



*****THIS SESSION IS BEING RECORDED*****

WORKFORCE ONE (WF1)

How to Enroll, Open, and Exit Cases

**Capturing Your RE-ENTRY PILOT
Case Management Details**

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State Program Administrator Coordinator

What's in this Workforce One Guide?

1. How to search for records and/or create a new record in WF1 (Slides 5 – 14)
2. Entering program Application, completing program Eligibility, and Enrolling (Slides 15 – 27)
3. Re-entry participant's Individual Employment Plan requirements (Slides 28 – 35)
4. Case Noting requirements (Slides 36 – 43)
5. Capturing Services/Activities your participant is receiving (Slides 44 – 63)
6. Capturing Measurable Skill Gains and Credentials (Slides 64 – 78)
7. Exiting your Participant from the Program (Slides 79 – 92)
8. Requirements after your participant exits the program (Slides 93 – 100)
9. Samples of available WF1 Reports (Slides 101 – 114)
10. Impacts to Performance (Slides 115 – 121)
11. Performance Information (122 – 133)
12. Additional Guidance Handouts (Slide 134)

ENROLLING PARTICIPANTS

Frequently Asked Questions

What is WF1?

- DEED's case management tracking system. Anything that is not entered in WF1 is not visible to DEED and will not show in official reports as taking place.

When should enrollment in Workforce One happen?

- Immediately after confirming an individual's eligibility for the program
- Prior to applying any funds towards an individual's case

When should I use the top and side panels of WF1?

Top Panel: NOT case specific. Direct your questions about this panel to Amy Carlson at DEED: amy.carlson@state.mn.us

Side Panel: Case specific. Use to navigate through a participant's record and perform case management data entry requirements

THE HELP BUTTON IN THE TOP PANEL



If you are ever unsure of what type of information needs to be entered on any page and any field of WF1

- Click on “Help”
- Every page in WF1 has a “Help” feature that explains and defines everything within the current WF1 screen you are in

PARTICIPANT RECORD SEARCH

Person Search

▼ Hide Search Criteria

| | |
|----------------|--|
| Last Name | <input type="text"/> |
| First Name | <input type="text"/> |
| Middle Initial | <input type="text"/> |
| SSN | <input type="text" value="548-92-3455"/> |
| Record ID | <input type="text"/> |
| MAXIS Case | <input type="text"/> |
| E-mail | <input type="text"/> |
| Staff Assigned | <input type="text" value="All Values"/> |

- Log into WF1
- Click on “Search” in the top panel
- Select “Person” from the drop-down list
- Enter the participant’s Social Security Number in the “SSN” field
- Click on “Run Search”

PARTICIPANT RECORD SEARCH

If search results are found, click on the individual's name.
(Skip to page 14)

Person Search

▼ Show Search Criteria

▼ Hide Search Results

Show 25 100 200 500
Displaying 1 to 1 of 1

| Name: Birth Date ▼ | SSN | Record ID | MAXIS Case | MAXIS PMI | City | Current Staff Assigned |
|-----------------------------|------|-----------|------------|-----------|-------|---------------------------------------|
| Jones, John H 05/05/1955 | 3455 | 100002910 | | | Eagan | Bendewald, Jennifer E Carlson, Amy |

PARTICIPANT RECORD SEARCH

The screenshot shows a web interface titled "Person Search". At the top left, the title "Person Search" is displayed in blue. Below the title, there are two expandable sections: "Show Search Criteria" and "Hide Search Results", both with a downward-pointing triangle icon. The main content area displays the text "No results found." Below this text, there are three buttons: "New Search", "Refine Search", and "Add New Person".

- If you receive a message that says “No results found” this means the individual has never been case managed in a program using WF1
- Click on “Add New Person” to create a new shell record (Skip to page 13)

Risks of Using a Pseudo SSN

- Post program earnings will not be determined, which will result in an automatic negative exit.
- The search function in Workforce One encompasses many parameters: SSN, name, email address, MAXIS number and Workforce One Record ID or Birthdate. If a pseudo-SSN is used, a later search for the person by SSN may not yield a result.

Procedure for Creating a Pseudo SSN

If an individual refuses to supply an SSN and/or adequate documentation, then enter a 9-digit number based on this method:

- Start the number with "000" or "900"
- Middle two numbers are the WSA /ISP number = AEOA – 21
- Last 4 numbers are assigned in a sequential manner (ie, 0001, 0002, 0003, etc)

ADDING A NEW PERSON RECORD

Person Add

SSN **SSN Verified**

***Last Name** ***First Name** **MI**

Birth Date

***Address1**

Address2

***City** ***State** ***Zip**

***County** ***Country**

| Phone | Ext. | Phone Type | If other, please specify: | TTY | Video |
|---|----------------------|--|---------------------------|--------------------------|--------------------------|
| <input type="text" value="(555) 555-5555"/> | <input type="text"/> | <input type="text" value="Cell"/> | <input type="text"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| <input type="text"/> | <input type="text"/> | <input type="text" value="None Selected"/> | <input type="text"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| <input type="text"/> | <input type="text"/> | <input type="text" value="None Selected"/> | <input type="text"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| <input type="text"/> | <input type="text"/> | <input type="text" value="None Selected"/> | <input type="text"/> | <input type="checkbox"/> | <input type="checkbox"/> |

Primary E-mail

Secondary E-mail

***Veteran Status**

***Citizen/Right to Work**

- To ensure accurate and complete case management reports **Always enter as much information as you can, even if the data entry is not required**
- Fields with an asterisk (*) mean data entry is required
- Click "Save"

ADDING A NEW PERSON RECORD

Contact Information

John H Jones
Birth Date 05/05/1955

Record ID 10002910

*Last Name Jones *First Name John MI H
Alias Last Alias First Alias MI

| Phone | Ext. | Phone Type | If other, please specify: | TTY | Video |
|----------------|------|---------------|---------------------------|--------------------------|--------------------------|
| (555) 555-5555 | | Cell | | <input type="checkbox"/> | <input type="checkbox"/> |
| | | None Selected | | <input type="checkbox"/> | <input type="checkbox"/> |
| | | None Selected | | <input type="checkbox"/> | <input type="checkbox"/> |
| | | None Selected | | <input type="checkbox"/> | <input type="checkbox"/> |

Primary E-mail JJ@gmail.com
Secondary E-mail

Residential Address

*Address1 111 1st Street N
Address2
*City Eagan *State Minnesota *Zip 55121
*County Dakota *Country United States

Last Address Moved Date 03/23/1998



The individual is now assigned a WF1 ID number

- This number will be used as an ID instead of SSN
- Continue filling in data in any areas you have information on that are still blank

ADDING A NEW PERSON RECORD

Mailing address same as residential address

Mailing Address

*Address1

Address2

*City *State *Zip

*Country

▼ Hide **Alternate Contact List**

No alternate contacts.

Click on “Add alternate contacts” and enter the contact information for the person your participant provides you that:

- Does not live with them
- Will be able to assist you in locating them if their contact information unexpectedly changes

ADDING A NEW PERSON RECORD

Alternate Contact Add

John H Jones

Record ID 100002910

Birth Date 05/05/1955

*Contact Type

Alternate

*Last Name

Smith

*First Name

Marcy

MI

Address1

55 2nd St N

Address2

City

Eagan

State

Minnesota

Zip

55121

Country

United States

Phone

Ext.

Phone Type

If other, please specify:

TTY

Video

(555) 999-8888

Cell

None Selected

None Selected

None Selected

Alternate Contact E-mail

marcys@gmail.com

Save

Cancel

- Enter as much contact information your participant can provide
- This information will only be used if you are unable to reach your participant at the phone number, address, or email they provided you
- Click on "Save"

ADDING A NEW PERSON RECORD

▼ Hide Alternate Contact List

Edit Delete

Name: Marcy Smith

Type: Alternate

Address: 55 2nd St N
 Eagan, Minnesota 55121

Phones: 555-999-8888 Cell

E-mail: marcys@gmail.com

Add Alternate Contact

Save Cancel

- Click “Save”
- This means a shell record is now entered for this individual in WF1
- **This person is not yet enrolled in a program**

NEW PROGRAM APPLICATION

Home Search ▶ My Tasks ▶ Recent Work Manage Program ▶ References ▶ Resources ▶ Help

General

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

Case Note

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

Cases

- Program/New App** ← 1
- Eligibility/Enrollment
- Activity

Program Summary

John H Jones Record ID 100002910
Birth Date 05/05/1955

Add New Application ← 2


No program sequences to display.

1. Select “Program/New App” in the side panel
2. Click on “Add New Application”

NEW PROGRAM APPLICATION

Step: **1. Application** 2. Eligibility 3. Enrollment

***Program** Dislocated Worker ▼

***Application Date** 01/15/2023 

Agency Anoka County Job Training Center

COFFR Anoka County - LWDA 12

Location Anoka

Service Model None Selected ▼

Primary Staff Carlson, Amy ▼

Support Staff Johnson, Becca ▼

Send Tickler

▼ Hide Case Note

Assessment completed.
Participant was confirmed eligible.
Counselor is assisting participant with creating their IEP.

Continue to Eligibility Save and Exit Wizard Cancel

- Program name: Dislocated Worker (DW)
- Application Date: Date they signed their DW application
- Primary Staff: Assigned Counselor
- Support Staff: Person who will also be entering data on the case or coverage for Primary
- Enter a case note
- Press “Continue to Eligibility”







PROGRAM ELIGIBILITY

Dislocated Worker Eligibility

John H Jones Record ID 202016427
Birth Date 05/05/1957

Step: 1. Application **2. Eligibility** 3. Enrollment

Program Seq 1
Agency: Location Anoka County Job Training Center: Anoka
Entered by Amy Carlson
Application Date 01/15/2023

***Decision Date** 01/15/2023 
***SSN** 231-65-4864
***Birth Date** 05/05/1957 **Age** 65
***Gender** Male 
***Citizen/Right to Work** Citizen 
***Selective Service Registration** Not Applicable  [Register for Selective Service](#) 
***Basis for Eligibility** Separated from Employment 

- Enter information within all fields. Some information will auto populate from screens you have already completed
- Click the blue link to search for a Selective Service registration. If not registered, select “Not Applicable”
- Basis for Eligibility for Re-entry participants “Separated from Employment”
- Press “Next”

PROGRAM ELIGIBILITY

Change Basis for Eligibility

Specific Eligibility Criteria: Separated from Employment

| | |
|---|---------------------------------|
| *Trade Adjustment Assistance Co-Enrollment | No ▼ |
| *Separated from Employment | Yes ▼ |
| *Actual/Projected Separation Date | 09/25/2010 |
| *Received Layoff Notice | No ▼ |
| Date Received Layoff Notice | <input type="text"/> |
| *Mass Layoff | No ▼ |
| *Permanent Plant Closure | No ▼ |
| *Public Announcement of Closure in 180 days or less | No ▼ |
| *Separated from Self-Employment | No ▼ |
| *Resident of MN at Employment Separation | No ▼ |
| *Working in MN at Employment Separation | Yes ▼ |
| *Attachment to the Labor Force | No ▼ |
| *Limited Reemployment Opportunities | Yes ▼ |
| *Unlikely to Return to Previous Occupation | Yes ▼ |
| *Unemployed as Result of General Economic Conditions | No ▼ |
| *Weeks Unemployed in Last 52 | <input type="text" value="52"/> |
| *Unemployed for the Last 27 Consecutive Weeks | Yes ▼ |
| *Eligible for or Exhausted Unemployment Benefits | No ▼ |

- Answer all questions using the participants information provided in their application
- Fields with an asterisk (*) mean data entry is required
- Most Re-entry grant participants will be enrolled as “Long-term Unemployed”, which means they have been unemployed for 15 weeks or longer
- Contact your manager or Amy Carlson if you have questions on the Basis for Eligibility

PROGRAM ELIGIBILITY

Specific Eligibility Criteria: Priority of Service

Meets Local Priority of Service

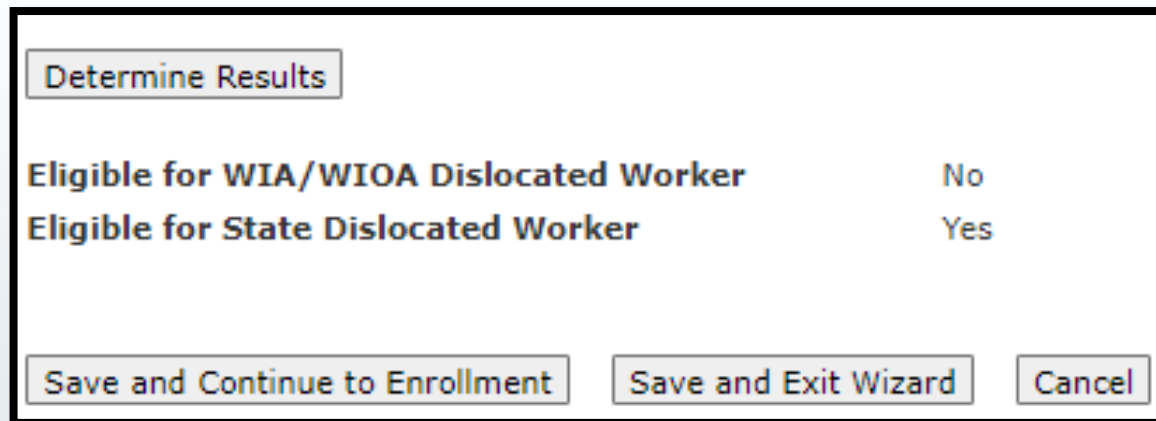
Justification for Meeting Local Priority of Service

