th>Commercial Driver’s License (CDL), Food Manager Certificate.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Technical/Occupational Skills License</td>
<td>A license that is specific to a technical career or specific occupation which is required or beneficial for a participant to obtain employment in the specified career sector.</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Support Services**

WorkforceOne (WF1) Support Services are used to record direct participant expenses which were received during the program enrollment and purchased out of grant funds. It is important to capture all support services received and that they align with each request for grant funds. Support services are payments which assist participants in engaging in activities approved in the individual employment plan.

*Please note: support services provided must be pre-approved within the organizations’ negotiated contracted work plan with the Minnesota Department of Employment and Economic Development (DEED).*

1. From with **Person At-A-Glance** page, select **Service > Support Services**.

2. Select **Add Support Service** within the **Enrolled ACP Sequence**.

---

---
3. **Staff Assigned.** Update staff member if necessary from the dropdown options.
4. Select the applicable **Support Service** type from the dropdown choices. Options are listed in the Support Services Definitions.
5. **Service Date:** enter the date the cost was incurred.
6. **Actual Amount:** enter the actual amount the organization spent on the specified support service. If the support service was obtained at a discounted price, enter the amount actually paid (not the value).
7. **Funding Stream:** select the funding stream which paid for the support service from the dropdown options.
8. **Save.**
Support Service Definitions

<table>
<thead>
<tr>
<th>Support Service</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>Child and Dependent Care</td>
<td>Costs associated to the cost of a care of a child or dependent in order for them to participate in activities approved in the individual employment plan.</td>
</tr>
<tr>
<td>Educational Testing</td>
<td>Education testing which is not part of a formal training program.</td>
</tr>
<tr>
<td>Emergency Financial Assistance</td>
<td>A payment necessary to stabilize the participant in order to be able to complete training and/or employment goals.</td>
</tr>
<tr>
<td>Housing and Rental Assistance</td>
<td>Payments to vendors on behalf of the participant in order to obtain or sustain permanent housing.</td>
</tr>
<tr>
<td>Medical Services</td>
<td>Expenses for costs including dental, health care, health insurance, drug &amp; alcohol counseling, personal counseling, or other medical services.</td>
</tr>
<tr>
<td>Supplemental Training Materials</td>
<td>Books, fees, supplies, etc. to complete a training program, which is not covered by tuition/fees. Note: tuition/fees are not recorded as a direct participant expense under support services, rather, it is a training cost.</td>
</tr>
<tr>
<td></td>
<td>Example: Participant is enrolled in a phlebotomy training and needs supplemental materials above and beyond the required course materials in order to successfully complete training.</td>
</tr>
<tr>
<td>Temporary Shelter</td>
<td>Emergency housing for a participant experiencing housing instability insecurity.</td>
</tr>
<tr>
<td>Tools and Clothing</td>
<td>Tools and clothing required for job interviews or to sustain employment. Note: Tools and clothing required as part of a training program are not a support services, but rather a direct customer training expense.</td>
</tr>
<tr>
<td>Transportation</td>
<td>Costs associated to transportation to complete training, interview for a job, or sustain employment.</td>
</tr>
</tbody>
</table>

Individual Employment Plan

WorkforceOne (WF1) Plans are used to record the participant’s work plan and goals in relation to program participation. The Individual Employment Plan (IEP) is an ongoing strategy to identify employment goals, achievement objectives, and an appropriate combination of services including support services. The IEP policy may be found on the Policy and Guidance section of DEED’s website. The IEP can be a paper document maintained the participant’s file, or it may be entered online in WF1. The IEP must be updated accordingly to reflect any changes in the participant’s plan.

2. Select **Add Plan** within the **Adult Career Pathways – Enrolled** sequence.

3. In the **Plan Mode** dropdown, select either Online or Paper.
Paper Plan

1. If the IEP is a paper document, select *Paper*, then **Save and Continue**. If the IEP will be entered online, proceed to the **Online Plan**.

2. The **Start Date** prepopulates to the current date. Update it, if necessary, to the date the IEP was signed.

3. The **Review Date** prepopulates to one year from the current date. Update it, if necessary, to one year from the date the IEP was signed.
4. Enter the date IEP was signed in **Confirmation Date**.

5. Select **Save an Activate** if the IEP is complete with all necessary components and signatures.  
   a. Select **Save as Pending** if the IEP is incomplete.  
   b. **Delete Pending Plan** to cancel the IEP entry.
Online Plan
1. From Add Plan, select Online as the Plan Mode, then Save and Continue.
2. Enter the participant’s **Full Legal Name**, including middle names and suffixes if applicable.

3. Expand the **Goals** section and enter the participant’s short- and long-term goals.
4. Within **Plan Sections, Add Section.** Options include:
   
a. **Assessment**
b. **Barriers**
c. **Child Care**
d. **Employment**
e. I understand that or agree to:
   
f. **Other**
g. **Support Services**
h. **Training**
i. **Transportation**

**Assessment**

1. An Objective Assessment is a required component of an IEP. Select **Assessment**, then **Add Section.**

2. Select **Add Action Step** to choose from a list of options, or select **Add Custom Step** to create your own.
   
a. **Add Action Step:**

1. Select an **Action Step** from the list, then **Continue.**
ii. The **Action Step** chosen (which in this example was *TABE*) will require additional information (which in this example, the additional information requested are the results of the assessment). Select **Results** or whatever hyperlink displays for the chosen action step.

iii. Complete the **Text Entry** for **Results**, then select **OK**.
b. **Add Custom Step:**

   i. Type the participant’s **Custom Step** in the text box.

3. Continue adding appropriate **Action Steps** or **Custom Steps** to the plan section.
4. Expand the **Comments for Printed Plan** text box and enter comments if necessary.
5. If a referral was made in relation to the entries above, expand the **Referral** section and **Add Referral**.

   - **Enter Referral Information.**

   ![Image of Referral Section]

6. Once finished with Action Steps, Comments, and Referral information, **Save Section**.
Barriers

1. Select Barriers from Plan Sections > Add Section to record any barriers the participant has to participation in the program or obtaining employment.

2. Select Add Action Step to choose from a list of options, or select Add Custom Step to create your own.
   a. Add Action Step:
1. Select an **Action Step** from the list, then **Continue**.

   ![Action Steps]

   ii. The **Action Step** chosen (which in this example was *Computer Skills*) will require additional information (which in this example, the additional information requested are specifics about what computer skills are necessary). Select **Provide Specifics** or whatever hyperlink displays for the chosen action step.

   ![Hide Action Steps]

   iii. Complete the **Text Entry** for **Provide Specifics**, then select **OK**.
b. **Add Custom Step:**

iv. Type the participant’s **Custom Step** in the text box.

3. Continue adding appropriate **Action Steps** or **Custom Steps** to the plan section.
4. Expand the **Comments for Printed Plan** text box and enter comments if necessary.
5. If a referral was made to address barriers entered above, expand the **Referral** section and **Add Referral**.

6. Enter Referral Information.

7. Once finished with Action Steps, Comments, and Referral information, **Save Section**.
Child Care
1. Select *Child Care* from **Plan Sections > Add Section** to record any child care needs of the participant.

