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## DIVISION OF WORKFORCE SERVICES ISSUANCE NUMBER PY 19-07, Change 1

November 30, 2020

**FROM:** Charisse Childers, Ph.D., Director

**TO:** Local WIOA Workforce Development Area Administrators/Service Providers

**SUBJECT:** Transactional Services and Activities

1. **Purpose:** To update DWS Issuance 19-07 to:
  - a. Provide updated information regarding transactional services and activities and instructions for entering these services/activities on the Service and Training Plan (S&T) in Arkansas JobLink (AJL),
  - b. To add Individual Employment Plan (IEP) and Individual Service Strategy (ISS) to the list of transactional services/activities, and
  - c. To add updated information concerning case notes.
2. **General Information:** According to the U.S. Department of Labor (DOL), services and activities that last one day, or transactional services/activities, must be entered on the Service and Training Plan (S&T) section of AJL with a start date of the date the service actually began and an end date of the same date.

Services entered incorrectly on the S&T may result in incorrect exit dates, incorrect reporting on the Participant Individual Record Layout (PIRL), and incorrect reporting of after-exit wages and other information for performance indicators.

Transactional services and activities are services and activities that will be opened and closed on the same date. For example, if a transactional service such as Job Referrals is provided 5 times during a month, then it must be entered 5 separate times on the S&T.

To further clarify:

- Job Placement Services, a transactional service, provided on January 8, 2021, must be ended January 8, 2021. If that same service is provided on January 9, 2021 then a new entry must be made on the S&T with a start and end date of January 9, 2021. Each time a transactional service or activity is provided, there must be a new entry on the S&T.

To lessen the case notes burden for these services, case managers may choose to use the Notes Text Box on the Service Page for notes regarding transactional services and activities. Notes entered will automatically be transferred to Program Notes. However, if the case note written in the Service Text Box is to be used for data validation purposes, then a case note must be entered in the Case Notes section of AJL. The reason for this is that a Descriptor field for the case note cannot be accessed when using the Text Box. The Case Notes Descriptor is used to identify that the note is for data validation purposes.

### **Periodic Services/Activities**

Periodic services/activities are services or activities that usually span a period of several days. They must be opened on the date the participant actually began the service/activity and closed on the date the service/activity is actually ended. This does not mean that an activity or service that is normally periodic cannot last for just one day.

**Examples** of periodic services/activities include, but are not limited to:

- Occupational Skills Training
- Work Experience
- Summer Employment Opportunities

### **Transactional Services/Activities**

Most transactional services are one-day services. However, services such as Financial Literacy or Citizenship Training may more than one day, depending on program design. In that case, enter the actual end date of the service or activity.

**Examples** of transactional services/activities include, but are not limited to:

#### **Transactional Services/Activities List for Adult/Dislocated Workers:**

- Career Exploration Services
- Career Guidance
- Comprehensive Assessments
- Eligibility Determination
- Establishing Financial Aid Eligibility Assistance
- Financial Literacy Education
- Group Counseling
- Individual Counseling
- Individual Counseling/Career Planning
- Individual Employment Plan (IEP)
- Information on Available Supportive Services
- Information on Filing Unemployment Claims
- Information on In-Demand Occupations
- Information on Non-Traditional Employment
- Initial Assessment
- Job Development
- Job Referrals
- Job Search and Placement Assistance
- Needs Related Payments
- Out of Area Job Search Assistance
- Outreach, Intake and Orientation
- Performance and Cost Info on Program Providers
- Placed in Federal Training
- Provision of Info on Local Performance
- Provision of Labor Market Information
- Referral to Educational Services

Referral to Federal Training  
Referral to Jobs for Veterans State Grants  
Referral to Partner **Services**  
Referral to Unemployment Insurance Services  
Relocation Assistance  
Supportive Services (all types of supportive services)

- Exception: If it is planned to provide a supportive service continually for a period of time, such as childcare assistance during several weeks of occupational skills training, then it can remain open until the time period has been reached.

Testing  
Workforce Information Services

**Transactional Services/Activities List for Youth:**

Career Development Assistance  
Career Exploration Services  
Citizenship Training  
Civic Engagement Activities  
Community & Service Learning Projects  
Comprehensive Guidance & Counseling  
Eligibility Determination  
Exposure to Postsecondary Educational Opportunities  
Financial Literacy Education  
Group Counseling  
Guidance and Counseling  
Individual Service Strategy (ISS)  
Information on In-Demand Occupations  
Job Placement Services  
Job Readiness  
Job Referrals  
Leadership Development  
Life Skills Workshop  
Objective Assessment  
Peer-Centered Activities  
Referrals to Counseling  
Supportive Services (all)

- Exception: If it is planned to provide a supportive service continually for a period of time, such as childcare assistance during several weeks of occupational skills training, then it can remain open until the time period has been reached.

Training in Decision Making  
Training Organizational & Teamwork  
Transition Services  
Work Readiness/Pre-Employment Skills

3. **Action Required:** Recording Individual Employment Plan (IEP) and Individual Service Strategy (ISS) Transactional Activities on the S&T, as described above, should **begin immediately after the publication of this issuance for participants open on the date of this issuance. Changes must be completed by two weeks after the date of this issuance. Local areas must continue to record other transactional services/activities as required.**

4. Inquiries: Please send questions or comments to [WIOATA@arkansas.gov](mailto:WIOATA@arkansas.gov)
5. Expiration: Ongoing