Re-entry Pilot Competitive Grant

Spell Check

- Select “YES” for “Meets Local Priority of Service”
- Your justification for Priority of Service is “Re-entry Pilot Competitive Grant”

PROGRAM ELIGIBILITY



| | | |
|---|----------------------|--------|
| Determine Results | | |
| Eligible for WIA/WIOA Dislocated Worker | No | |
| Eligible for State Dislocated Worker | Yes | |
| Save and Continue to Enrollment | Save and Exit Wizard | Cancel |

- Determination Results should appear as “Eligible” for State Dislocated Worker
- If the determination shows “No” for State Dislocated Worker, look back at your data entry to confirm it was all entered correctly
- If nothing appears to be incorrect, contact your manager or Amy.Carlson@state.mn.us for guidance
- Click on “Save and Continue to Enrollment”

PROGRAM ENROLLMENT

Step: 1. Application 2. Eligibility **3. Enrollment**

Program Seq 1

Agency: Location Anoka County Job Training Center: Anoka

Entered by Amy Carlson Last Updated by Amy Carlson

Application Date 01/15/2023 Decision Date 01/15/2023

*Enrollment Date 01/15/2023

*Primary Staff Carlson, Amy

SSN 231-65-4864

*Last Name Jones *First Name John MI H

*Birth Date 05/05/1957 Age 65

*Address 1 111 1st Stree

Address 2

*City Eagan *State MN *Zip 55121

*County Dakota *Country United States

| Phone | Ext. | Phone Type | If other, please specify: | TTY | Video |
|----------------|------|---------------|---------------------------|--------------------------|--------------------------|
| (651) 333-3333 | | Cell | | <input type="checkbox"/> | <input type="checkbox"/> |
| | | None Selected | | <input type="checkbox"/> | <input type="checkbox"/> |
| | | None Selected | | <input type="checkbox"/> | <input type="checkbox"/> |
| | | None Selected | | <input type="checkbox"/> | <input type="checkbox"/> |

OK with receiving text messages Yes

E-mail J.Jones@gmail.com E-mail Type Personal 1

None Selected

- Enter data into all blank fields
- Use participant's self-reported information from their application to capture demographic details
- Continue through the enrollment screen by scrolling down

ENROLLING PARTICIPANTS

| | |
|--|--|
| *Ethnicity - Hispanic or Latino | Person is Hispanic or Latino ▼ |
| *Race | |
| <input type="checkbox"/> American Indian or Alaska Native | <input type="checkbox"/> Asian |
| <input type="checkbox"/> Black or African American | <input type="checkbox"/> Did Not Self-Identify |
| <input type="checkbox"/> Hawaiian Native/Pacific Islander | <input checked="" type="checkbox"/> White |
| Immigrant or Refugee | No ▼ |
| Country of Origin | United States |
| *Referred from Wagner Peyser | No ▼ |
| *Limited English Proficiency | No ▼ |
| Primary Language | English ▼ |
| *Veteran Status | Not a Veteran |
| *Highest Level of Education | 9th Grade Education |
| *Pre-Enrollment Education Status | Not Attending: H.S. Dropout ▼ |
| English Reading Skills Grade Level | 6 |
| Math Skills Grade Level | 5 |
| *Basic Skills Deficient | Yes ▼ |
| *Participating in a Registered Apprenticeship Program | No ▼ |

- Continue Enter data into all blank fields
- The more information you enter at enrollment, the better your grant reports

ENROLLING PARTICIPANTS

| | |
|--------------------------------------|---------------------|
| *Family Status | Other Family Member |
| Eligible Family Size | 1 |
| Actual Family Size | 1 |
| Dependents Under 18 Years | 0 |
| Annual Family Income | \$ 0.00 |
| *SSI Recipient | No |
| *SSDI Recipient | No |
| *TANF/MFIP Recipient | No |
| *SNAP Recipient | No |
| *General Assistance Recipient | No |
| *Refugee Assistance Recipient | No |
| *Disability Status | Not Disabled |
| *Homeless | No |
| *Offender | Yes |
| *WDA Barrier to Employment | Yes |

- Continue completing all fields if the information is known
- The more information you enter at enrollment, the better your grant reports will be
- “Other Family Member” means single with no kids

ENROLLING PARTICIPANTS

| | | |
|---|---|--------------------------------------|
| *Labor Force Status | Not in Labor Force | |
| *Layoff Related to COVID-19 | No <input type="button" value="v"/> | |
| *Layoff Related to Civil Unrest | No <input type="button" value="v"/> | |
| *Migrant Status | No | |
| Does the person, friends, or any family member have opioid use history? | Yes <input type="button" value="v"/> | |
| Is transitioning into a profession that could impact the opioid crisis? | No <input type="button" value="v"/> | |
| *UI Benefit Status | Neither Claimant nor Exhaustee <input type="button" value="v"/> | |
| Hourly Wage of Interim Job | \$ <input type="text" value=""/> | <input type="checkbox"/> Undisclosed |
| *Received WF Info Serv | Yes <input type="button" value="v"/> | |
| *WF Profiling Reemp Serv | No <input type="button" value="v"/> | |
| *Rcvd. Rapid Response Services | Yes <input type="button" value="v"/> | |
| *Actual Separation Date | 09/25/2010 <input type="button" value="calendar"/> | |
| *Employer at Separation | <input checked="" type="radio"/> Employer Not Listed | |
| *Months Empl. in Separated Occ. | <input type="text" value="20"/> | |
| *Hourly Wage of Separated Job | \$ <input type="text" value="15.00"/> | <input type="checkbox"/> Undisclosed |
| Separated Job Occ. Code (O*NET) | <input type="text" value="47-2061.00"/> - Construction Laborers | |
| | <i>Clear O*NET code for new search.</i> | |
| | <input type="button" value="Search/Validate O*NET"/> | |

- Continue completing all fields. Fields with an asterisk are required
- The more information you enter at enrollment, the better your grant reports
- Separated Job Occ. Code (O*NET), click “Search/Validate O*NET” to search for the code related to their previous occupation

ENROLLING PARTICIPANTS

| | |
|---------------------------------------|--|
| Separated Job Industry (NAICS) | <input type="text" value="238160"/> - Roofing Contractors <i>Clear NAICS code for new search.</i> <input type="button" value="Search/Validate NAICS"/> |
| Wage Detail Consent Given | <input type="text" value="Yes"/> |
| Effective Date | <input type="text" value="01/15/2023"/> |
| Open Initial Activity | |
| Activity Type | <input type="text" value="Staff Assisted Assessment"/> |
| Activity Subtype | <input type="text"/> |
| Funding Stream | <input type="text" value="Anoka Re-Entry Pilot DW Competitive 99999"/> |
| Estimated End Date | <input type="text"/> |
| Estimated Hours | <input type="text"/> |
| Case Note | <input type="text" value="Participant confirmed eligible for Re-Entry Pilot Program. Continuing assessment of marketable needs/training availability"/> |
| | <input type="button" value="Spell Check"/> |
| | <input type="button" value="Enroll"/> <input type="button" value="Enroll and Add Another Activity"/> <input type="button" value="Save without Enrolling"/> <input type="button" value="Cancel"/> |

- “Staff Assisted Assessment” is the first “Activity Type” since it determines the participant’s eligibility
- FUNDING STREAM: Select the funding stream titled with your agency’s Re-Entry Pilot DW Competitive grant
- Click “Enroll” (See slide 27 for important Info to know before clicking this!)

The participant is now enrolled!

Home Search ▶ My Tasks ▶ Recent Work Manage Case ▶ Manage Program ▶ Reports References ▶ Resources ▶ Help

General ✔ Enrollment saved.

- At-A-Glance
- Contact
- Tickler
- Connect Messages
- Demographics
- Mobile User
- Work Preferences
- MN Works Resume

Case Note

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

Cases

- Program/New App
- Eligibility/Enrollment**
- Activity

Eligibility/Enrollment Summary

John H Jones Record ID 202016427
Birth Date 05/05/1957

▼ Hide Dislocated Worker Seq 1 - Enrolled

| | |
|---------------------------------------|------------------------|
| Eligibility/Determination Date | 01/15/2023 |
| Eligibility Agency | Anoka Cty JTC |
| Enrollment Date | 01/15/2023 |
| Enrollment Agency | Anoka Cty JTC |
| COFFR | Anoka County - LWDA 12 |
| Exit Date | |
| Enrollment Envelope Status | |

IMPORTANT

IMPORTANT INFORMATION TO KNOW

Clicking the “Enroll” button means

You are committed to case managing the participant

All the way to program exit

Deleting Program Enrollments

Is Disallowed

Individualized Employment Plans (IEP)

100% of Re-entry Participants MUST have an IEP

1. Participant IEPs are developed with the participant by their case manager
2. IEPs must be signed/dated by the participant and case manager
3. Participants must receive a copy of their IEP
4. IEPs must be specific to each participant and include all requirements listed in the IEP policy located here
<https://apps.deed.state.mn.us/ddp/PolicyDetail.aspx?pol=411>
5. IEPs are living documents that need to be updated as goals are achieved, situations change, new barriers are discovered, etc.
6. IEPs must be in place before any service can be provided to the participant
7. The second activity on the case record is “Individualized Employment Plan”

ONLINE EMPLOYMENT PLAN

Multiple options that can be included within the plan; these are the most common

[See the IEP Policy for requirements](#)

<https://apps.deed.state.mn.us/ddp/PolicyDetail.aspx?pol=411>

Dislocated Worker Employment Plan

| | | | |
|--|--|---------------------------------------|---------------------------------------|
| Name | John H Jones | Record ID | 100002486 |
| Start Date | 06/10/2016 | Review Date | 06/10/2017 |
| ACTIVITY | | Assessment | |
| Start By | 06/10/2016 | Expected Completion By | 06/10/2017 |
| John H Jones: Action Steps | | | |
| <ul style="list-style-type: none"> TABE (7-8, 9-10): 6th grade Math/7th grade English | | | |
| Comments | Scored in the 7th grade level in English and 6th grade level in Math | | |
| ACTIVITY | | Barriers | |
| Start By | 01/12/2015 | Expected Completion By | 06/10/2017 |
| John H Jones: Action Steps | | | |
| <ul style="list-style-type: none"> Limited English: Participant will attend ABE to improve English Skills. | | | |
| ACTIVITY | | Child Care | |
| Start By | 06/10/2016 | Expected Completion By | 06/10/2017 |
| John H Jones: Action Steps | | | |
| <ul style="list-style-type: none"> Look for and get child care by Immediately. | | | |
| ACTIVITY | | Employment | |
| Start By | 06/10/2016 | Expected Completion By | 06/10/2017 |
| John H Jones: Action Steps | | | |
| <ul style="list-style-type: none"> Attend local networking groups As advertised by counselor. Complete and submit cover letter to job counselor/case manager. Complete and submit resume to job counselor/case manager. Must maintain regular contact with my job counselor/case manager. Post complete resume on MinnesotaWorks.net. Regularly check newspapers and other websites for new job openings. Regularly search MinnesotaWorks.net for job leads. Start job search by 01/12/2015. | | | |
| ACTIVITY | | I understand that or agree to: | |
| Start By | 06/10/2016 | Expected Completion By | 06/10/2017 |
| John H Jones: Action Steps | | | |
| <ul style="list-style-type: none"> Demand for services and budget changes may affect funding availability. | | | |
| Name: | John H Jones | Page 1 of 3 | Run Time: 1/13/2015 2:36:47 PM |
| Record ID: | 100002486 | | |

ONLINE EMPLOYMENT PLAN

Dislocated Worker Employment Plan

- Failure to comply with the above plan may be grounds for termination of services.
- I will maintain 30-day contact with my job counselor/case manager, either through telephone or e-mail.
- My employment plan will be revised when my job counselor/case manager and I agree to the change.
- Notify job counselor/case manager of changes in address, phone, or situation.
- Provide an emergency contact that does not live with me whom we may contact in the event that you are unreachable or unresponsive to our request to reach you.
- Respond promptly to e-mails, calls, or letters from my job counselor/case manager.
- Stay actively enrolled in program.
- To cooperate with post-placement follow-up.
- To let my counselor know when I start working including: employer name, address, job title, starting date and wages, number of hours a week and whether I am eligible for health benefits.
- Work toward successfully completing my goals.

| ACTIVITY | Support Services |
|----------|------------------|
|----------|------------------|

| | | | |
|----------|------------|------------------------|------------|
| Start By | 06/10/2016 | Expected Completion By | 06/10/2017 |
|----------|------------|------------------------|------------|

John H Jones Action Steps

- Child/family care: When daycare is found, provide information to counselor to discuss assistance with fees.

| ACTIVITY | Training |
|----------|----------|
|----------|----------|

| | | | |
|----------|------------|------------------------|------------|
| Start By | 06/10/2016 | Expected Completion By | 06/10/2017 |
|----------|------------|------------------------|------------|

John H Jones Action Steps

- Agree to return any books, tools, or supplies purchased on my behalf for any class that isn't completed.
- Apply for all applicable financial aid, which includes Pell.
- Attend ABE classes to At least 10 hours per week.
- Attend all scheduled classes.
- Attend orientation/registration at chosen institution.
- Call my job counselor/case manager within 1 week days and meet to write a new employment plan if my training ends.
- Discuss any changes in my education plan with my job counselor/case manager BEFORE changing plans.
- Maintain regular contact with my job counselor/case manager.
- Make satisfactory progress toward completion and remain in good standing with the institution.
- Must maintain satisfactory progress.
- Notify job counselor/case manager immediately if training will not be completed within the expected timeline.
- Provide a copy of certificate/diploma/degree at completion and meet with job counselor/case manager to update my plan.
- Search for a full-time job at the end of my training.
- Submit financial aid award letters, class schedule, grades, and fee statement Within 1 week of receiving them.
- Submit progress reports by When grades are issued.