2. Select **Add Action Step** to choose from a list of options, or select **Add Custom Step** to create your own.
   a. **Add Action Step**:
      i. Select an **Action Step** from the list, then **Continue**.
ii. The **Action Step** chosen (which in this example was *Look for and get child care by*) will require additional information (which in this example, the additional information requested is a timeframe). Select **Timeframe** or whatever hyperlink displays for the chosen action step.

![Image of action steps](image)

iii. Complete the **Text Entry** for **Timeframe**, then select **OK**.

![Image of text entry](image)

b. **Add Custom Step:**
1. Type the participant’s **Custom Step** in the text box.

2. Continue adding appropriate **Action Steps** or **Custom Steps** to the plan section.

3. Expand the **Comments for Printed Plan** text box and enter comments if necessary.

4. If a referral was made in relation to the entries above, expand the **Referral** section and **Add Referral**.
5. Enter Referral Information.

6. Once finished with Action Steps, Comments, and Referral information, **Save Section**.
1. Select Employment from Plan Sections > Add Section to record action steps related to employment.

2. Select Add Action Step to choose from a list of options, or select Add Custom Step to create your own.
   a. Add Action Step:
      i. Select an Action Step from the list, then Continue.
         ii. The Action Step chosen (which in this example was Attend workshop/class on day(s)/time/location) may require additional information (which in this example, the additional information requested is a workshop/class and day(s)/time/location). Select the hyperlink(s) displayed to complete the chosen action step.
iii. Complete the Text Entry, then select OK.

b. Add Custom Step:

i. Type the participant’s Custom Step in the text box.
3. Continue adding appropriate **Action Steps** or **Custom Steps** to the plan section.

4. Expand the **Comments for Printed Plan** text box and enter comments if necessary.

5. If a referral was made in relation to the entries above, expand the **Referral** section and **Add Referral**.

6. Enter Referral Information.
Once finished with Action Steps, Comments, and Referral information, **Save Section**.

**Participant Agreement(s) for Program Participation**

1. Select **I understand that or agree to** from Plan Sections > **Add Section** to record the program/employment plan agreement between the counselor and participant.

2. Select **Add Action Step** to choose from a list of options, or select **Add Custom Step** to create your own.
   
   a. **Add Action Step**:
i. Select an **Action Step** from the list, then **Continue**.

ii. The **Action Step** chosen (which in this example was *I will maintain {frequency} contact with my counselor/case manager, either through telephone or e-mail*) may require additional information (which in this example, the additional information requested is *frequency* of contact). Select the hyperlink(s) displayed to complete the chosen action step.

iii. Complete the **Text Entry**, then select **OK**.
b. **Add Custom Step:**

i. Type the participant’s **Custom Step** in the text box.

3. Continue adding appropriate **Action Steps** or **Custom Steps** to the plan section.

4. Expand the **Comments for Printed Plan** text box and enter comments if necessary.
5. If a referral was made in relation to the entries above, expand the **Referral** section and **Add Referral**.

   a. Enter Referral Information.

6. Once finished with Action Steps, Comments, and Referral information, **Save Section**.
Support Services

1. Select *Support Services* from **Plan Sections > Add Section** to record the participant’s needs for supportive services during the program.

2. Select **Add Action Step** to choose from a list of options, or select **Add Custom Step** to create your own.

   a. **Add Action Step:**

      i. Select an **Action Step** from the list, then **Continue**.
ii. The **Action Step** chosen (which in this example was *Clothing/uniforms*) may require additional information (which in this example, the additional information requested is **Provide Specifics**). Select the hyperlink(s) displayed to complete the chosen action step.

![Image of Add Custom Step]

*b. Add Custom Step:*

![Image of Text Entry]

**Text Entry**

```
Clothing/uniforms: Provide specifics.

Provide specifics
```

**OK** **Cancel**
i. Type the participant’s **Custom Step** in the text box.

3. Continue adding appropriate **Action Steps** or **Custom Steps** to the plan section.

4. Expand the **Comments for Printed Plan** text box and enter comments if necessary.

5. If a referral was made in relation to the entries above, expand the **Referral** section and **Add Referral**.
a. Enter Referral Information.

6. Once finished with Action Steps, Comments, and Referral information, Save Section.

Training
1. Select Training from Plan Sections > Add Section to record the participant’s training plan.
2. Select Add Action Step to choose from a list of options, or select Add Custom Step to create your own.

a. Add Action Step:

i. Select an Action Step from the list, then Continue.

ii. The Action Step chosen (which in this example was *Apply for all applicable financial aid, which include {type}* ) may require additional information (which in this example, the additional
information requested is **Type**). Select the hyperlink(s) displayed to complete the chosen action step.

iii. Complete the **Text Entry**, then select **OK**.

b. **Add Custom Step:**

i. Type the participant’s **Custom Step** in the text box.
3. Continue adding appropriate **Action Steps** or **Custom Steps** to the plan section.

4. Expand the **Comments for Printed Plan** text box and enter comments if necessary.

5. If a referral was made in relation to the entries above, expand the **Referral** section and **Add Referral**.

   a. Enter Referral Information.
6. Once finished with Action Steps, Comments, and Referral information, **Save Section**.

**Transportation**

1. Select **Transportation** from **Plan Sections > Add Section** to record the participant’s transportation plan.
2. Select **Add Action Step** to choose from a list of options, or select **Add Custom Step** to create your own.

   a. **Add Action Step:**

   i. Select an **Action Step** from the list, then **Continue**.

   ![Action Step List]

   ii. The **Action Step** chosen (which in this example was *Arrange transportation by {timeframe}* *) may require additional information (which in this example, the additional information requested is **Timeframe**). Select the hyperlink(s) displayed to complete the chosen action step.

   ![Action Step Details]

   iii. Complete the **Text Entry**, then select **OK**.
b. **Add Custom Step:**

   i. Type the participant’s **Custom Step** in the text box.

3. Continue adding appropriate **Action Steps** or **Custom Steps** to the plan section.

4. Expand the **Comments for Printed Plan** text box and enter comments if necessary.
5. If a referral was made in relation to the entries above, expand the **Referral** section and **Add Referral**.

   a. Enter Referral Information.

6. Once finished with Action Steps, Comments, and Referral information, **Save Section**.
Other
1. Select *Other* from **Plan Sections > Add Section** to record any other pertinent information not already captured within the IEP.

2. Select **Add Custom Step**.

   a. Type the participant’s **Custom Step** in the text box.
3. Continue adding appropriate **Action Steps** or **Custom Steps** to the plan section.

4. Expand the **Comments for Printed Plan** text box and enter comments if necessary.

5. If a referral was made in relation to the entries above, expand the **Referral** section and **Add Referral**.

   a. Enter Referral Information.
6. Once finished with Action Steps, Comments, and Referral information, **Save Section.**

**Printing the Online Plan for Signature**
Both the participant and job counselor/case manager must sign the IEP at initial enrollment and each time the plan is updated.

1. After saving Plan Sections and the plan is complete, select the **View/Print** option.
2. On the **Print Launch** screen, select the disc icon.
3. Select PDF.
4. Select **Open** on the pop-up at the bottom of the screen.

