

## CATAWBA WIA INSTRUCTION NUMBER PY03-03

**TO:** All Py'03 WIA Contractors

**SUBJECT:** Activity Record Revisions

**ISSUANCE DATE:** October 3, 2003

**EFFECTIVE DATE:** October 1, 2003

**EXPIRATION DATE:** Indefinite

Several revisions have been made to Activity Records in VOS. In addition, changes have been made to security levels to provide LWIA VOS Coordinators the ability to make changes/corrections to many items on the Activity Record. The revisions and important reminders have been outlined below.

### **Input of the First Activity Record:**

- Applications more than 90 days old will have to be updated. A warning message appears when this is true. Eligibility staff must request the LWIA VOS Coordinator to check the box "Close Application, Never Enrolled". Once this is done, the eligibility staff may enter a new application for the individual. Then the first Activity Record may be entered.
- If the Applicant's age changes from 17 to 18, 18 to 19, or 21 to 22, you will get a warning message. Since eligibility is based on age at registration, you must update the applicant's program eligibility and applicable verification on the WIA Application and save these changes. Then the first Activity Record may be entered.
- **New Feature-** On save of the first activity, the following warning message appears: "*You are permanently registering this individual in WIA activities-this cannot be removed. Are you sure?*" If you click "OK", the individual will be registered in WIA. If you click "cancel", the individual will not be registered. Please check the name of the individual you are currently serving (in the grey bar on the left of your screen) to be sure you are registering the correct individual. Also check the Registration Date before clicking "OK".
- The Start Date and Registration Date must be equal on the first Activity Record. Therefore, the Start Date is non-selectable on the first activity.
- When you open the first Activity Record, the Registration Date is auto-filled with the System Date. Staff may edit the Registration Date (not more than 15 days prior to the System Date) prior to saving the Activity Record. Once the first Activity Record has been saved, the Registration Date **cannot** be edited.

### **New Features/Reminders for Activity Records:**

- The Actual End Date is a closed field and cannot be selected until after the first save.
- Activity Codes 100-299 have a maximum 90-day life span on the first save. After the first save, staff may edit the Activity Record and save a new Projected End Date.
- Several new Completion Codes have been added.
  - 1=Successful
  - 2=Unsuccessful
  - 3=Dropped Out of Activity
  - 4=Unknown Status
  - 5=Void
- Please note that this new “Void” feature has also been added to allow activity records that never had an “Actual Start Date” to be voided by case managers/staff. **It will still display on the screen as a voided Activity Record, but it will not be counted in performance.** If the activity does have an “Actual Start Date”, local LWIA VOS Coordinators will still be able to void the record. The first activity that is tied to the Registration Date and the last activity that may affect the Exit/Outcome Record **cannot** be voided.

### **Security Changes on the Activity Records:**

Security Levels have been changed to allow LWIA VOS Coordinators more flexibility in making changes to **Activity Records at the local level for participants who have not exited WIA.** These system enhancements should reduce the number of Change Requests that are being sent to the State Administrative Unit for processing. However, contract staff should continue to send change notices to the VOS Coordinators for any change that cannot be made at the contractor level. Due to data validation and monitoring issues, LWIAs will maintain documentation to justify any changes made at the local level. This documentation should also be maintained in the participant file.

The security changes are outlined below:

- The local administrative level may edit Actual and Projected Start and End Dates without the 15-day rules running. However, Registration Date rules are in effect.
- For Open Activities, the local administrative level can change the following:
  1. One-Stop Location
  2. Actual Start Date
  3. Projected Start Date
  4. Projected End Date
- For Closed Activities, the local administrative level can change the following:
  1. One-Stop Location
  2. Actual End Date
  3. Completion Code
  4. Actual Start Date
- Please note that Provider of Services and Program or Course **cannot** be changed because of the relationship to ITA, i.e. funds have been obligated.
- The local administrative level may add Activity Records with any Start Date that does not precede the Registration Date.

**Void Feature for Local Administrative Level:**

- The first Activity Record **cannot** be voided since it established the registration date.
- Activity Records created with **no** actual start date can be voided by either a VOS Coordinator or case manager/staff by selecting void from the completion code drop down box and saving the record. **It will still display on the screen as a voided Activity Record, but it will not be counted in performance.**
- VOS Coordinators **can** void an Activity Record with an Actual Start Date.
- VOS Coordinators **can** void an Activity Record with an Actual End Date

Local VOS Coordinators will review all Activity Record Change Requests and make changes to VOS records when possible. VOS Coordinators will continue to send Activity Record Change Requests for participants who have exited WIA and Change Requests for other VOS data elements that cannot be changed locally to the State Administrative Unit for processing.

Contractors who have questions concerning these changes should contact Phyllis Anderson or Mary Ann McDow at (803) 327-9041.

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Robert A. Barber  
SDA Administrator