Name: John H Jones

Page 2 of 3

Run Time: 1/13/2015 2:36:47 PM

Record ID: 100002486

[See the IEP Policy for requirements](#)

<https://apps.deed.state.mn.us/ddp/PolicyDetail.aspx?pol=411>

ONLINE EMPLOYMENT PLAN

**Job Counselor/
Case Manager** Amy Carlson
(651) 259-7542 (Primary)
amy.carlson@state.mn.us

Service Location Anoka County Job Training Center: Anoka

Client Signature: _____ **Date** _____

**Job Counselor/Case Manager
Signature:** _____ **Date** _____

**Others Involved in Plan
Development Signature:** _____ **Date** _____

- Make sure to print the entire document
- Counselor and Participant both need to sign the IEP before it is official
- Give a signed copy to the participant
- Put a signed copy in the case file
- Only valid without update for one year

Name: John H Jones

Page 3 of 3

Run Time: 1/13/2015 2:36:47 PM

Record ID: 100002486

Individual Employment Plan (IEP) Requirement

- An annual review must occur between 335 – 395 days after the most recent signatures date
- Since the IEP is a living document it must be updated whenever
 - An Obstacle or Barrier has been overcome
 - Goals/Objectives are achieved
 - Situations/Life changes

Individual Employment Plan (IEP) Requirement

WORKFORCE ONE

Home Search ▶ My Tasks ▶ Recent Work Manage Program ▶ Rep

General

At-A-Glance

- Contact
- Tickler
- Demographics
- Work Preferences
- MN Works Resume

Case Note

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

Cases

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

Person At-A-Glance

Lemon M Ade
Birth Date 05/05/1967

Name and Mailing Address

Lemon M Ade
5615 Golden Valley Road
Golden Valley MN 55422
The geo-coding search has successfully verified t

| Phone | Ext. | Phone Type | TTY | Video |
|--------------|------|------------|-----|-------|
| 999-999-9999 | | Cell | No | No |

Birth Date 05/05/1967

Primary E-mail

Secondary E-mail

Record ID 100002632

| Program | Status | Application Date | Enroll Date |
|---------|--------|------------------|-------------|
|---------|--------|------------------|-------------|

Must be captured on the participant's WF1 record with a plan approval date before any financials can be expended on the case.

1. You can use the WF1 online plan or
2. A paper IEP template your agency creates that can be modified to capture participant specific information

Individual Employment Plan (IEP) Requirement

WORKFORCE ONE

Home Search ▶ My Tasks ▶ Recent Work Manage Case ▶ Manage Program ▶ Reports Refer

General

At-A-Glance
Contact
Tickler
Connect Messages
Demographics
Mobile User
Work Preferences
MN Works Resume

Case Note

Add Case Note
Case Note Quick

Dislocated Worker Employment Plan

Jack Frost
Birth Date 05/05/1958 Age 64

Program Seq 1
Agency: Location Anoka County Job Training Center: Anoka
Entered by Amy Carlson
Staff Assigned Amy Carlson

***Plan Mode**

Plan Template

None Selected ▼
None Selected to populate. ▼
Online
Paper

Save and Continue Cancel

1. Select the type of IEP used for the participant
 - Online = WF1 generated IEP was used
 - Paper = Agency created IEP template was used
2. Click “Save and Continue”

Individual Employment Plan (IEP) Requirement

Case Note Quick
Case Note Search
Case Alert

Cases

Program/New App
Eligibility/Enrollment
Activity
TAA

Plan

Credential
Measurable Skills Gain
Reporting Collection
Youth Performance

Case Manager met with participant to complete his IEP. IEP signed, dated, original placed in case file, copy uploaded to case record using EDS, and a copy was provided to the participant.

Spell Check

Plan Status: Pending

*Start Date: 04/24/2023

Review Date: 04/23/2024

*Confirmation Date: 04/24/2023

Save and Activate Save as Pending Delete Pending Plan

1. Enter a case note explaining the IEP status and where it can be located.
2. Confirm the “Start Date”, which is the plan’s start date
3. Confirm the “Review Date” is one year in the future from the Start Date
4. Enter the “Confirmation Date”, which is the latest dated of signature
5. Click “Save and Activate”

CASE NOTES

100% of all Re-entry grant participants

MUST HAVE

**thorough case notes entered in WF1
throughout their case management period**

What Should be Case Noted?

- The date and manner of the contact
- Details of significant events impacting the customer's participation
- IEP activities and progress toward goals, including updates and changes in this living document
- Participation in associated programs or activities
(e.g. Veterans Program, State Services for the Blind, Trade Adjustment Assistance, Vocational Rehabilitation, etc.)

What Should be Case Noted?

- Information provided verbally by service providers about the customer's participation or progress
- Purpose of the contact, information provided, description of outcomes, and next steps
- Information on contacts with other program staff
- All Support Service and Training fund approvals
 - Documentation for each disbursement must be included, including cost to provider (not value of service)
 - Documentation must show how approval was consistent with local policy

Communication and Contact

How often do you need to communicate with your participant?

- Counselor needs to attempt communication with their participant at least every 30 days
- Counselor needs to case note in the participant's Workforce One record at least every 30 days detailing the attempt to communicate
- If no live contact has occurred for 90 consecutive days, the counselor **MUST** exit the participant

Case Noting

General

- At-A-Glance
- Contact
- Tickler
- Connect Messages
- Demographics
- Mobile User
- Work Preferences
- MN Works Resume

Case Note

- Add Case Note**

Case Note Add

Jack Frost
Birth Date 05/05/1958 Age 64

***Event Date**

***Note Viewable By**

Agency Anoka County Job Training Center

***Program**

[Select/Deselect](#)

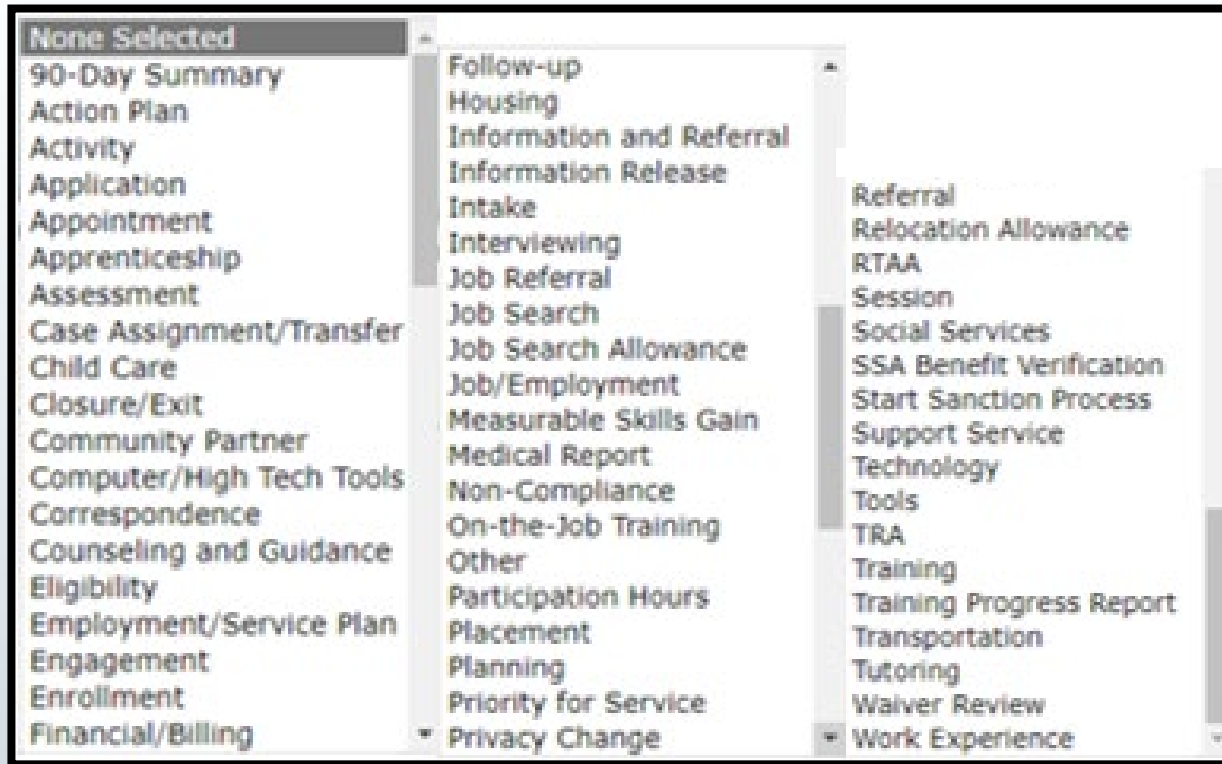
Staff Associated

Category

[Select/Deselect](#)

- Click on “Add Case Note” in the side panel of the case record
- Fill in as many data elements as you can. Fields with an asterisks are required
- Enter a thorough case note

Case Noting



- Best practice is for each agency to set up their own definitions for case note categories so their case managers understand when to use them
- This allows their managers to find the number of participants who are communicating about certain situations better

Case Noting

| |
|-----------------------|
| None Selected |
| E-mail |
| FAX |
| In Person - Community |
| In Person - Home |
| In Person - Office |
| In Person - Other |
| In Person - School |
| Letter |
| Other |
| Phone |
| Social Media |
| Text |
| Video |
| WF1 Connect |

| | | |
|------------------------|-------------------------|---------------------------------|
| MN Works Resume | Staff Associated | Carlson, Amy |
| Case Note | Category | None Selected |
| Add Case Note | | Select/Deselect |
| Case Note Quick | Contact Method | None Selected |
| Case Note Search | *Contact Type | None Selected |
| Case Alert | *Status | None Selected |
| Cases | Subject | Attempted to Contact Person |
| Program/New App | | Does Not Involve Person Contact |
| Eligibility/Enrollment | | Live Contact with Person |
| | | Third Party Contact |

- Select the method of communication and Contact Type
- Contact types are used for statewide purging of dead cases. This means, if you have Live Contact with your participant, that should be selected appropriately.
- This is a monitored element

Definition of LIVE CONTACT

One-to-one contact between the provider's staff and the participant
<https://apps.deed.state.mn.us/ddp/PolicyDetail.aspx?pol=520>

- In-person conversation
- Telephone conversation (or voicemail from participant)
- Electronic message including email, text message (SMS), instant message (IM), or message sent via social media (e.g. Facebook, Twitter, etc.)
- Postal mail update from participant

Mass emails and/or mass mailings are not case specific and will not fulfill the monthly contact requirement

Services/Activities in Workforce One

Apprenticeship
Career Counseling
Classroom Training
CLIMB Consulting
CLIMB Training
Credential Attained without Training
Customized Training
Employed, Pending Exit
Engaged in Disaster Relief Services
Entrepreneurial Training
ESL Training
Financial Literacy Education
GED Training
Holding
Incumbent Worker Credential Waiver
Incumbent Worker Training
Individual Plan Development

Job Club
Local Flag
Non-Credentialed Training
OJT - Public or Private
Partnering
Planned Extended Leave
Pre-Vocational Services
Staff Assisted Assessment
Staff Assisted Job Placement
Staff Assisted Job Search in Area
Staff Assisted Job Search out of Area
Staff Assisted Relocation
Staff Assisted Relocation
Temporary Call-Back
Work Experience
Work Readiness Services

Workforce One (WF1) ACTIVITIES

Activities capture the services you are providing your participant

And

The funding source supporting that service

WORKFORCE ONE (WF1) ACTIVITIES

WF1 Activities track

- What your participant has done, is doing, and (whenever possible) what they plan to do next
- The provider funding the service and who approved the participant to receive the service
- When your participant started receiving the service and when they no longer needed the service
- Where they received the service and employer/training details related to the service
- The funding source supporting the service

WORKFORCE ONE (WF1) ACTIVITIES

For grantees who receive State Dislocated Worker formula allocations

- Participants are eligible for multiple funding sources when enrolled in the Dislocated Worker program
- Most participants access more than one fiscal year allocation or funding stream during their enrollment period and sometimes they access multiple at the same time

This is allowable

As long as those grants are actually supporting those services financially

KEEP IN MIND

Activities cannot be financially supported by a grant that is not yet active or one that has expired

Funding streams have a specific start date and a specific expiration date

- The Activity start date must be a date between the selected funding stream's start and end date
- Activities cannot have an end date that is after the selected funding stream's end date
- At the end of the Re-entry period of performance, 100% of all cases must have their activities closed with the last date of the grant period

Activity Data Entry Timeliness at Grant End

All services provided to a participant must be entered into that participant's WF1 case record within 15 business days of the event

Required case management data entry includes but is not limited to

- Capturing IEP (plan) dates
- Services the participant is accessing which are tracked through activities
- Support services provided
- Case notes related to live contact, counselor attempts to contact, and other relevant information received from partnering programs or training institutions.