5. Select **File > Print**. Both the job counselor/case manager and the participant must sign the plan.

6. Return to WF1 and select **Back to Plan Summary**.
7. The plan will be in Pending status. Select **Edit** to activate it after signatures have been obtained.

8. The **Start Date** prepopulates to the current date. Update it, if necessary, to the date the IEP was signed.

9. The **Review Date** prepopulates to one year from the current date. Update it, if necessary, to one year from the date the IEP was signed.

10. Enter the date IEP was signed in **Confirmation Date**.

11. Select **Save an Activate** if the IEP is complete with all necessary components and signatures.
   
   c. Select **Save as Pending** if the IEP is incomplete.
   
   d. **Delete Pending Plan** to cancel the IEP entry.

---

**Case Note**

Case notes must be entered in WorkforceOne (WF1) to provide more details surrounding program involvement, activities, progress toward goals, barriers, support services provided, etc.
Add Case Note

1. From Person At-A-Glance, select Case Note > Add Case Note.

2. Enter the required fields, which are identified with a red asterisk (*). Enter optional fields if known.
   a. **Event Date:** the date the activity/event occurred. For example, the date the job counselor/case manager spoke with the participant, or the date training began.
   b. **Note Viewable By:**
      i. Selecting *All Staff in Servicing Agency* will allow any WF1 user within the agency of the assigned staff to view the case note.
      ii. Selecting *All WF1 Staff* will allow any user with access to WF1 to view the case note.
      iii. Selecting *Private* will only allow users who are assigned to the case and the user who entered the case note access to view it.
   c. **Program:** select from the dropdown list of choices which program the case note is referencing. If there are multiple programs the case note is referencing, use the Select/Deselect option to enter more than one program.
In the **Program** window, select the appropriate programs, then **Continue**.

d. **Category**: enter the category of the note, using the **Select/Deselect** option if there are more than one categories being addressed in the note.
   NOTE: This is an optional field.

e. **Contact Method** and **Contact Type**: Select the means of the contact from the dropdown options if appropriate.
   NOTE: This is an optional field, but is encouraged to be entered. Job counselors/case managers must have live contact with the participant at least every 30 days.
f. **Status**: select *Open* or *Closed*. This status, combined with other user privileges, controls whether or not a case note is editable. Case notes will close within three days for agencies who have a batch job running to close open case notes.

![Status Selection](Image)

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h. Enter a detailed description of the note.

---

---
i. Select from the following options:
   i. **Save** to save and return to Case Note Quick View.
   ii. **Save and Remain on Page** to save the entry as is and remain on the case note entry page in order to resume entering the case note.
   iii. **Save and Add New Case Note** to save the entry, but add an additional, separate note.
   iv. **Cancel** to delete the entry.

**Case Note Quick**
This page provides a summary of the most recent five case notes created for the participant with the most recent Event Date first.

1. From **Person At-a-Glance**, select **Case Note > Case Note Quick**.

2. View Notes.
Case Note Search

1. From Person At-A-Glance, select Case Note > Case Note Search.

2. Enter the Search Criteria you’d like to view, then Run Search.
Close Program

The participant’s program sequence should be closed/exited once they are no longer in contact with the organization (after 90s of monthly attempts to contact), completes the program, the grant ends, or other reasons as defined in Exit Reason Definitions.

1. From Person At-A-Glance, select Cases > Exit.

2. Within the Adult Career Pathways – Enrolled sequence, select Exit Program Sequence.
3. Select a **Primary Exit Reason** from the dropdown options. Exit Reason options and definitions are listed [here](#).

**Cannot Locate**

1. Use the exit reason of **Cannot Locate** if the participant has not responded to requests for contact for 90 days (or less, depending on local policy).

   *Example: the service provider has attempted to contact every 30 days and has not been successful, so after 90 days, exits the participant from the program.*

2. From **Cases > Exit > Exit Program Sequence** within the **Adult Career Pathways Enrolled** sequence.
3. Select **Cannot Locate** from the dropdown options, then **Next**.

4. On the Adult Career Pathways Exit page, enter the required fields (*):
   a. **Exit Date:** the date the participant is exiting from the program. This date may not be after the grant program/funding stream has ended.
   b. **Activities Completion Result:** select whether the specified activity was **Successful** or **Unsuccessful**.
5. If known, enter the optional fields:
   a. **Labor Force Status**: the participant’s employment status at the time of exit. Options include:
      i. Employed Full-Time
      ii. Employed Part-Time
      iii. Not in Labor Force
      iv. Temporary Employment
      v. Unemployed
   b. **Actual Cost**: the amount paid for the specified activity.
6. Select the **Remove from Caseload** option to remove the participant from your dashboard.

7. Select **Save Final Exit** to complete the closure of the program, or **Save Exit as Pending** to save the exit information without closing the program, or **Cancel** to delete the entry.

**Pending Credential**

1. A **Confirmation** window will appear if a pending credential exits on the program sequence to remind you to enter whether or not the participant received a credential during program participation. Select **Yes** or **No**.
2. At the **Exit Summary** page, select **Cases > Credential** to enter the results of the pending credential.

![Exit Summary Page Example]

3. In the **Credential Type** of **Credential Pending**, select **Edit**.

![Credential Summary Page Example]

4. Follow the **Credential** instructions to complete the **Credential Summary** page.
Death
1. Use the exit reason of Death if the participant is deceased.
2. From Cases > Exit > Exit Program Sequence within the Adult Career Pathways Enrolled sequence.
3. Select Death from the dropdown options, then Next.
4. On the Adult Career Pathways Exit page, enter the required fields (*):
   a. **Exit Date**: the date the participant is exiting from the program. This date may not be after the grant program/funding stream has ended.
   b. **Activities Completion Result**: select whether the specified activity was Successful or Unsuccessful.

5. If known, enter the optional fields:
   a. **Labor Force Status**: the participant’s employment status at the time of exit. Options include:
      i. Not in Labor Force
      ii. Unemployed
   b. **Actual Cost**: the amount paid for the specified activity.
6. Select the **Remove from Caseload** option to remove the participant from your dashboard.

![Remove from caseload](image)

7. Select **Save Final Exit** to complete the closure of the program, or **Save Exit as Pending** to save the exit information without closing the program, or **Cancel** to delete the entry.

![Save Final Exit and Cancel](image)

**Pending Credential**

1. A **Confirmation** window will appear if a pending credential exits on the program sequence to remind you to enter whether or not the participant received a credential during program participation. Select **Yes** or **No**.

![Confirmation](image)

2. At the **Exit Summary** page, select **Cases > Credential** to enter the results of the pending credential.
3. In the **Credential Type** of *Credential Pending*, select **Edit**.

### Credential Summary

<table>
<thead>
<tr>
<th>Credential Type</th>
<th>Program Sequence</th>
<th>Associated Activity</th>
<th>Actual Attainment Date</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>Credential Pending</td>
<td>ACP Seq 1</td>
<td>Class Trng - 0cc Skill</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

4. Follow the [Credential](#) instructions to complete the **Credential Summary** page.
Completed Program Objective

1. Use the exit reason of **Completed Program Objective** if the participant completed training, pre-employment skills, or other work plan objectives, though has not entered employment prior to exit.