What services must be provided to participants?

Basic Career Services

(ALL participants)

Individualized Career Services

(ALL participants)

Follow-up Services

(Participants exited to employment)

Basic and Individualized Career Service Activities in Workforce One

| | |
|--|--|
| Career Counseling | CLIMB Consulting |
| CLIMB Training | Engaged in Disaster Relief Services |
| ESL Training | Financial Literacy Education |
| Individual Plan Development | Job Club |
| Pre-Vocational Services | Staff Assisted Assessment |
| Staff Assisted Job Placement | Staff Assisted Job Search in Area |
| Staff Assisted Job Search out of Area | Staff Assisted Relocation |
| Work Experience | Work Readiness Services |

What Training Activities need a Measurable Skills Gain Captured?

| | |
|---|---------------------------------|
| Apprenticeship | Classroom Training |
| Credential Attained without Training | Entrepreneurial Training |
| GED Training | OJT - Public or Private |

What Training Activities need a Credential Captured?

| | |
|---|---------------------------------|
| Apprenticeship | Classroom Training |
| Credential Attained without Training | Entrepreneurial Training |
| GED Training | |

What Activities are not used in ANY Performance?

| | |
|----------------------------|-------------------------------|
| Holding | Planned Extended Leave |
| Local Flag | Partnering |
| Temporary Call-Back | |

(See your “DISLOCATED WORKER PROGRAM ACTIVITY DEFINITIONS AND PERFORMANCE STATUS” handout for more information on all activities)

OPENING CAREER SERVICE ACTIVITIES

Activity Type Individual Plan Development

▼ Hide Open Activity

*Start Date

Estimated End Date

*Funding Stream ▼

Activity Subtype

Estimated Cost \$

Estimated Hours

User Defined Text 1

User Defined Text 2

User Defined Date

▼ Show Comments

▼ Hide Case Note

Counselor assisted client in writing client's IEP. Client is interested in training and will begin researching training options. Client is looking for work using his current work experience in manufacturing. Client is TAA eligible. IEP will be updated as new goals are set. IEP is online

- Start dates should be the date the participant will begin the specific activity
- Estimated end dates should always be entered using your best judgement
- Make sure to select the correct funding source for each activity
- Enter a case note
- Click "Save"

ACTIVITY TAB VIEW

▼ Hide Dislocated Worker Seq 1 - Enrolled

Enrollment Date: 06/10/2016 Exit Date:

| Activity: Subtype | Funding Stream | Start Date/ End Date | Staff: Agency | Action |
|---------------------|----------------|-------------------------|------------------------------|------------------|
| Indv Plan Dvpmt | State Formula | 06/10/2016 Open | Amy Carlson Anoka Cty JTC | Edit Delete Copy |
| Career Counseling | State Formula | 06/10/2016 Open | Amy Carlson Anoka Cty JTC | Edit Delete Copy |
| Staff Assist JS In | State Formula | 06/10/2016 Open | Amy Carlson Anoka Cty JTC | Edit Delete Copy |
| Staff Assist Assess | State Formula | 06/10/2016 Open | Amy Carlson Anoka Cty JTC | Edit Delete Copy |

Add DW Activity



- Individual Plan Development, Career Counseling, and Job Search activities should all be opened as soon as the person is enrolled
- These type of activities will usually remain open throughout the case management period

File Maintenance for a Training Participant

What are some documents you must have in the case file before approving any participant training plans?

1. Fully detailed barrier to employment within the participant's IEP showing the participant's lack of education is an employment barrier and directly related to the employment goal
2. Signed Consent for Release form allowing the case manager and their agency to communicate with the training institution (invoices, class schedules, grades, and proof of completion transcript)
2. Labor Market Information for the participant's specific employment goal showing the occupation is in demand and the training is needed for that occupation
3. Proof the training is vetted by being Licensed or Exempt with Minnesota's Office of Higher Education **or** a print screen of the training program listed on the Eligible Training Provider List (ETPL)

OPENING TRAINING ACTIVITIES

| | |
|--|---|
| Entered by | Amy Carlson |
| Assign to Staff | Carlson, Amy (Current Primary) |
| Activity Type | Classroom Training |
| <input type="button" value="Change Activity/Staff"/> | |
| ▼ Hide Open Activity | |
| * Start Date | <input type="text" value="06/13/2016"/>  |
| Estimated End Date | <input type="text" value="06/13/2017"/>  |
| * Funding Stream | <input type="text" value="State Formula"/> ▼ |
| Activity Subtype | <input type="text"/> |
| Estimated Cost | \$ <input type="text" value="4000.00"/> |
| Estimated Hours | <input type="text"/> |
| User Defined Text 1 | <input type="text"/> |
| User Defined Text 2 | <input type="text"/> |
| User Defined Date | <input type="text"/> |

- Start dates should be the date the participant will begin CLASSES
- Estimated end dates should be the date you approve the training to end
- Make sure to select the correct funding source for each activity
- Scroll down to continue data entry

OPENING TRAINING ACTIVITIES

▼ Hide **School Info**

***School** - Anoka-Ramsey Community College
Clear School code for new search.

***School Location** ▼

***Training Program (CIP)** - Medium/Heavy Vehicle and Truck Technology/Technician
Clear CIP code for new search.

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

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

***WIA/WIOA Certification Status** ▼ [WIA/WIOA Certified Training Program List](#)

***Proposed Credential Type**

| | |
|---|--|
| <input type="checkbox"/> GED | <input type="checkbox"/> High School Diploma |
| <input type="checkbox"/> Occupational Skills Certificate/Credential | <input type="checkbox"/> Technical/Occupational Skills License |
| <input checked="" type="checkbox"/> AA or AS degree | <input type="checkbox"/> BA or BS degree |
| <input type="checkbox"/> Masters Degree | <input type="checkbox"/> Doctorate Degree |
| <input type="checkbox"/> Other Recognized Credential | |

***Estimated Attainment Date**

***Pell Grant Recipient** ▼

- Select the school name
- Select the school location
- Select an accurate O*NET code
- Select the correct WIOA certification status
- Choose the credential type they will receive after training
- Scroll down to continue your data entry


OPENING TRAINING ACTIVITIES

▼ Hide Case Note

Counselor approved HVAC AAS training with a concentration of Geo Thermal technology at Anoka Tech. After providing client with the ETPL
Counselor and client updated IEP
Training approved to begin 6/13/2016 with an estimated end date of 6/13/2017.

Spell Check

▼ Hide Close Activity

End Date  Completion Results ▼

Actual Cost \$ Actual Hours

Save Save and Open New Activity Cancel

- Enter a brief summary case note
- Detail the approved training dates, program, and school
- Explain the fact you provided the participant with the ETPL
- Click “Save”

ACTIVITY TAB VIEW

▼ Hide Dislocated Worker Seq 1 - Enrolled

Enrollment Date: 06/10/2016 Exit Date:

| Activity: Subtype | Funding Stream | Start Date/ End Date | Staff: Agency | Action |
|---------------------|----------------|--------------------------|------------------------------|-------------------------|
| Classroom Trng | State Formula | 06/13/2016 Open | Amy Carlson Anoka Cty JTC | Edit Delete Copy |
| Indv Plan Dvpmt | State Formula | 06/10/2016 Open | Amy Carlson Anoka Cty JTC | Edit Delete Copy |
| Career Counseling | State Formula | 06/10/2016 Open | Amy Carlson Anoka Cty JTC | Edit Delete Copy |
| Staff Assist Assess | State Formula | 01/15/2016 Open | Amy Carlson Anoka Cty JTC | Edit Delete Copy |
| Staff Assist JS In | State Formula | 06/10/2016 06/13/2016 | Amy Carlson Anoka Cty JTC | Edit Delete Copy Reopen |

Add DW Activity

- To update, change, or close an activity click on “Edit” in the “Action” section of the activity you are changing.
- Since the participant will not be looking for work while in training, click “EDIT” on the Job Search line and enter the end date of that activity (within 30-days of training start date)
- The Job Search activity can be reopened at any time when the participant will again be looking for work

Closing Career Service Activities

Activity Type Staff Assisted Job Search in Area


▼ Show **Open Activity**

▼ Show **Comments**

▼ Hide **Case Note**

Client is starting full-time credential training and will not be looking for work while attending his training program. Counselor will reopen this activity during client's last semester of school.

▼ Hide **Close Activity**

End Date  **Completion Results** ▼

Actual Cost \$ **Actual Hours**

- Enter a quick case note explaining the reason you are closing the activity
- Enter the last day the participant will be doing the activity
- Enter the completion results
- Click on “Save”

Closing Training Activities

Activity Type Classroom Training

▼ Show **Open Activity**

▼ Show **School Info**

▼ Show **Comments**

▼ Hide **Case Note**

Client successfully completed AAS degree. Copy of credential is in case file. Counselor has captured credential in WF1

▼ Hide **Close Activity**

End Date **Completion Results** ▼

Actual Cost \$ **Actual Hours**

Since everything related to the training was entered when you opened the activity....

- Enter a quick case note explaining the reason you are closing the activity
- Enter the last day the participant attended classes
- Enter the completion status
- Enter the cost the program paid towards the training
- Click on “Save”

REMINDER: Nothing in this screen allows you to capture a credential

Measurable Skill Gains Data Entry Timeliness

MSGs must be entered into WF1 no later than

***15 business days after receiving proof of a gain or
within 365 days after the start of the fiscal year***

Whichever is earlier

Five MSG Options

1. ***Educational Functioning Level Date:*** New documented assessments showing an increase in abilities;
2. ***Secondary Report Card Date:*** Documented attainment of a secondary school diploma or its recognized equivalent;
3. ***Post-Secondary Transcript Date:*** showing sufficient number of credit hours in accordance with academic standards;

Five MSG Options

4. **Training Milestone:** *OJT or Apprenticeship progress report from the employer or training provider;*
5. **Skills Progression Date:** *Successful passage of an exam that is required for a particular occupation or progress in attaining technical or occupational skills*

Capturing MSGs

WORKFORCE ONE

Home Search ▶ My Tasks ▶ Recent Work Manage Case ▶ Manage Program ▶ Reports References ▶ Resources ▶ Help

General

- At-A-Glance
- Contact
- Tickler
- Connect Messages
- Demographics
- Mobile User
- Work Preferences
- MN Works Resume

Case Note

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

Cases

- Program/New App
- Eligibility/Enrollment
- Activity
- TAA
- Plan
- Credential
- Measurable Skills Gain**
- Reporting Collection

Measurable Skill Gain Summary

Jack Frost Record ID 100003071
Birth Date 05/05/1958 Age 64

No measurable skills found.

Add New Measurable Skill

1. Log into WF1
2. Go into the specific case record
3. Click “Measurable Skills Gain” within the side panel
4. Click “Add New Measurable Gain”

Capturing MSGs

WORKFORCE ONE

Home Search ▶ My Tasks ▶ Recent Work Manage Case ▶ Manage Program ▶ Reports R

General

- At-A-Glance
- Contact
- Tickler
- Connect Messages
- Demographics
- Mobile User
- Work Preferences
- MN Works Resume

Case Note

- Add Case Note

Measurable Skills Gain Add

Jack Frost
Birth Date 05/05/1958 Age 64

*Program Sequence Dislocated Worker Seq 1

*Measurable Skill Type
None Selected

*Attainment Date

Add Document Save Skill Cancel

None Selected
Educational Functioning Level
Secondary or Post-Secondary Transcript
Skills Progression
Training Milestone

1. Select the Measurable Skill Type based on the documentation received
2. Click “Add Document” to save paperwork to WF1’s electronic document storage

Capturing MSGs

Document Add

Jack Frost

Program Seq DW Seq 1 (Enrolled)

***EDS Document Type** None Selected

***Select a File** None Selected
Education and Training
Employment

Next Cancel

1. Select if the gain is Education and Training related or if it is Employment related
2. Select the file to upload
3. Click Next

Capturing MSGs

Document Add

Jack Frost

Program Seq DW Seq 1 (Enrolled)

***EDS Document Type** Education and Training

Selected File J.Frost Transcript.doc

***Agency** Anoka County Job Training Center

***Staff Associated** Carlson, Amy

***Document Name** Grades or Transcript

Use file name as User Defined Document Name

User Defined Document Name Spring Term 2023 transcript

Folder Training

***Privacy Level** All Staff in Any Agency that Services the Case

Send Tickler To None Selected

Can Share with Person Yes

Received Date 04/06/2023

Document Date 04/06/2023

Signed Date

All fields with an asterisks are required

1. Select the document type being stored
2. Select the privacy level
3. Enter additional information that will be useful for a program monitors or coverage staff when trying to access the document

Capturing MSGs

Measurable Skills Gain Add

Jack Frost

Record ID 100003071

Birth Date 05/05/1958

Age 64

*Program Sequence

Dislocated Worker Seq 1

*Measurable Skill Type

Secondary or Post-Secondary Transcript ▼

*Attainment Date

04/08/2023



| Document Name: User Defined Document Name | Uploaded Date | Format | Action |
|---|---------------|--------|----------------|
| Grades, Transcript Spring Term 2023 transcript | Not Saved | | Tags Delete |

Save Skill

Cancel

Click "Save Skill"

Capturing MSGs

✔ Measurable Skill saved.

Measurable Skill Gain Summary

Jack Frost

Record ID 10003071

Birth Date 05/05/1958 Age 64

| Measurable Skill Type | Program Sequence | Attainment Date | Program Year ▲ | Document Name: User Defined Document Name | Format | Action |
|--|------------------|-----------------|----------------|---|---|--------|
| Secondary or Post-Secondary Transcript | DW Seq 1 | 04/08/2023 | 2022 ↑ | Grades, Transcript Spring Term 2023 transcript |  | Edit |

Add New Measurable Skill

**MEASURABLE SKILL GAIN IS NOW CAPTURED AND
THE DATABASE HAS DETERMINED IT IS A GAIN FOR PY2022!!**

Credentials Attained Data Entry Timeliness

Credentials must be entered into WF1 no later than

10 business days after receiving a copy of the credential or within 365 days from the participant's exit date

Whichever is earlier

CREDENTIAL SUMMARY SCREEN

The ONLY spot to capture a credential in WF1

| Credential Type | Program Sequence | Associated Activity | Actual Attainment Date | Action |
|--------------------|------------------|-----------------------|------------------------|--------|
| Credential Pending | DW Seq 1 | Class Trng, Occ Skill | | Edit |

Add Credential

*Program Sequence: None Selected

*Credential Type: Select Program Sequence to display credential types.

Estimated Attainment Date: [Calendar Icon]

Actual Attainment Date: [Calendar Icon]

Associated Activity: Select Program Sequence to display activities.

Save Cancel

- Immediately after opening a credentialed training activity, a “Credential Pending” status is triggered for the case.
- Nothing needs to be completed on this screen until the counselor receives a copy of the completed credential.

(Must be received and captured in WF1 within 365 days after exit)

CAPTURING THE CREDENTIAL

| Credential Type | Program Sequence | Associated Activity | Actual Attainment Date | Action |
|--------------------|------------------|-----------------------|------------------------|--------|
| Credential Pending | DW Seq 1 | Class Trng, Occ Skill | | Edit |

Edit Credential

Program Sequence: DW Seq 1

*Credential Type: Credential Pending

Estimated Attainment Date: 05/13/2017

Actual Attainment Date:

Associated Activity: Classroom Training - Occ Skills 05/13/2016

Save Cancel

Click
on
"Edit"

- After a copy of the credential is received, click on "Credential" in the side panel
- Once in the "Credential Summary Screen" click on "Edit" and the following will automatically populate in the "Edit Credential" fields
 - * "Credential Type" is the Current credential status
 - * "Estimated Attainment Date" you entered in the activity
 - * "Associated Activity" the activity is related to

CAPTURING THE CREDENTIAL

General

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

Cases

- Program/New App
- Eligibility/Enrollment
- Activity

Credential

- TAA
- Plan

Credential Summary

John H Jones Record ID 100002910

| Credential Type | Program Sequence | Attainment Date | Action |
|--------------------|------------------|-----------------|--------|
| Credential Pending | DW Seq 1 | | Edit |

Edit Credential

Program Sequence

***Credential Type**

- None Selected
- GED
- High School Diploma
- Occupational Skills Certificate/Credential
- Technical/Occupational Skills License
- AA or AS degree
- BA or BS degree
- Masters Degree
- Doctorate Degree
- Other Recognized Credential
- Credential Pending**
- No Credential Attained

Estimated Attainment Date

Actual Attainment Date

Associated Activity

Classroom Training - Occ Skills(04/10/2014) ▼

Save Cancel

Click on
"Edit
Credential"

Click on the "Edit Credential" field and select the type of credential your participant completed from the drop-down list

CAPTURING THE CREDENTIAL

| Credential Type | Program Sequence | Associated Activity | Actual Attainment Date | Action |
|--------------------|------------------|-----------------------|------------------------|--------|
| Credential Pending | DW Seq 1 | Class Trng, Occ Skill | | Edit |

Edit Credential

Program Sequence: DW Seq 1

*Credential Type: Technical/Occupational Skills License

Estimated Attainment Date: 06/13/2017

Actual Attainment Date: 06/13/2017

Associated Activity: Classroom Training - Occ Skills (06/13/2016+)

Save Cancel

(1)
Enter
“Attainment
Date”

(2) Click on “Save”

- Enter the “Actual Attainment Date” by completing one of the two methods below
 - * Manually enter the 2-digit month/day and the 4-digit year
 - * Click on the calendar symbol then select the month, day, and year
- Click “Save”

THE CREDENTIAL IS CAPTURED!

General Credential Summary

At-A-Glance **John H Jones** Record ID 100002910

Contact Show 25 100 200 500
Displaying 1 to 1 of 1

| Credential Type ▾ | Program Sequence | Associated Activity | Actual Attainment Date | Action |
|---------------------------------------|------------------|-----------------------|------------------------|--------|
| Technical/Occupational Skills License | DW Seq 1 | Class Trng, Occ Skill | 06/13/2017 | Edit |

Tickler

MN Works Resume

Demographics

Cases

REMINDER

The counselor needs to complete this task any time during the participant's enrollment or within 4 full quarters after the participant's exit date for all AD/DW and TAA training activities!

Program Exit Data Entry Timeliness

All participants must be exited from the program after 90 days has lapsed since last date of service

All participant exits must be entered into WF1 no later than 100 days after the last date of service

The exit date in WF1 is retroactive back to the last date of service

Program Exit Procedure = Employment

Example 1: Exiting to Employment

1. Case note your conversation with the participant on available Follow-up services for the next 12 months
2. Open the “Employed, Pending Exit” activity using the date of this last conversation/e-mail/text/message as the activity’s start date
3. Close all open activities on the case record with the date used as the start date of your Employed, pending exit activity
4. Enter any pending credentials and MSG on the case
5. Click on “Exit” within the side panel and enter all exiting details
 - I. Save Exit as Pending
6. After 90 days has expired following the start date of the “Employed, Pending Exit” activity the case will be automatically exited from the program

Program Exit Procedure = Other reason

Example 1: Exiting to an exclusionary reason or negative reason

1. Open the “Pending Exit, Other” activity using the date of this last conversation/e-mail/text/message as the activity’s start date
2. Close all open activities on the case record with the date used as the start date of your Pending Exit, Other activity
3. Enter any pending credentials and MSG on the case
4. Click on “Exit” within the side panel and enter all exiting details
 - I. Save Exit as Pending
5. After 90 days has expired following the start date of the “Pending Exit, Other” activity the case will be automatically exited from the program

Program Exit Procedure = Non-compliance

Example 1: Exiting due to Non-compliance

1. Enter a case note explaining the many contact attempts that you have tried over the 90 days since the last contact
2. Enter any pending credentials and MSG on the case
3. Click on “Exit” within the side panel and enter all exiting details
 1. Save Exit and remove case from caseload

What are Positive and Negative exit reasons (Preliminary Performance)

Positive Exit Reasons ~ Wage Detail will be confirmed

Called back

Entered Armed Forces *(needs supplemental wage information added to the WF1 "Follow-Up" screen for 4 quarters following the exit. If not entered, this will be a negative exit)*

Entered Registered Apprenticeship Training

Entered Unsubsidized Employment

Remained Employed

Started Business/Self-employed *(needs supplemental wage information added to the WF1 "Follow-Up" screen for 4 quarters following the exit. If not entered, this will be a negative exit)*

Negative Exit Reasons ~ Wage Detail will be confirmed

Cannot Locate

Family Care Problems

Found Ineligible

Moved from Area

Refused to Continue

Retirement

Program/Type Transfer

What does Exited with Exclusion Mean?

If the participant is exited with any of these exit reasons that participant will not be counted in performance outcomes

| DOL Definition of Authorized Exclusion Based on TEGL 10-16 Attachment 2 | WF1 Exit Reason |
|--|---------------------------------|
| Exits while receiving services due to incarceration in correctional facility or becomes resident of institution providing 24 hour support such as hospital or treatment center | Institutionalized |
| Exits after being called up to active duty for at least 90 days as member of National Guard or other reserve military unit. | Reservist Called to Active Duty |
| Participant is deceased | Death |
| Exits due to medical treatment expected to last longer than 90 days which would preclude employment or continued participation. | Medical Treatment |

What must you tell every participant who exits to employment?

They are eligible for follow-up services for 12 months after their exit date.

How do you prove you had this discussion?
Case Note it

What are examples of Follow-up Services?

(Available to all participants exited to employment for 12 months after exiting)

Counseling regarding the workplace

Peer support groups

Referral to support services in the community

Provision of performance and program cost information for providers of training

Provision of information on opportunities for job advancement

Completing the Program Exit Screen

General

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

Cases

- Program/New App
- Eligibility/Enrollment
- Activity
- Credential
- TAA
- Plan
- WIA YY Goals
- MYP Performance
- Participation Hours

Exit

Exit Summary

John H Jones Record ID 100002910

Hide Dislocated Worker Seq 1 - Enrolled

| Activity(ies) to Be Closed | Funding Stream | Start Date | Staff: Agency | Staff Role |
|----------------------------|----------------|--------------------|------------------------------|---------------|
| Indv Plan Dvpmt | State Formula | 06/10/2016 Open | Amy Carlson Anoka Cty JTC | Primary Staff |
| Career Counseling | State Formula | 06/10/2016 Open | Amy Carlson Anoka Cty JTC | Primary Staff |
| Staff Assist JS In | State Formula | 06/10/2016 Open | Amy Carlson Anoka Cty JTC | Primary Staff |

| Funding Stream | Start Date | End Date | Reason |
|----------------|------------|----------|--------|
| State Formula | 05/13/2016 | | |

Exit Program Sequence

Show Adult Seq 1 - Exited

(2) Click on
“Exit
Program
Sequence”

(1)
Click
on
“Exit”

Click on “Exit” in the side panel after you perform one of the following

- Have opened the Employed, Pending Exit activity
- Have opened the Pending Exit, Other activity
- Have not receive receipt of services from your participant in 90 days after multiple attempts

EXITING THE PARTICIPANT

(2) Click on “Next”

*** Primary Exit Reason**

None Selected


- Called Back
- Cannot Locate
- Death
- Entered Armed Forces
- Entered Registered Apprentice Training
- Entered Unsubsidized Employment
- Family Care Problems
- Found Ineligible
- Health/Family Care
- Institutionalized
- Moved from Area
- Program/Type Transfer
- PWIR Placement
- Refused to Continue
- Remained Employed
- Reservist Called to Active Duty
- Retirement
- Started Business/Self-Employed

(1) Click on the exit reason

- Select the “Primary Exit Reason” from the dropdown list based on the participants perspective
- If exiting due to non-compliance select Refused to Continue
- Click “Next”

EXITING THE PARTICIPANT

***Primary Exit Reason** Entered Unsubsidized Employment

***Exit Date** 06/13/2017 

***Labor Force Status** Employed Full-Time

***Did the participant receive support services?** No

***Did the participant receive needs related payments?** No

Hide Activities

| Activity: Subtype | Start Date | *Completion Result |
|---------------------|------------|---|
| Staff Assist Assess | 01/15/2016 | Successful <input type="button" value="v"/> |
| Indv Plan Dvpmt | 06/10/2016 | Successful <input type="button" value="v"/> |
| Career Counseling | 06/10/2016 | Successful <input type="button" value="v"/> |

- Enter the “Exit Date”, which is the last date of service
- Enter the “Labor Force Status” for the participant you are exiting
- Both questions related to support services and needs-related payments will automatically populate depending on the recorded information during enrollment
- Enter the completion results for all activities still showing active in this screen

EXITING THE PARTICIPANT

Delete Placement

*Empr Name Jack's Heating Systems

Worksite Coon Rapids

Empr Contact

Empr E-mail

Address1 8840 Evergreen Blvd

Address2

City Coon Rapids *State Minnesota Zip 55433

County Anoka Country United States

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

(763) 364-5555 Work

*Employer Industry (NAICS) 333415 -
Clear NAICS code for new search.
Search/Validate NAICS

*Occupational Title (O*NET) 53-3032.00 -
Clear O*NET code for new search.
Search/Validate O*NET

Job Title Truck Driver

*Job Sector Private

Job Duration Permanent (150 days or more)

*Job Start Date 06/17/2016

*Hourly Wage \$ 15.55 Undisclosed

*Hours per Week 40

*Job is Training Related Yes

*Benefit Package Yes

Benefit Detail

Dental Health
 Life Other
 Retirement Vacation

- Complete all known employer information
- Click on “Search/Validate NAICS” to complete required “Employer Industry” field
- Click on “Search/Validate O*NET” to complete required “Occupational Title” field

EXITING THE PARTICIPANT

▼ Hide Case Note

Participant exited as fully employed after successfully completing his training program. Counselor received a copy of the completed credential and has captured it in the "Credential" screen of WF1. A copy of the credential is in participant's case file. Counselor informed participant of the program follow-up benefits. Participant has agreed to future communication check-ins.