   *Example: The goal of the program/work plan was to provide financial literacy training, then refer to another grant program for additional employment/training services.*

2. From **Cases > Exit > Exit Program Sequence** within the **Adult Career Pathways Enrolled** sequence.
3. Select **Completed Program Objective** from the dropdown options, then **Next**.

4. On the **Adult Career Pathways Exit** page, enter the required fields (*):
   a. **Exit Date**: the date the participant is exiting from the program. This date may not be after the grant program/funding stream has ended.
   b. **Activities Completion Result**: select whether the specified activity was **Successful** or **Unsuccessful**.
5. If known, enter the optional fields:
   a. **Labor Force Status**: the participant’s employment status at the time of exit. Options include:
      i. **Employed Full-Time**
      ii. **Employed Part-Time**
      iii. **Not in Labor Force**
      iv. **Temporary Employment**
      v. **Unemployed**
   b. **Actual Cost**: the amount paid for the specified activity.

6. Select the **Remove from Caseload** option to remove the participant from your dashboard.

7. Select **Save Final Exit** to complete the closure of the program, or **Save Exit as Pending** to save the exit information without closing the program, or **Cancel** to delete the entry.

**Pending Credential**
1. A **Confirmation** window will appear if a pending credential exits on the program sequence to remind you to enter whether or not the participant received a credential during program participation. Select **Yes** or **No**.
2. At the **Exit Summary** page, select **Cases > Credential** to enter the results of the pending credential.

3. In the **Credential Type** of **Credential Pending**, select **Edit**.

4. Follow the **Credential** instructions to complete the **Credential Summary** page.
Does Not Require Workforce Development Services

1. Use the exit reason of **Does Not Require Workforce Development Services** if the participant was enrolled in the program and is exiting prior to completing any program objectives.

   *Example) entered AmeriCorps, won the lottery.*

2. From **Cases > Exit > Exit Program Sequence** within the **Adult Career Pathways Enrolled** sequence.
3. Select **Does Not Require Workforce Development Services** from the dropdown options, then **Next**.

**Adult Career Pathways Exit**

4. On the **Adult Career Pathways Exit** page, enter the required fields (*):

a. **Exit Date**: the date the participant is exiting from the program. This date may not be after the grant program/funding stream has ended.

b. **Activities Completion Result**: select whether the specified activity was **Successful** or **Unsuccessful**.

c. **Labor Force Status**: the participant’s employment status at the time of exit. Options include:
   i. **Employed Full-Time**
   ii. **Employed Part-Time**
   iii. **Not in Labor Force**
   iv. **Temporary Employment**
   v. **Unemployed**
5. If known, enter the optional fields:
   a. *Actual Cost*: the amount paid for the specified activity.

6. Select the **Remove from Caseload** option to remove the participant from your dashboard.
7. Select **Save Final Exit** to complete the closure of the program, or **Save Exit as Pending** to save the exit information without closing the program, or **Cancel** to delete the entry.

**Pending Credential**

1. A **Confirmation** window will appear if a pending credential exits on the program sequence to remind you to enter whether or not the participant received a credential during program participation. Select **Yes** or **No**.

   ![Confirmation Window](image)

   **Confirmation**

   A pending credential exists for one or more training activities on this record. To enter a credential or indicate that the person did not receive a credential, go to the Credential page after exiting. Do you want to continue?

   ![Yes or No Options](image)

2. At the **Exit Summary** page, select **Cases > Credential** to enter the results of the pending credential.

   ![Exit Summary](image)
3. In the **Credential Type** of Credential Pending, select **Edit**.

4. Follow the **Credential** instructions to complete the **Credential Summary** page.

**Entered Armed Forces**
1. Use the exit reason of **Entered Armed Forces** if the participant has enlisted in a military branch.
2. From **Cases > Exit > Exit Program Sequence** within the **Adult Career Pathways Enrolled** sequence.
3. Select **Entered Armed Forces** from the dropdown options, then **Next**.

**Adult Career Pathways Exit**

Becca Johnson  
Birth Date: 07/13/1989  
Record ID: 202013257  
MAXIS Case: 22335

**Primary Exit Reason:** Entered Armed Forces

4. On the **Adult Career Pathways Exit** page, enter the required fields (*):
   a. **Exit Date**: the date the participant is exiting from the program. This date may not be after the grant program/funding stream has ended.
   b. **Activities Completion Result**: select whether the specified activity was **Successful or Unsuccessful**.
   c. **Labor Force Status**: the participant’s employment status at the time of exit. Options include:
      i. **Employed Full-Time**
      ii. **Employed Part-Time**
      iii. **Temporary Employment**
d. In the Placement Information, select Add New Employer, then Next.

i. Enter the required (*) fields:
   1. Employer Name
   2. Employer Industry (NAICS). Select Search/Validate NAICS.

3. In the NAICS Code Search under keyword or code number, enter National, then Run Search. Select the hyperlink code of 928110 for National Security.
4. **Occupational Title (O*NET).** Select **Search/Validate O*NET.**

5. In the **O*NET Code Search** under **keyword or code number,** enter a description of the participant’s job title, then **Run Search.**

6. Select the hyperlink to the appropriate **Code.**

**ii. Job Sector:** select **Public – Federal**
iii. Job Start Date
iv. Hourly Wage
v. Hours per Week

5. If known, enter the optional fields:
   a. Actual Cost: the amount paid for the specified activity.
   b. Worksite, Employer Contact, Employer E-mail, Address, City, ZIP, County, Country, Phone, Job Title, Job Duration, Benefit Package, Benefit Detail.

6. Select the Remove from Caseload option to remove the participant from your dashboard.

7. Select Save Final Exit to complete the closure of the program, or Save Exit as Pending to save the exit information without closing the program, or Cancel to delete the entry.

Pending Credential
1. A Confirmation window will appear if a pending credential exits on the program sequence to remind you to enter whether or not the participant received a credential during program participation. Select Yes or No.
2. At the **Exit Summary** page, select **Cases > Credential** to enter the results of the pending credential.

3. In the **Credential Type** of **Credential Pending**, select **Edit**.

4. Follow the **Credential** instructions to complete the **Credential Summary** page.
Entered Unsubsidized Employment

1. Use the exit reason of **Entered Unsubsidized Employment** if the participant has entered employment and is no longer in need of program support.