Spell Check

Remove from caseload

Save Final Exit Save Exit as Pending Cancel

Enter the final case note and Depending on the reason for exit do one of the following

- Non-compliance Exit = Click on the box next to “Remove from caseload” and click “Save Final Exit”
- Any other exit reason = Click on the box next to “Remove from caseload” and then click “Save Exit as Pending”

THE PARTICIPANT IS EXITED!

▼ Hide Dislocated Worker Seq 1 - Exited

| | | | |
|----------------|------------|-------------|---------------------------------|
| Exit Date | 06/14/2016 | Exit Reason | Entered Unsubsidized Employment |
| Funding Stream | | Start Date | End Date |
| State Formula | | 01/15/2016 | 06/14/2016 |

REMINDER

If there is still a “Pending Credential” status open at the end of 365 days following program exit, a tickler will be sent to the local level case manager instructing them to capture the credential information before the end 365 days

If the case manager does not capture the credential information within the timeframe allowed
IT WILL HAVE A NEGATIVE IMPACT ON YOUR CREDENTIAL MEASURE!

REQUIRED POST EXIT DATA ENTRY

If you use the Exit Reason: “Started Business/Self-Employed” OR the participant is working for an employer not required to report wages to MN’s Unemployment Insurance Division (Example: Railroad, Federal jobs, Non-profits, etc.)

YOU MUST

Enter Supplemental Wage information into the participant’s Follow-up tab of their WF1 record during the 2nd Quarter After Exit and the 4th Quarter After Exit

If this data is not entered, the case will be a negative in your 2nd and 4th Quarter Employment Measures

Acceptable File Documentation for Entered Supplemental Wage Data

Copy of the participants paystub relevant to the reporting period

- Dates of employment
- Name of employer
- Employer contact information

IRS Form 1040-ES, other IRS form, or at least one of the following for each quarter after exit

- A thorough list of individuals with whom the participant does business
- A list of companies the participant purchases supplies or services from
- Advertising materials the participant uses to market their business

(<https://apps.deed.state.mn.us/ddp/PolicyDetail.aspx?pol=286>: Handbook for Data Validators)

WF1 Tickler Creation for Supplemental Wage Data

Add Tickler

*Recipient: Carlson, Amy

*Due Date: 04/15/2016

Tickler for: baker, Field

Program: Dislocated Worker

*Task: Request Supplemental Wage documentation from Field. Once received, enter the follow-up tab details in the first quarter.

Buttons: Spell Check, Save, Save/Copy to New Recipient, Save/Copy to New Person, Cancel

- Click “Tickler” on the side panel of the participant’s record
- Enter the date you want to be alerted and the information the tickler needs to remind you to do
- To limit your data entry duties, click on “Save/Copy to New Recipient”
- Change the “Due Date” to the next date you need to confirm supplemental data, edit your task, and repeat

Supplemental Wage Data Entry

General

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

Case Note

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

Cases

- Program/New App
- Eligibility/Enrollment
- Activity
- Credential
- TAA
- Plan
- Youth Goals
- MYP Performance
- Exit

Follow-Up

- Case Assignment

Follow-Up Summary

Field baker **Record ID 100002480**
Birth Date 01/01/1959

▼ Hide DW Seq 1 - Exited

Post-Exit Information for Performance

| Quarter | Reporting Status | Contact Date | Staff: Agency | Action |
|--|----------------------------|--------------|---------------|---------------------|
| 1st Quarter 04/01/2016 - 06/30/2016 | Available now | | | Add |
| 2nd Quarter 07/01/2016 - 09/30/2016 | Available after 07/01/2016 | | | |
| 3rd Quarter 10/01/2016 - 12/31/2016 | Available after 10/01/2016 | | | |
| 4th Quarter 01/01/2017 - 03/31/2017 | Available after 01/01/2017 | | | |

- Click on “Follow-Up” in the side panel of the participant’s record
- Click on “Add” in the “Action” column to the right on the 1st Quarter line

Supplemental Wage Data Entry

Exit Date 02/15/2016
Post-Exit Quarter First Quarter
First Quarter Date Range 04/01/2016 - 06/30/2016
***Contact Date** 04/26/2016
Secondary Exit Reason None Selected
Employed None Selected
***Obtained Supplemental Wage Verification** Yes
Supplemental Verification Type None Selected
1099
Employer Phone Verification
None
Other Written Documentation
Pay Stub
W-2

Hide Case Note

Spell Check

Save Save and Enter Credential Cancel

- Enter the date you received the supplemental wage documentation from the participant
- Select the “Supplemental Verification Type” in which the participant provided

Supplemental Wage Data Entry

| | |
|--|---|
| Exit Date | 02/15/2016 |
| Post-Exit Quarter | First Quarter |
| First Quarter Date Range | 04/01/2016 - 06/30/2016 |
| *Contact Date | <input type="text" value="04/26/2016"/> |
| Secondary Exit Reason | None Selected |
| Employed | None Selected |
| *Obtained Supplemental Wage Verification | Yes |
| Supplemental Verification Type | 1099 |

▼ Hide Case Note

Received a copy of client's 1099. Counselor has filed it in client's case file. Next Supplemental Verification due no later than 09/30/2016. Tickler created to alert counselor on 7/15/2016.

Spell Check

Save Save and Enter Credential Cancel

Case note

- The type of verification used
- Where the documentation can be found
- The due date for next Supplemental Wage verification

Click "Save"

Supplemental Wage Data Entry

Follow-Up Summary

Field baker

Record ID 100002480

Birth Date 01/01/1959

▼ Hide DW Seq 1 - Exited

Post-Exit Information for Performance

| Quarter | Reporting Status | Contact Date | Staff: Agency | Action |
|--|----------------------------|--------------|------------------------------|---|
| 1st Quarter 04/01/2016 - 06/30/2016 | | 04/26/2016 | Amy Carlson Anoka Cty JTC | Edit Delete |
| 2nd Quarter 07/01/2016 - 09/30/2016 | Available after 07/01/2016 | | | |
| 3rd Quarter 10/01/2016 - 12/31/2016 | Available after 10/01/2016 | | | |
| 4th Quarter 01/01/2017 - 03/31/2017 | Available after 01/01/2017 | | | |

Your first “Post Exit Information for Performance” is finished!

Only three more to go!

Important Information

If a participant exits to Employment and their employer is required to submit wage detail

**DO NOT ENTER SUPPLEMENTAL WAGE INFORMATION INTO
THE PARTICIPANTS FOLLOW-UP DETAIL**

- ❖ If supplemental wage information IS found it will be added to the wages found in wage detail
- ❖ This will artificially inflate wage information reported to DOL

Running WF1 Reports by Fund

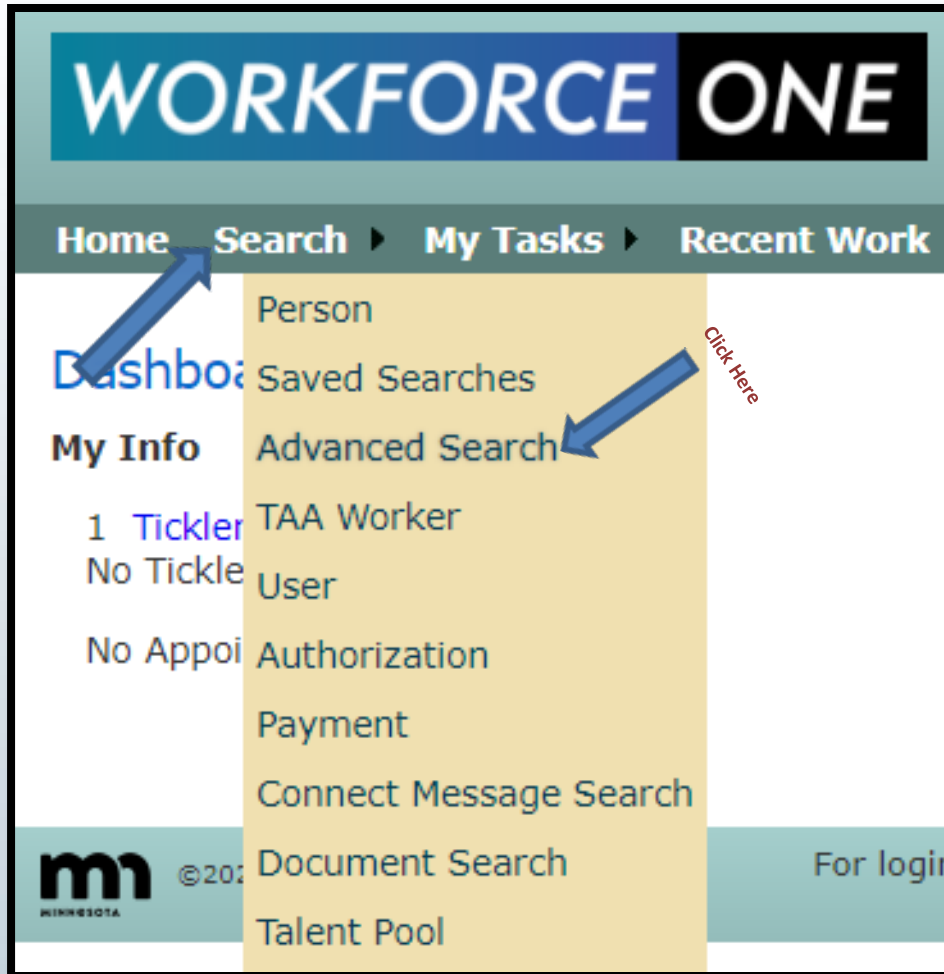
Program Level – Select this when you want the report to give you details on ALL participants who access the program regardless of funding source. In other words, this gives you “Total Dislocated Worker”

Funding Stream Category level – Select this when you want the report to give you details on participants who accessed federal funds only OR state funds only regardless of grant type

Funding Stream Level – Select this when you want the report to give you details on participants who accessed a specific funding stream. In other words, participants accessing a specific mass layoff project, DWG, or formula grant.

Custom Program – This will never give you information on WIOA Adult or Dislocated Worker participants. This is mainly used for Direct Appropriations.

Running WF1 Reports: Advanced Search



The Advanced Search has a dimension controller that allows you to drill deep into your data by specific elements, demographic, case manager, service, served dates, exit dates, etc.

Running WF1 Reports: Reports Tab

WORKFORCE ONE

Home Search ▶ My Tasks ▶ Recent Work Manage Case ▶ Manage Program ▶ **Reports** References ▶ Resources ▶ Help

Activity Detail Report

1. Click here

2. Select here

▼ Hide **Initial Criteria**

*Scope
Program level
Funding Stream Category level
*Funding
Funding Stream level
Custom Program level

Which Scope and Funding selection should I make?

Include past programs, projects, staff, agencies, and locations in criteria dropdown selections.

Next

Back to Report Search

▼ Show **Activity Detail Report**

mi ©2018 MN DEED For login issues, call 651-355-0500. For all other WF1 issues, submit a service desk ticket: <https://apps.deed.state.mn.us>

How to Complete an Activity Plan Using WF1 Reports

Form 4. Activity Plan

Please complete this quarterly table by filling in your plan in cumulative fashion (for example, the 3rd quarter should equal the 1st quarter plus the 2nd quarter). For quarters already completed, please use actual enrollment number as recorded in Workforce One. Step-by-Step instructions on how to pull quarterly data is included in Appendix A, or available by contacting Amy Carlson (amy.carlson@state.mn.us). Add or subtract additional quarters if necessary to reflect your grant terms.

Career Services are billed to cost category **857** on RPRs/FSRs. For a definition of Career Services and related activities, please see “General Definitions” beginning on Page 13.