   *Example: The participant has entered employment solely funded by the employer without any wage subsidies.*

2. From Cases > Exit > Exit Program Sequence within the Adult Career Pathways Enrolled sequence.

3. Select **Entered Unsubsidized Employment** from the dropdown options, then Next.
4. On the Adult Career Pathways Exit page, enter the required fields (*):
   a. **Exit Date**: the date the participant is exiting from the program. This date may not be after the grant program/funding stream has ended.
   b. **Activities Completion Result**: select whether the specified activity was **Successful** or **Unsuccessful**.
   c. **Labor Force Status**: the participant’s employment status at the time of exit. Options include:
      i. **Employed Full-Time**
      ii. **Employed Part-Time**
      iii. **Temporary Employment**

d. In the Placement Information, select **Add New Employer**, then **Next**.

   i. Enter the required (*) fields:
      1. **Employer Name**
      2. **Employer Industry (NAICS)**. Select **Search/Validate NAICS**.
3. In the **NAICS Code Search** under **keyword or code number**, enter a description of the participant’s employment industry, then **Run Search**.

   a. Select the hyperlink to the appropriate **Code**.
4. **Occupational Title (O*NET).** Select **Search/Validate O*NET.**

![Occupational Title (O*NET)](image)

5. In the **O*NET Code Search** under **keyword or code number**, enter a description of the participant’s job title, then **Run Search.**

![O*NET Code Search](image)

   a. Select the hyperlink to the appropriate **Code.**

   ![Code](image)

   ii. **Job Sector** select from the options of **Federal Contractor, Private, Public – Federal, or Public – Non-Federal.**

   iii. **Job Start Date**

   iv. **Hourly Wage**

   v. **Hours per Week**

![Job Title](image)
5. If known, enter the optional fields:
   a. *Actual Cost*: the amount paid for the specified activity.
   b. *Worksite, Employer Contact, Employer E-mail, Address, City, ZIP, County, Country, Phone, Job Title, Job Duration, Benefit Package, Benefit Detail*.

6. Select the **Remove from Caseload** option to remove the participant from your dashboard.

7. Select **Save Final Exit** to complete the closure of the program, or **Save Exit as Pending** to save the exit information without closing the program, or **Cancel** to delete the entry.

**Pending Credential**

1. A **Confirmation** window will appear if a pending credential exits on the program sequence to remind you to enter whether or not the participant received a credential during program participation. Select **Yes** or **No**.

2. At the **Exit Summary** page, select **Cases > Credential** to enter the results of the pending credential.
3. In the **Credential Type** of *Credential Pending*, select **Edit**.

4. Follow the **Credential** instructions to complete the **Credential Summary** page.
Family Care Problems

1. Use the exit reason of Family Care Problems if the participant is unable to continue due to a family need which is not related to their own personal/medical problems.

   Example: child/dependent care problems, illness of a family member.

2. From Cases > Exit > Exit Program Sequence within the Adult Career Pathways Enrolled sequence.
3. Select **Family Care Problems** from the dropdown options, then **Next**.

4. On the **Adult Career Pathways Exit** page, enter the required fields (*):
   
a. **Exit Date**: the date the participant is exiting from the program. This date may not be after the grant program/funding stream has ended.
   
b. **Activities Completion Result**: select whether the specified activity was **Successful** or **Unsuccessful**.
   
c. **Labor Force Status**: the participant’s employment status at the time of exit. Options include:
      
i. **Employed Full-Time**
   
ii. **Employed Part-Time**
   
iii. **Not in Labor Force**
   
iv. **Temporary Employment**
   
v. **Unemployed**

5. If known, enter the optional fields:
   
a. **Actual Cost**: the amount paid for the specified activity.
6. Select the **Remove from Caseload** option to remove the participant from your dashboard.

![Remove from caseload](image)

7. Select **Save Final Exit** to complete the closure of the program, or **Save Exit as Pending** to save the exit information without closing the program, or **Cancel** to delete the entry.

![Save Final Exit, Save Exit as Pending, Cancel](image)

**Pending Credential**

1. A **Confirmation** window will appear if a pending credential exits on the program sequence to remind you to enter whether or not the participant received a credential during program participation. Select *Yes* or *No*.

![Confirmation](image)

2. At the **Exit Summary** page, select **Cases > Credential** to enter the results of the pending credential.
3. In the **Credential Type** of *Credential Pending*, select **Edit**.

4. Follow the **Credential** instructions to complete the **Credential Summary** page.
Institutionalized

1. Use the exit reason of Institutionalized if the participant is no longer able to participate in programming due to incarceration in a correctional facility or becoming a resident of an institution which is providing 24 hour support such as a hospital or treatment center.

2. From Cases > Exit > Exit Program Sequence within the Adult Career Pathways Enrolled sequence.
3. Select **Institutionalized** from the dropdown options, then **Next**.

4. On the **Adult Career Pathways Exit** page, enter the required fields (*):
   a. **Exit Date**: the date the participant is exiting from the program. This date may not be after the grant program/funding stream has ended.
   b. **Activities Completion Result**: select whether the specified activity was **Successful** or **Unsuccessful**.
   c. **Labor Force Status**: the participant’s employment status at the time of exit. Options include:
      i. **Not in Labor Force**
      ii. **Unemployed**

5. If known, enter the optional fields:
   a. **Actual Cost**: the amount paid for the specified activity.

6. Select the **Remove from Caseload** option to remove the participant from your dashboard.
7. Select **Save Final Exit** to complete the closure of the program, or **Save Exit as Pending** to save the exit information without closing the program, or **Cancel** to delete the entry.

**Pending Credential**

1. A **Confirmation** window will appear if a pending credential exits on the program sequence to remind you to enter whether or not the participant received a credential during program participation. Select **Yes** or **No**.

2. At the **Exit Summary** page, select **Cases > Credential** to enter the results of the pending credential.
3. In the **Credential Type** of **Credential Pending**, select **Edit**.

4. Follow the **Credential** instructions to complete the **Credential Summary** page.

**Moved from Area**

1. Use the exit reason of **Moved from Area** if the participant is unable to continue due to moving from the service area.

2. From **Cases > Exit > Exit Program Sequence** within the **Adult Career Pathways Enrolled** sequence.
3. Select **Moved from Area** from the dropdown options, then **Next**.

4. On the **Adult Career Pathways Exit** page, enter the required fields (*):
   a. **Exit Date**: the date the participant is exiting from the program. This date may not be after the grant program/funding stream has ended.
   b. **Activities Completion Result**: select whether the specified activity was **Successful** or **Unsuccessful**.
   c. **Labor Force Status**: the participant’s employment status at the time of exit. Options include:
      i. **Employed Full-Time**
      ii. **Employed Part-Time**
      iii. **Not in Labor Force**
      iv. **Temporary Employment**
      v. **Unemployed**
5. If known, enter the optional fields:
   a. *Actual Cost*: the amount paid for the specified activity.

6. Select the **Remove from Caseload** option to remove the participant from your dashboard.

7. Select **Save Final Exit** to complete the closure of the program, or **Save Exit as Pending** to save the exit information without closing the program, or **Cancel** to delete the entry.

**Pending Credential**

1. A **Confirmation** window will appear if a pending credential exits on the program sequence to remind you to enter whether or not the participant received a credential during program participation. Select **Yes** or **No**.
2. At the **Exit Summary** page, select **Cases > Credential** to enter the results of the pending credential.

![Exit Summary Image](image)

3. In the **Credential Type** of **Credential Pending**, select **Edit**.

![Credential Summary Image](image)

4. Follow the **Credential** instructions to complete the **Credential Summary** page.
Other Termination

1. Use the exit reason of **Other Termination** if the participant’s exit reason does not match with any of the other options listed.

2. From **Cases > Exit > Exit Program Sequence** within the **Adult Career Pathways Enrolled** sequence.

3. Select **Other Termination** from the dropdown options, then **Next**.
4. On the Adult Career Pathways Exit page, enter the required fields (*):
   a. **Exit Date**: the date the participant is exiting from the program. This date may not be after the grant program/funding stream has ended.
   b. **Activities Completion Result**: select whether the specified activity was *Successful* or *Unsuccessful*.
   c. **Labor Force Status**: the participant’s employment status at the time of exit. Options include:
      i. *Employed Full-Time*
      ii. *Employed Part-Time*
      iii. *Not in Labor Force*
      iv. *Temporary Employment*
      v. *Unemployed*

5. If known, enter the optional fields:
   a. **Actual Cost**: the amount paid for the specified activity.

6. Select the **Remove from Caseload** option to remove the participant from your dashboard.
7. Select **Save Final Exit** to complete the closure of the program, or **Save Exit as Pending** to save the exit information without closing the program, or **Cancel** to delete the entry.

---

**Pending Credential**

1. A **Confirmation** window will appear if a pending credential exits on the program sequence to remind you to enter whether or not the participant received a credential during program participation. Select **Yes** or **No**.

   **Confirmation**
   
   A pending credential exists for one or more training activities on this record. To enter a credential or indicate that the person did not receive a credential, go to the Credential page after exiting. Do you want to continue?

   **Yes**  **No**

2. At the **Exit Summary** page, select **Cases > Credential** to enter the results of the pending credential.

---

**Exit Summary**

Becca Johnson  
Birth Date 07/13/1989  
Record ID 202013257  
MAXIS Case 22335

- Funding Stream  
- Exit Reason  
- Cannot Locate

**Funding Stream**  
**Exit Reason**  
**Cannot Locate**

**Exit Date** 08/04/2018  
**Start Date** 05/01/2018  
**End Date** 08/04/2018

**View Exit**  **Edit Exit**
3. In the **Credential Type** of **Credential Pending**, select **Edit**.

![Credential Summary](image)

Add Credential

4. Follow the **Credential** instructions to complete the **Credential Summary** page.

![Credential Summary](image)

**Personal/Medical Problem**

1. Use the exit reason of **Personal/Medical Problem** if the participant has their own personal or medical issue preventing them from continuing in the program for more than 90 days.

   *Example: pregnancy, chemical dependency.*

2. From **Cases > Exit > Exit Program Sequence** within the **Adult Career Pathways Enrolled** sequence.
3. Select **Personal/Medical Problem** from the dropdown options, then **Next**.

4. On the **Adult Career Pathways Exit** page, enter the required fields (*):
   a. **Exit Date**: the date the participant is exiting from the program. This date may not be after the grant program/funding stream has ended.
   b. **Activities Completion Result**: select whether the specified activity was **Successful** or **Unsuccessful**.
   c. **Labor Force Status**: the participant’s employment status at the time of exit. Options include:
      i. **Employed Full-Time**
      ii. **Employed Part-Time**
      iii. **Not in Labor Force**
      iv. **Temporary Employment**
      v. **Unemployed**
5. If known, enter the optional fields:
   a. *Actual Cost*: the amount paid for the specified activity.

6. Select the **Remove from Caseload** option to remove the participant from your dashboard.

   ![Remove from caseload]

7. Select **Save Final Exit** to complete the closure of the program, or **Save Exit as Pending** to save the exit information without closing the program, or **Cancel** to delete the entry.

   ![Save Final Exit, Save Exit as Pending, Cancel]

**Pending Credential**

1. A **Confirmation** window will appear if a pending credential exits on the program sequence to remind you to enter whether or not the participant received a credential during program participation. Select **Yes** or **No**.
2. At the Exit Summary page, select Cases > Credential to enter the results of the pending credential.

3. In the Credential Type of Credential Pending, select Edit.

4. Follow the Credential instructions to complete the Credential Summary page.
Program/Type Transfer

1. The Program/Type Transfer exit reason should be used if the grant/funding stream has ended, but the participant will continue receiving services through another funding stream/program within the same organization.
   
   *Example:* They exit from an Adult Career Pathways (ACP) program and will be re-enrolled into a Dislocated Worker (DW) program.

2. From Cases > Exit > Exit Program Sequence within the Adult Career Pathways Enrolled sequence.
3. Select **Program/Type Transfer** from the dropdown options, then **Next**.

**Adult Career Pathways Exit**

Becca Johnson  
Birth Date 07/13/1989  

Program Seq | 1  
Agency: Location | Hennepin County: WERC WSA 09  
Enrollment Date | 04/26/2018  
Entered by | Becca L Johnson  

*Primary Exit Reason: Program/Type Transfer*  

4. On the **Adult Career Pathways Exit** page, enter the required fields (*):  
   a. **Exit Date**: the date the participant is exiting from the program. This date may not be after the grant program/funding stream has ended.  
   b. **Activities Completion Result**: select whether the specified activity was **Successful** or **Unsuccessful**.  
   c. **Labor Force Status**: the participant’s employment status at the time of exit. Options include:  
      i. **Employed Full-Time**  
      ii. **Employed Part-Time**  
      iii. **Not in Labor Force**  
      iv. **Temporary Employment**  
      v. **Unemployed**
5. If known, enter the optional fields:
a. **Actual Cost**: the amount paid for the specified activity.

6. Select the **Remove from Caseload** option to remove the participant from your dashboard.

7. Select **Save Final Exit** to complete the closure of the program, or **Save Exit as Pending** to save the exit information without closing the program, or **Cancel** to delete the entry.

---

**Pending Credential**

1. A **Confirmation** window will appear if a pending credential exits on the program sequence to remind you to enter whether or not the participant received a credential during program participation. Select **Yes** or **No**.
2. At the Exit Summary page, select Cases > Credential to enter the results of the pending credential.

3. In the Credential Type of Credential Pending, select Edit.

4. Follow the Credential instructions to complete the Credential Summary page.
### Refused to Continue

1. Use the exit reason of **Refused to Continue** if the participant is no longer interested in services offered and did not complete program objectives.
   
   *Example: The participant was enrolled in training, then decided it would not work for them.*

2. From **Cases > Exit > Exit Program Sequence** within the **Adult Career Pathways Enrolled** sequence.
3. Select **Refused to Continue** from the dropdown options, then **Next**.

**Adult Career Pathways Exit**

Becca Johnson  
Birth Date 07/13/1989

<table>
<thead>
<tr>
<th>Program Seq</th>
<th>1</th>
</tr>
</thead>
<tbody>
<tr>
<td>Agency: Location</td>
<td>Hennepin County: WERC WSA 09</td>
</tr>
<tr>
<td>Enrollment Date</td>
<td>04/26/2018</td>
</tr>
<tr>
<td>Entered by</td>
<td>Becca L Johnson</td>
</tr>
</tbody>
</table>

**Primary Exit Reason**: Refused to Continue

4. On the **Adult Career Pathways Exit** page, enter the required fields (*):
   a. **Exit Date**: the date the participant is exiting from the program. This date may not be after the grant program/funding stream has ended.
   b. **Activities Completion Result**: select whether the specified activity was **Successful** or **Unsuccessful**.
   c. **Labor Force Status**: the participant’s employment status at the time of exit. Options include:
      i. **Employed Full-Time**
      ii. **Employed Part-Time**
      iii. **Not in Labor Force**
      iv. **Temporary Employment**
      v. **Unemployed**
5. If known, enter the optional fields:
   a. **Actual Cost**: the amount paid for the specified activity.