Direct Training Services are billed to cost category **838** on RPRs/FSRs. For a definition of Direct Training Services and related activities, please see “General Definitions” beginning on Page 13.

| | Grant Start Date through 1 st Quarter | Grant Start Date through 2 nd Quarter | Grant Start Date through 3 rd Quarter | Grant Start Date through 4 th Quarter | Grant Start Date through 5 th Quarter | Grant Start Date through 6 th Quarter | Grant Start Date through 7 th Quarter | Grant Start Date through 8 th Quarter |
|------------------------------------|--|--|--|--|--|--|--|--|
| (857) Individual Plan Development | | | | | | | | |
| (857) Staff Assisted Assessments | | | | | | | | |
| (857) Staff Assisted Job Search | | | | | | | | |
| (857) Career Counseling | | | | | | | | |
| (857) Work Experience | | | | | | | | |
| (857) Pre-Vocational Services | | | | | | | | |
| (857) Work Readiness Services | | | | | | | | |
| (838) Non-Credentialed Training | | | | | | | | |
| (838) Classroom Training | | | | | | | | |
| (838) Customized Training | | | | | | | | |
| (838) CLIMB Training or Consulting | | | | | | | | |
| (838) Incumbent Worker Training | | | | | | | | |
| (838) OJT Public or Private | | | | | | | | |
| (838) Apprenticeships | | | | | | | | |

This Activity Plan is required in the following grant documents:

“Planning Document”

“Modification Request Form”

“Mass Layoff Project Planning Document”

Reports on Specific Funding Streams

Home Search ▶ My Tasks ▶ Recent Work Manage Case ▶ Manage Program ▶ Reports Referenc

Report Search

▼ Show Search Criteria

▼ Hide Search Results

New Search Refine Search

| Report ▼ | Program(s) | Report Type(s) | Report Description |
|----------------------------|---|------------------------|---|
| Activity Detail | Adult, ACP, CP, DW, DWP, HH, MFIP, MSFW, MN DH, MYP, SNAP ET, TY, Vet, VRS, WIA OY, WIA YY, WIOA ISY, WIOA OSY, WDU, YatW | Activities | This report includes report dates are in the user elects to report with open activities |
| Activity Employment Detail | Adult, ACP, CP, DW, DWP, HH, MFIP, MSFW, MYP, SNAP ET, TY, Vet, WIA OY, WIA YY, WIOA ISY, WIOA OSY, YatW | Activities, Employment | This report includes displayed. |
| Activity Summary | Adult, ACP, CP, DW, DWP, HH, MFIP, MSFW, MN DH, MYP, SNAP ET, TY, Vet, VRS, WIA OY | Activities | This report displays Totals if they have The subtotals are a |

1. Log into WF1 then click on “Reports” within the top panel

2. Select the “Activity Summary” Report

Reports on Specific Funding Streams

The screenshot shows the 'Activity Summary Report' page in the WORKFORCE ONE system. The page has a navigation bar with links: Home, Search, My Tasks, Recent Work, Manage Case, Manage Program, Reports, References, Resources, and Help. Below the navigation bar is the title 'Activity Summary Report'. A section titled 'Hide Initial Criteria' contains a dropdown menu for 'Funding' with options: Program level, Funding Stream Category level, Funding Stream level (highlighted), and Custom Program level. A red arrow labeled 'Step 1' points to the 'Funding Stream level' option. Below the dropdown is a question: 'Which Scope and Funding selection should I make?'. A checkbox labeled 'Include past programs, projects, staff, agencies, and locations in criteria dropdown selections.' is present. A red arrow labeled 'Step 2' points to this checkbox. Below the checkbox is a 'Next' button. A red arrow labeled 'Step 3' points to the 'Next' button. At the bottom of the page, there is a 'Back to Report Search' button and a 'Show Activity Detail Report' button. The footer contains the Minnesota logo, copyright information for MN DEED, and a link for login issues: <https://apps.deed.state.mn.us>.

1. Select “Funding Stream level” as the initial criteria for Funding
2. Click in the box to include funding streams that are no longer active
3. Click “Next”

Reports on Specific Funding Streams (Q1)

Activity Summary Report

▼ Hide Initial Criteria

Scope COFFR level
Funding Funding Stream level

Do not include past programs, projects, staff, agencies, and locations in criteria dropdown selections.

Change Initial Criteria

*COFFR Hennepin/Carver ETC - LWDA 09
Select/Deselect

*Funding Stream Henn/Carver WDA-09 PY18 State DW Formula ✓
Select/Deselect

▼ Hide Additional Criteria

*Date Type Activity ▼

*Activity Start Date 07/01/2018 Activity End Date 09/30/2018

Residence County All Values ▼
Select/Deselect

Service Model All Values
Select/Deselect

Run Report Back to Report Search

1. Select the funding stream you want the report to capture

2. Select the Date Type of “Activity”

3. Enter the date range you want the data to show (quarter 1 = 07/01 through 09/30)

4. Click “Run Report”

Reports on Specific Funding Streams (Q1)

| WORKFORCE ONE | | Activity Summary | | | | |
|----------------------------|-----------------------|-------------------------|-------------------------------|----------------------------------|---------------------|--|
| Activity | Currently Open | Currently Closed | Successfully Completed | Category / Activity Total | Person Total | |
| Career Counseling | 1 | 0 | 0 | 1 | 1 | |
| Staff Assist Assess | 0 | 1 | 1 | 1 | 1 | |
| Staff Assist JS In | 1 | 0 | 0 | 1 | 1 | |
| Individual Career - Total | 2 | 1 | 1 | 3 | 1 | |
| | | | | | | |
| Classroom Trng | 8 | 4 | 4 | 12 | 12 | |
| Cred Attain w/o Trng | 0 | 1 | 1 | 1 | 1 | |
| Training, Cred - Total | 8 | 5 | 5 | 13 | 13 | |
| | | | | | | |
| Non-Cred Trng | 2 | 0 | 0 | 2 | 2 | |
| Training, Non-Cred - Total | 2 | 0 | 0 | 2 | 2 | |
| | | | | | | |
| Enrollments - Total | | | | | 16 | |

1. "Person Total" Column gives you unique counts of participants accessing that service using that funding stream

2. Enrollment Total gives you the unique count accessing that funding stream

Data for 07/01/2018 – 09/30/2018

Reports on Specific Funding Streams (Q1)

| | Grant Start Date through 1 st Quarter |
|------------------------------------|--|
| (857) Individual Plan Development | 0 |
| (857) Staff Assisted Assessments | 1 |
| (857) Staff Assisted Job Search | 1 |
| (857) Career Counseling | 1 |
| (857) Work Experience | 0 |
| (857) Pre-Vocational Services | 0 |
| (857) Work Readiness Services | 0 |
| (838) Non-Credentialed Training | 2 |
| (838) Classroom Training | 12 |
| (838) Customized Training | 0 |
| (838) CLIMB Training or Consulting | 0 |
| (838) Incumbent Worker Training | 0 |
| (838) OJT Public or Private | 0 |
| (838) Apprenticeships | 0 |

07/01/2023 – 09/30/2023
Has been entered accurately

Now move on to Quarter 2



Reports on Specific Funding Streams (Q2)

Activity Summary Report

▼ Show **Initial Criteria**



▼ Hide **Additional Criteria**

***Date Type** ▼

***Activity Start Date**  **Activity End Date** 

Residence County ▼
[Select/Deselect](#)

Service Model
[Select/Deselect](#)



Keep the start date as the first date of the grant period and change the end date to the last day of the quarter you want data on (Quarter 2 ends 12/31/2023)

Reports on Specific Funding Streams (Q2)

| Activity | Currently Open | Currently Closed | Successfully Completed | Category / Activity Total | Person Total |
|----------------------------|----------------|------------------|------------------------|---------------------------|--------------|
| Career Counseling | 93 | 33 | 30 | 126 | 126 |
| CLIMB Consult | 11 | 2 | 1 | 13 | 13 |
| CLIMB Trng | 4 | 0 | 0 | 4 | 4 |
| Indv Plan Dvpmt | 92 | 34 | 30 | 126 | 126 |
| Staff Assist Assess | 1 | 17 | 16 | 18 | 18 |
| Staff Assist JS In | 76 | 32 | 29 | 108 | 108 |
| Individual Career - Total | 277 | 118 | 106 | 395 | 128 |
| | | | | | |
| Holding | 0 | 3 | 2 | 3 | 3 |
| Local Flag | 5 | 3 | 3 | 8 | 7 |
| None - Total | 5 | 6 | 5 | 11 | 10 |
| | | | | | |
| Classroom Trng | 19 | 9 | 9 | 28 | 28 |
| Cred Attain w/o Trng | 0 | 1 | 1 | 1 | 1 |
| Training, Cred - Total | 19 | 10 | 10 | 29 | 29 |
| | | | | | |
| Non-Cred Trng | 3 | 2 | 0 | 5 | 4 |
| Training, Non-Cred - Total | 3 | 2 | 0 | 5 | 4 |
| | | | | | |
| Enrollments - Total | | | | | 128 |

1. "Person Total" Column gives you unique counts of participants accessing that service using that funding stream

2. Enrollment Total gives you the unique count accessing that funding stream

Data for 07/01/2023 – 12/31/2023

Reports on Specific Funding Streams (Q2)

(continued)

Activity Detail Report


▼ Show **Initial Criteria**

▼ Show **Additional Criteria**

Run Report Refine Criteria Back to Report Search

▼ Hide **Activity Detail Report**

Report will need to be printed on legal size paper for best printed copy.
If additional analysis of report is needed, preferred export option is CSV.
Export to PDF to print the formatted report.

1 of 3 100% Find | Next 

WORKFORCE ONE **Activity Detail**

Show/hide additional common criteria

| Agency | Person Name | Record ID | Prog/Seq | Act Type | Sub Type | Success? | Act Start | Days Open | Act End | Staff Assigned | Exit Re |
|--------|-------------|-----------|----------|----------|----------|----------|-----------|-----------|---------|----------------|---------|
|--------|-------------|-----------|----------|----------|----------|----------|-----------|-----------|---------|----------------|---------|

To export the report and save the data to your computer desktop

1. Click on the floppy disk icon

2. Select the format you want saved

Reports on Specific Funding Streams (Q2)

(continued)

The screenshot shows the Excel interface with the 'Remove Duplicates' dialog box open. The dialog box contains the following elements:

- Buttons: Select All, Unselect All, My data has headers (checked).
- Columns list:
 - Agency
 - Name
 - Record_ID
 - Prog_Seq
 - Activity_Type
- Buttons: OK, Cancel.

- ✓ Merge the two spreadsheets together by copying one and pasting it within the other
- ✓ Click on the triangle in the far left corner of the spreadsheet so the entire sheet is highlighted
- ✓ Select the "Data" tab within the top panel of the Excel document
- ✓ Click on "Remove Duplicates"
- ✓ Select delete duplicate values within the "Record_ID" column to delete

The unique value is the count you use

Reports on Specific Funding Streams Grant Closeout

No activities open means all cases have "Exited" that funding stream

| Activity | Currently Open | Currently Closed | Successful Complet |
|----------------------------|----------------|------------------|--------------------|
| Career Counseling | 0 | 1 | |
| Indv Plan Dvpmt | 0 | 1 | |
| Staff Assist Assess | 0 | 1 | |
| Staff Assist JS In | 0 | 1 | |
| Individual Career - Total | 0 | 4 | |
| Employ, Pend Exit | 0 | 3 | |
| None - Total | 0 | 3 | |
| Classroom Trng | 0 | 2 | |
| Training, Cred - Total | 0 | 2 | |
| Non-Cred Trng | 0 | 1 | |
| Training, Non-Cred - Total | 0 | 1 | |

When a funding stream is no longer available there must not be activities open in WF1 showing that grant as its funding source

The "Currently Open" column of the Activity Summary must show all "0"

If no activities are open, all cases have "Exited" that funding source

Impacts to Performance: Verified Employment

- Workforce One is not a Performance tracking system it is a Case Management Tracking System
- Workforce One is simply the starting point to performance indicators related to employment
- Every case exited out of Workforce One with a Positive or Negative exit reason will be verified through Wage Detail
 - ❖ *If wages are found the case is a positive exit*
 - ❖ *If wages are not found the case is a negative exit*

Impacts to Performance: Type of Employment

If a participant exits to Self-Employment or any employment not required to report employee earnings to the Unemployment Insurance Division

- Supplemental Wage Information must be captured in WF1 during the 2nd and 4th quarters after the participant exits
- Supplemental Wage Information is entered into the Follow-Up tab within the participant's WF1 record
- Allowable Supplemental Wage Information includes: Copies of quarterly tax payment forms from IRS, self-reported follow-up survey from participants, self-employment worksheets signed and attested to by the participant

If supplemental wage information IS found it will be a positive exit

If supplemental wage information is NOT found it will be a negative exit

Impacts to Performance: Why numerators and denominators might be different than expected

- * A pseudo Social Security Number was used on the case (please follow the correct procedure to create a pseudo ssn)*
- * Wages were not found in wage detail reports*
- * Supplemental wage information was not entered into WF1's Follow-Up tab*
- * DOL and DEED consider the original exit reason and/or the secondary exit reason exclusionary*

Impacts to Performance: Why numerators and denominators might be different than expected

Participants who access multiple providers

If a participant accessed DW services from a provider then after exiting they reenrolled with a new provider within 90 days

*Performance counts
go back to the original provider*

Impacts to Performance: Old Services Left Open

If the participant is simply waiting the 90 day timeframe because they are no longer in need of services the only activity open on the case should be
“Employed, Pending Exit”

REMEMBER:

OPEN ACTIVITIES SHOW THE PARTICIPANT IS CURRENTLY RECEIVING A SERVICE

Communication requirements with the participant are no longer required when the pending exit activities are on the case

Impacts to Performance: Training

If a participant was scheduled to begin training but before any training costs were applied the participant decided not to attend training

DO NOT SIMPLY CLOSE THE TRAINING ACTIVITY, DELETE IT!