6. Select the **Remove from Caseload** option to remove the participant from your dashboard.

7. Select **Save Final Exit** to complete the closure of the program, or **Save Exit as Pending** to save the exit information without closing the program, or **Cancel** to delete the entry.

**Pending Credential**
1. A **Confirmation** window will appear if a pending credential exits on the program sequence to remind you to enter whether or not the participant received a credential during program participation. Select **Yes** or **No**.
2. At the **Exit Summary** page, select **Cases > Credential** to enter the results of the pending credential.

3. In the **Credential Type** of **Credential Pending**, select **Edit**.

4. Follow the **Credential** instructions to complete the **Credential Summary** page.
Remained in School

1. Use the exit reason of Remained in School if the participant is enrolled in an education program and no longer requires employment services.

2. From Cases > Exit > Exit Program Sequence within the Adult Career Pathways Enrolled sequence.
3. Select **Remained in School** from the dropdown options, then **Next**.

4. On the **Adult Career Pathways Exit** page, enter the required fields (*):
   a. **Exit Date**: the date the participant is exiting from the program. This date may not be after the grant program/funding stream has ended.
   b. **Activities Completion Result**: select whether the specified activity was **Successful** or **Unsuccessful**.
   c. **Labor Force Status**: the participant’s employment status at the time of exit. Options include:
      i. **Employed Full-Time**
      ii. **Employed Part-Time**
      iii. **Not in Labor Force**
      iv. **Temporary Employment**
      v. **Unemployed**

5. If known, enter the optional fields:
   a. **Actual Cost**: the amount paid for the specified activity.
6. Select the **Remove from Caseload** option to remove the participant from your dashboard.

7. Select **Save Final Exit** to complete the closure of the program, or **Save Exit as Pending** to save the exit information without closing the program, or **Cancel** to delete the entry.

**Pending Credential**

1. A **Confirmation** window will appear if a pending credential exits on the program sequence to remind you to enter whether or not the participant received a credential during program participation. Select **Yes** or **No**.

2. At the **Exit Summary** page, select **Cases > Credential** to enter the results of the pending credential.
3. In the **Credential Type** of *Credential Pending*, select **Edit**.

4. Follow the **Credential** instructions to complete the **Credential Summary** page.
Reservist Called to Active Duty

1. Use the exit reason of **Reservist Called to Active Duty** if the participant is a member of the National Guard or other reserve military unit, and they have been called to active duty for at least 90 days.

2. From **Cases > Exit > Exit Program Sequence** within the **Adult Career Pathways Enrolled** sequence.
3. Select **Reservist Called to Active Duty** from the dropdown options, then **Next**.

4. On the **Adult Career Pathways Exit** page, enter the required fields (*):
   a. **Exit Date**: the date the participant is exiting from the program. This date may not be after the grant program/funding stream has ended.
   b. **Activities Completion Result**: select whether the specified activity was **Successful or Unsuccessful**.
   c. **Labor Force Status**: the participant’s employment status at the time of exit. Options include:
      i. **Employed Full-Time**
      ii. **Employed Part-Time**
      iii. **Temporary Employment**

5. If known, enter the optional fields:
   a. **Actual Cost**: the amount paid for the specified activity.

6. Select the **Remove from Caseload** option to remove the participant from your dashboard.
7. Select **Save Final Exit** to complete the closure of the program, or **Save Exit as Pending** to save the exit information without closing the program, or **Cancel** to delete the entry.

---

**Pending Credential**

1. A **Confirmation** window will appear if a pending credential exists on the program sequence to remind you to enter whether or not the participant received a credential during program participation. Select **Yes** or **No**.

   ![Confirmation Window]

2. At the **Exit Summary** page, select **Cases > Credential** to enter the results of the pending credential.
3. In the Credential Type of Credential Pending, select Edit.

4. Follow the Credential instructions to complete the Credential Summary page.

Exit Reason Definitions
The table below defines the options for closing the participant’s program record. The Exit Reasons marked with an asterisk (*) indicate the participant is not in the labor force for reasons outside of their control; therefore, these exits will not be included in the denominator of training completed, credential attainment, or employment metrics on the Uniform Report Card.

<table>
<thead>
<tr>
<th>Exit Reason</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cannot Locate</td>
<td>The participant has not responded to requests for contact for 90 days (or less, depending on local policy).</td>
</tr>
<tr>
<td>Exit Reason</td>
<td>Definition</td>
</tr>
<tr>
<td>-------------------------------------------------</td>
<td>-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Death*</td>
<td>The participant is deceased.</td>
</tr>
</tbody>
</table>
| Completed Program Objective                      | The participant completed training, pre-employment skills, or other work plan objectives, though has not entered employment prior to exit.  
*Example: The goal of the program/work plan was to provide financial literacy training, then refer the participant to another grant program for additional employment/training services.* |
| Does Not Require Workforce Development Services  | The participant was enrolled in the program and is exiting prior to completing any program objectives.  
*Example: entered AmeriCorps, won the lottery.*                                                                                             |
| Entered Armed Forces                             | The participant has enlisted into the U.S. Military.                                                                                                                                                     |
| Entered Unsubsidized Employment                  | The participant has entered employment and is no longer in need of program support. This employment is solely funded by the employer without any wage subsidies.                                               |
| Family Care Problems*                            | The participant is unable to continue due to a family need which is not related to their own personal/medical problems.  
*Example: child/dependent care problems, illness of a family member.*                                                                         |
| Institutionalized*                               | The participant is no longer able to participate in programming due to incarceration in a correctional facility or becoming a resident of an institution which is providing 24 hour support such as a hospital or treatment center. |
| Moved from Area                                  | The participant is unable to continue due to moving from the service area.                                                                                                                                 |
| Other Termination                                | Participants whose exit reason does not match with any of the other options listed.                                                                                                                    |
| Personal/Medical Problem*                        | The participant has their own personal or medical issue preventing them from continuing in the program for more than 90 days.  
*Example: pregnancy, chemical dependency.*                                                                                                  |
| Program/Type Transfer                            | After the grant/funding stream has ended, the participant will continue receiving services through another funding stream/program within the same organization.  
*Example: They exit from an Adult Career Pathways (ACP) program and will be re-enrolled into a Dislocated Worker (DW) program.*                                                        |
| Refused to Continue                              | The participant is no longer interested in services offered and did not complete program objectives.  
*Example: The participant was enrolled in training, then decided it would not work for them.*                                                  |
<table>
<thead>
<tr>
<th>Exit Reason</th>
<th>Definition</th>
</tr>
</thead>
<tbody>
<tr>
<td>Remained in School</td>
<td>The participant is enrolled in an education program and no longer requires employment services.</td>
</tr>
<tr>
<td>Reservist Called to Active Duty*</td>
<td>As a member of the National Guard or other reserve military unit, the participant has been called to active duty for at least 90 days.</td>
</tr>
</tbody>
</table>

**Co-enrollment**

Leveraging resources from other sources is encouraged; however, all co-enrollment within Adult Career Pathways (ACP) programs must be captured in WorkforceOne (WF1).

Co-enrollment occurs when a participant is receiving program support from multiple funding streams. For example, one grant provides support services while the other grant provides funding for tuition.

At the present time, co-enrollment may only occur within the ACP program when the same provider is administering both programs.

For example, Agency A has two grants: Southeast Asian Economic Relief (SE Asian) and Pathways to Prosperity (P2P). The SE Asian grant will pay for support services such as bus cards, while the P2P grant will pay for tuition. Since Agency A is administering both grants, co-enrollment may occur.

DEED staff are in the process of updating functionality in WF1 to allow co-enrollment between providers administering grants within the ACP program. Until this functionality is implemented, co-enrollment across providers entering data into the ACP program in WF1 may not occur.

For example, Agency A has a Southeast Asian Economic Relief grant (SE Asian) and Agency B has a Pathways to Prosperity (P2P) grant. Since both programs (SE Asian & P2P) enter data into the ACP program and the programs are administered by two different agencies, co-enrollment may not occur.

**Co-enrollment with Same Provider**

At the present time, only one Enrollment sequence for the Adult Career Pathways (ACP) program may be open at a given time. When an organization has more than one funding stream (for example, P2P, MJSP, SE Asian, or WESA) and the participant will be enrolled in more than one funding stream within the same organization, co-enrollment will be recorded via activities.

For example, Agency A has two grants: Southeast Asian Economic Relief (SE Asian) and Pathways to Prosperity (P2P). The SE Asian grant will pay for support services such as bus cards, while the P2P grant will pay for tuition. Since Agency A is administering both grants, co-enrollment may occur.

1. From the Person At-A-Glance page, note that the Adult Career Pathways (ACP) Program is in Enrolled Status.
2. Within the Adult Career Pathways – Enrolled sequence, select Cases > Activity, then Add ACP Activity.
3. Select an **Activity Type** from the dropdown options. Note the [MJSP Funding Restrictions](#) to activities. **Next.**

**Adult Career Pathways Activity**

<table>
<thead>
<tr>
<th>Program Seq</th>
<th>Agency: Location</th>
<th>Enrollment Date</th>
<th>Entered by</th>
<th>*Assign to Staff</th>
<th><strong>Activity Type</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td></td>
<td>04/26/2018</td>
<td>Becca Johnson</td>
<td>Becca L Johnson</td>
<td>None Selected</td>
</tr>
</tbody>
</table>

4. On the **Adult Career Pathways Activity** page, select the appropriate **Funding Stream** from the dropdown options, and complete any other required fields as specified in [Entering Activities](#).
Co-enrollment Across Providers
At the present time, only one Enrollment sequence for the Adult Career Pathways (ACP) program may be open at a given time. When one organization has enrolled a participant into an ACP program in WF1, another organization may not co-enroll the same participant in a different grant/funding stream.

For example, Agency A has a Southeast Asian Economic Relief grant (SE Asian) and Agency B has a Pathways to Prosperity (P2P) grant. Since both programs (SE Asian & P2P) enter data into the ACP program and the programs are administered by two different agencies, co-enrollment may not occur.

1. From the Person At-A-Glance page, note that in this example, the Adult Career Pathways (ACP) Program is in Enrolled Status with Hennepin/Carver (9).

2. Organizations outside of the Hennepin/Carver (9) COFFR (Contract or Federal Funding Recipient) may not co-enroll into another program which enters data into the ACP program in WF1. If a user attempts to add a new ACP Program/New App, the ACP Program will not be an available dropdown option.
   a. If a Hennepin/Carver (9) organization is enrolling into another ACP program, see Co-enrollment with Same Provider.

Appendix A: Pathways to Prosperity (P2P) Additional Information
Minnesota Job Skills Partnership (MJSP) Funding Stream
Select Pathways to Prosperity (P2P) grants receive a portion of their funding from the Minnesota Job Skills Partnership (MJSP), which is set up as a separate funding stream within the Adult Career Pathways (ACP) program in WorkforceOne (WF1). MJSP may only fund a participant’s training if they are at or below 200% of the Federal Poverty Guideline (FPG). Only training activities may be funded by MJSP; please see MJSP Funding Restrictions.
All participants enrolled into the MJSP funding stream in WF1 must have an MJSP Applicant Statement of Income form completed and follow the MJSP Income Eligibility Guidelines. The form and guidelines are available on DEED’s P2P website.

**Review Available Funding Streams**
Funding streams are identified by P2P Model Number, whether it is MJSP or P2P funding, and a Grant Contract Number. Follow the instructions below to identify which program is associated to which funding stream.

1. Select **Manage Program > Funding Streams (Projects)**.

2. In **Funding Stream Category**, select **Adult Career Pathways**.
3. Select your organization’s name in **Agency Associated, Run Search**.

4. In the example below, the organization has 6 different MJSP/P2P **Funding Streams**, all tied to specific **Grant Numbers**.
   a. Grant Number 8EXAMPLE7800 has two funding streams: one for MJSP and one for P2P.
   b. Grant number 8EXAMPLE7801 has two funding streams: one for MJSP and one for P2P.
   c. Grant number 8EXAMPLE7803 has two funding streams: one for MJSP and one for P2P.
Selecting the Appropriate Funding Stream at Initial Enrollment when Opening the Initial Activity

1. The Activity Type options at initial enrollment include Assessment, Career Counseling, Individual Plan Development, and Orientation. Since none of these activities are training activities as identified in MJSP Funding Restrictions, the Funding Stream option chosen must be P2P and cannot be MJSP.

2. Chose the appropriate Funding Stream as per your organization’s internal budgeting procedure. All P2P funding streams begin with “ACP P2P...” and all MJSP funding streams begin with “ACP MJSP...”

3. Enroll.

Selecting the Appropriate Funding Stream when Entering Activities

The Adult Career Pathways Activity page requires the association of a Funding Stream in the Open Activity section.

If the activity will be funded by P2P (Non-MJSP funds), select the funding stream which begins with ACP P2P. If the activity is for training and will be funded by MJSP, select the funding stream which begins with ACP MJSP.
Educational Functioning Level (EFL)/Measurable Skills Gain (MSG)
The Pathways to Prosperity (P2P) program measures Educational Functioning Level (EFL)/Measurable Skills Gains (MSG). DEED staff are in the process of adding the Reporting Collection functionality to the Adult Career Pathways (ACP) program in WF1. This function should be live by October 1, 2018. Please report EFL/MSGs on or after this date.

**Reporting Collection**
Note: this functionality is not yet available in the ACP program in WF1.

1. From **Person-At-A-Glance**, select **Cases > Reporting Collection**.

2. Select **Edit** from the **Action** column within the Adult Career Pathways (ACP) Enrolled Sequence.
3. Select Add New Measurable Skill.

4. Enter the required (*) fields on the Measurable Skill Add/Edit window.
   a. Measurable Skill Type: select Educational Functioning Level.
   b. Attainment Date: enter the date the gain was accomplished as determined by pre- and post-tests.

5. Save Skill.

6. Save the Reporting Collection page.