- ❖ If there is a training activity on record, reports will look for a captured credential
- ❖ If there is not a credential captured, it will result in a negative in the Credential Attainment Rate

Impacts to Performance: PY vs. FY

NOTHING BUT A TITLE

Program Year (PY): Titled with the year it began

Fiscal Year (FY): Titled with the year it ends

THIS MEANS

July 1, 2023 – June 30, 2024

IS Performance Program Year 2023 AND Fiscal Year 2024

State Performance Standards Program Year 2022 and 2023

| Negotiated Performance Goals for the Dislocated Worker program | Statewide Program Year 2022 | Statewide Program Year 2023 |
|--|-----------------------------|-----------------------------|
| 2nd Quarter Employment | 80.0% | 80.0% |
| 4th Quarter Employment | 79.0% | 79.0% |
| 2nd Quarter Median Earnings | \$12,300 | \$12,300 |
| Credential Attainment | 78.0% | 78.0% |
| Measurable Skill Gains | 65.0% | 66.0% |

WIOA Performance Indicators

| Performance Measure | Numerator | Denominator is | Activity in WF1 that triggers performance |
|------------------------|---|--|---|
| 2nd Quarter Employment | Has at least \$1 in Wage Detail in the 2nd quarter after Exiting or has Supplemental Wage Information entered into the Follow-up tab of WF1 for the 2 nd quarter after exiting | All Exiters during reporting period except those exited with exclusion | Any WF1 Activities |
| 4th Quarter Employment | Has at least \$1 in Wage Detail in the 4th quarter after Exiting or has Supplemental Wage Information entered into the Follow-up tab of WF1 for the 4 th quarter after exiting | All Exiters during reporting period except those exited with exclusion | Any WF1 Activities |

WIOA Performance Indicators (Continued)

| Performance Measure | Calculation | Included | Activity in WF1 that triggers performance |
|---------------------|-------------|--|---|
| Median Earnings | See Below | Total quarter wages for each participant showing wages in the 2nd quarter after exiting except for those exited with exclusion | Any WF1 Activities |

Odd numbered list

| Workforce One ID | 2nd Quarter Wages |
|------------------|-------------------|
| 100001863 | \$20.00 |
| 100000250 | \$500.00 |
| 100001875 | \$600.00 |
| 100002341 | \$1,000.00 |
| 100002481 | \$1,500.00 |
| 100002486 | \$3,300.00 |
| 100002509 | \$4,000.00 |
| 100002521 | \$4,200.00 |
| 100002506 | \$6,000.00 |
| 100002485 | \$8,000.00 |
| 100002519 | \$8,700.00 |

Even numbered list

| Workforce One ID | 2nd Quarter Wages |
|------------------|-------------------|
| 100001863 | \$20.00 |
| 100000250 | \$500.00 |
| 100001875 | \$600.00 |
| 100002341 | \$1,000.00 |
| 100002481 | \$1,500.00 |
| 100002486 | \$3,300.00 |
| 100002509 | \$4,000.00 |
| 100002521 | \$4,200.00 |
| 100002506 | \$6,000.00 |
| 100002485 | \$8,000.00 |
| 100002519 | \$8,700.00 |
| 100002519 | \$8,700.00 |

$3300 + 4000 = 7300/2$
Median is \$3,650

WIOA Performance Indicators (Continued)

| Performance Measure | Numerator | Denominator | Activity in WF1 that triggers performance |
|--|--|--|--|
| <p>Credential Attainment (Post-Secondary)</p> | <p>Credential was captured in WF1, Attainment date was during enrollment or within 365 days of exit, AND the type of credential attained is recognized</p> | <p>Date of exit is within reporting period AND was enrolled in "Post-Secondary" except those exited with exclusion</p> | <p>Apprenticeship, Classroom Training, Credential Attained without Training, Entrepreneurial Training, and GED training if the GED student exits to employment</p> |

Baseline Indicator for Program Years 2016 - 2019

| Performance Measure | Numerator | Denominator | Activity in WF1 that triggers performance |
|------------------------|---|--|---|
| Measurable Skills Gain | Documented increase of functioning level, transcript, report card, milestone, or skills progression during reporting period | All participants enrolled in training leading to a recognized postsecondary credential or employment except those exited with exclusion. It encompasses all training, OJT, Apprenticeship, and Customized Training | Apprenticeship, Classroom Training, Credential Attained without Training, Customized Training, Entrepreneurial Training, GED Training, Incumbent Worker Training, Incumbent Worker Credential Waiver, and OJT - Public or Private |

PY20, PY21, PY22, & PY23 WIOA Cohorts

| | Reporting Year | → | Program Year 2020 (7/1/20 - 6/30/21 Annual Report) | | | | Program Year 2021 (7/1/21 - 6/30/22 Annual Report) | | | | Program Year 2022 (7/1/22 - 6/30/23 Annual Report) | | | | Program Year 2023 (7/1/23 - 6/30/24 Annual Report) | | | |
|--|-------------------|---|---|-----------------------|-----------------------|-----------------------|---|-----------------------|-----------------------|-----------------------|---|-----------------------|-----------------------|-----------------------|---|-----------------------|-----------------------|-----------------------|
| Dislocated Worker and WIOA Adult Performance Cohorts | Reporting Quarter | → | Q1 Jul-Sep 2020 | Q2 Oct-Dec 2020 | Q3 Jan-Mar 2021 | Q4 Apr-Jun 2021 | Q1 Jul-Sep 2021 | Q2 Oct-Dec 2021 | Q3 Jan-Mar 2022 | Q4 Apr-Jun 2022 | Q1 Jul-Sep 2022 | Q2 Oct-Dec 2022 | Q3 Jan-Mar 2023 | Q4 Apr-Jun 2023 | Q1 Jul-Sep 2023 | Q2 Oct-Dec 2023 | Q3 Jan-Mar 2024 | Q4 Apr-Jun 2024 |
| SERVED | → | | | | | | | | | | | | | | | | | |
| EXITED | → | | | | | | | | | | | | | | | | | |
| 2nd Quarter Employment | Exiting Quarter | → | | | | | | | | | | | | | | | | |
| 2nd Quarter Median Earnings | Exiting Quarter | → | | | | | | | | | | | | | | | | |
| 4th Quarter Employment | Exiting Quarter | → | | | | | | | | | | | | | | | | |
| Credential Rate | Exiting Quarter | → | | | | | | | | | | | | | | | | |
| Measurable Skill Gains | Current Quarter | → | | | | | | | | | | | | | | | | |

See next couple of slides for directions on how to use this chart

Using the Cohort Chart

Finding Program Year (PY) Timeframes

The top colored section lists four program years in separate colors and the date range included in each of those program years.

PY20: yellow, PY21: blue, PY22: green, and PY23: orange

***Example:** If you want to know what months are included in PY22, look at the top section in green. This section tells you PY22 runs July 2022 - June 2023.*

Finding Quarter (Qtr) Report Timeframes

The second colored sections separates each program year into that program year's quarter report date ranges.

Quarter 1: Jul-Sep, Q2: Oct-Dec, Q3: Jan-Mar, and Q4: Apr-Jun

***Example:** If you want to know what months are included in PY22 Quarter 1, look at the second colored section under the PY22 label (in green) then find the first Quarter listed (on the left). This tells you PY22 Q1 runs July 2022 - June 2022.*

Using the Cohort Chart (Continued)

5 Performance Indicators Measured in every Quarter and Annual report

The far-left section in the chart lists these five Indicators

1. 2nd Quarter Employment: based on the participants' exit date and employer reported state and national wages in the 2nd quarter after exiting
2. 2nd Quarter Median Earnings: based on the participants' exit date and the median wage reported by employers (state and national wages) in the 2nd quarter after exiting
3. 4th Quarter Employment: based on the participants' exit date and employers reporting state and national wages earned in the 4th quarter after exiting

Using the Cohort Chart (Continued)

5 Performance Indicators Measured

4. Credential Rate: based on all participants who attended training during enrollment and the date the participants exited (4th quarter after the exiting quarter)
5. Measurable Skill Gains (MSG): Only real time measure. Based on all participants who attended training that leads to a credential or employment at any time during their enrollment period and if they have a captured MSG during the reporting period

Using the Cohort Chart (Continued)

To find the date range for exiters included in each Annual Report for all exit based performance indicators

1. Follow the PY's color in which you want participant exit date ranges on down through the individual indicator section
2. Once you are in the indicator line you want the information on, look directly up to the quarter date section above it
3. The quarter date ranges listed above that program year's color are the exit date ranges that indicator uses

Examples: PY22's 2nd Qtr Employment performance outcome includes participants exited July 2021 - June 2022. PY22's 4th Qtr Employment performance outcome includes participants exited January 2021 - December 2021.

Using the Cohort Chart (Continued)

To find the date range for exiters included in each Quarter Report for all exit-based performance indicators

1. Follow the PY's color for the quarter in which you want date ranges on down to the individual indicator section
2. Once you are in the indicator line, look directly up from the PY colored quarter section you want to know to the dated quarter section above it
3. The quarter date range listed is the exit date range used for that indicator in that program year's quarter

Examples: *Quarter 1 of PY22's 2nd Qtr Employment performance outcome includes participants exited July 2021 - September 2021. Q1 of PY22's 4th Qtr Employment performance outcome includes participants exited January 2021 – March 2021.*

Using the Cohort Chart (Continued)

Reminder: The Measurable Skill Gains Performance Indicator is a Real-Time Measure

1. Denominator: Includes all participants who attended training at any time during the actual program year (had a training activity open at least 1 day)
2. Numerator: Measures all those participants who have a skill gain captured in WF1 during each program year they had a training activity open on the case
3. The timeframe used in this indicator is the same timeframe for each Program Year the indicator is measuring

Examples: *PY22's Measurable Skill Gains date range includes participants who attended training July 2022 - June 2023. PY22's Q1 Measurable Skill Gains date range includes participants who attended training July 2022 - Sept 2022.*

Additional Guidance Hand-outs

- **WF1 Access form guidance for DW Users**
- **DW Pseudo SSN Procedure**
- **General Consent-Release of Information for all Training Plans**
- **DW Activity Definitions**
- **DW_AD Exit Procedure and Exit Reasons Defined**
- **WF1 Reports for Grant paperwork_Participant Plan**
- **Running DW Reports for BIPOC_Disability_and Veterans for Data Counts_4-2023**

Current Status of WF1 Access for Existing Providers

- SE Workforce Development Inc. (WDI) - LWDA 08 (52 participants)
Funding stream “SE WDI Re-entry 2088200 Pilot Project PY22”
- Central MN Jobs and Training - LWDA 05 (38 participants)
Funding stream “CMJTS Re-entry 2058200 Pilot Project PY22”
- Rural MN CEP Inc. - LWDA 02 (38 participants)
Funding stream “RURAL CEP Re-entry 2028200 Pilot Project PY22”
- Anoka County - LWDA 12
Funding stream “Anoka Re-entry 2128200 Pilot Project PY22”
- Goodwill-Easter Seals - SDA 73 (60 participants)
Funding Stream “Goodwill Re-entry 2478200 Pilot Project PY22”

Current Status of WF1 Access for New Providers

- COFFR - Lakes and Prairies CAP - SDA 179 (10 participants)
Agency - Lakes & Prairies Community Action Partnership, Inc
Funding stream “CAPLP Re-entry 2CAPLP8200 Pilot Project PY22”
- COFFR – Accessibility, Inc. - SDA 86 (72 participants)
Agency – Accessibility Minneapolis
Funding stream “AccessAbility Re-entry 2ACCAB8200 Pilot Project 22”
- COFFR – EMERGE Community Development - SDA 90 (39 participants)
Agency – EMERGE North and South Minneapolis
Funding stream “EMERGE Re-entry 2948200 Pilot Project 22”
- COFFR – Twin Cities RISE - SDA 79 (70 participants)
Agency – Twin Cities RISE Minneapolis
Funding stream “TCR Re-entry 2608200 Pilot Project 22”

Current Status of WF1 Access for New Providers (Continued)

- COFFR - Minneapolis Community and Technical College - SDA 67
Agency – Mpls Community and Technical College, Hennepin (123 participants)
Funding stream “MCTC Re-entry 2MCTC8200 Pilot Project 22”
- COFFR – SOAR Career Solutions - SDA 78 (23 participants)
Agency – SOAR Career Solutions, Duluth
Funding stream “SOAR Re-entry 2SOAR8200 Pilot Project 22”
- COFFR – Global Fatherhood Foundation - SDA 202 (44 participants)
Agency – Global Fatherhood Foundation, Brooklyn Park
Funding stream “GLBFF Re-entry 2GLBFF8200 Pilot Project 22”
- COFFR – Red Lake Nation- Oshkiimaajitahdah (14 participants)
Agency – ?
Funding stream “Red Lake Nation Re-entry 2RLNO8200 Pilot Project 22”

Performance Questions?



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