

# Adult Career Pathways Workforce One User Guide

# Adult Career Pathways Workforce One (WF1) User Guide

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# How to Use This Guide

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### NOTE:

- Workforce One was designed for use with Internet Explorer and Edge. Other browsers such as Google Chrome and Safari will not display reports and results properly.

## Data Entry Requirement

In accordance with Minnesota Statute 116L.98, all adult programs accepting funding from the Workforce Development Fund, must use the state uniform outcome and reporting measurement tool, which is Workforce One (WF1).

Grantees are required to enter all data into Workforce One within 15 business days of the actual event date. This includes, but is not limited to, enrollments, activities, case notes and exits. Workforce One data entry is required regardless of any additional data system an organization/grantee uses such as Client Track, Salesforce, etc.

## Purpose of the Guide

This guide is a program-specific resource to help you carry out certain tasks in Workforce One (WF1) as required by MN Statute 116L.98. It provides step-by-step instructions, tips, examples, and other information about these tasks to help you work as accurately and thoroughly as possible. The guide is also intended as a supplement to job training, but it should not be used as a self-study replacement to training.

### Before Using This Guide:

- **Gain Access to WF1:** [Select to complete a WF1 Security Access Form.](#)
- **Attend ETP Programs Case Management Training:** Provided by the Workforce One Team, this training includes a basic overview of system features and how to navigate WF1, and available WF1 Help resources and manuals.
- **Reports and Advanced Search Training:** Provided by the WF1 Team, this training is recommended for agency staff who will be monitoring progress and reporting outcomes.

Once access to WF1 is gained, upcoming training registration information can be found in WF1 under [Resources—Staff Training](#), enter a date parameter, then Run Search. Training registration may also be completed by another within the organization with WF1 access.

### When Using This Guide:

- **Read What You Need:** Read the tip boxes or link in the procedures to more information only if needed. The guide is not intended to be read cover to cover.
- **Use the Program-Specific Information:** The guide is tailored to the ACP and Pathways to Prosperity (P2P) programs, including terms, procedures, and policy and rule information.

## Getting Help

This guide will help you work more accurately, thoroughly, and efficiently in WF1. If you use it, you may need to call for help less often. However, if you do need help, send an email to your ACP Grant Coordinator your request will be answered as quickly as possible.

WF1 has a **Resource** page which includes a set of **User How-To Guides** and a **Glossary**. The **User How-To Guides** will show you features of the system not specific to this program, such as running reports on your program participants, setting up ticklers to help you manage a caseload, and more. We highly recommend that you read these guides so you can make the most out of your case management system. The Glossary is a reference that explains what each field in WF1 means. Access the **Resources** page by selecting Resources in the top menu.

Each page in WF1 has its own help content. View the help content for whatever page you are currently viewing by selecting **Help** in the top menu. A pop-up screen will then appear, providing a summary of the page, tips for entering information into the page, Glossary definitions for each field on the page, and actions you can take on the page. Select **Close** or **Print** to close the **Help** screen.

## Additional Information

The following types of boxes may appear in some steps:

### Tip boxes



#### TIPS:

- Provide ideas to help you work accurately, thoroughly, and efficiently

### Rule boxes



#### RULES:

- Provide program rules related to your program as well as state or federal requirements.

### Expert Advice boxes

**EXPERT ADVICE:**

- Provide guidelines for making the best choices and selections related to your program as tasks are completed.

**Policy or Regulation boxes****POLICY:**

- Provide brief explanations of state policies and/or federal regulations. They also provide links to the actual policy or legislation.

**Example:** Illustrates special circumstances or situations. Example:

**EXAMPLE:**

- Be specific about the type of job and employment goal.
  - **Write:** Jane wants to become a Licensed Practical Nurse (LPN) and work in a pediatric clinic.
  - **Don't write:** Jane wants a job in the medical sector.

**External Links**

You will find external links with additional information in some steps to outside resources, such as to O\*NET or NAICS codes to help you complete the step.

**Appendix**

Many types of additional information are located in the appendix, such as, if/then tables. A link to this information is provided in the step-by-step procedures. After reading the information, another link brings you back to the step in the procedure where you left off.

**ACP Terms vs WF1 Terms**

The user guide contains terms used by Workforce One (WF1). Some terms in the user guide and in WF1 may not be the same as with those used by your agency. Below are terms Adult Career Pathways (ACP) may use and the equivalent used in WF1.

ACP Term	Term in WF1
Client/Participant/Customer	Person
Location	Agency
Service	Activity
Employment Counselor/ Navigator/ Career Counselor	User
Individual Employment Plan	Plan

# Enrolling a Person into the Program

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## Contents

- [When to Enroll a Person](#)
- [Creating a Person Record](#)
- [Completing a New Application](#)
- [Determining Eligibility](#)
- [Completing Enrollment and Entering Initial Activities](#)

**REMINDER:** These procedures serve as a guideline only. Each record will require data entry specific to the situation of the person. Also, your agency may have specific policies or rules that require you to do different actions or steps in addition to or instead of some of the steps below.

## When to Enroll a Person

The process to enroll a person is typically completed when an applicant meets with the Navigator/Career Counselor one-on-one to obtain services from your agency and eligibility for the program has been determined. The data entry and pages in WF1 used to enroll the person correspond to the person's specific eligibility and need for service.

### RULES:

Each agency has its own intake process, but these rules apply to all agencies administering ACP programs.

- **Intake Form and WF1 Fields Must Match:** Your agency's intake form must correspond to the fields within the WF1 enrollment pages. These fields include household and demographic information and other types of information required by the system to proceed with enrollment.
- **Identity and SSN:** You must obtain a photocopy of an official form of identification that includes the person's full name and date of birth and social security number. Review [Documentation Needed to Support Participant Eligibility](#) to determine acceptable forms. Place a copy of the documentation in the person's hard file/EDS.

## Reporting

As part of the enrollment process, a person is assigned a program. Every program including the Adult Career Pathways program is funded by a state grant. The state runs reports to show the total number of persons served/enrolled in each program. This report also shows your specific agency's overall performance. Providing correct and complete information is crucial for accuracy in reporting. Your agency can run reports to monitor progress and outcomes throughout the grant period.

## Creating a Person Record

Begin this procedure after providing the Tennessee Warning, determining eligibility, and obtaining all required documents. Keep a copy of the person's documents in the official file – whether that be a paper file or uploading the documents into Electronic Document Storage (EDS) in WF1.

This procedure begins at the Dashboard/Home Page. Start by searching for the person in the system to avoid creating a duplicate record.

1. On the main menu bar, select **Search** and select **Person** from the drop-down list. The Person Search page displays. [Select here for the Person Search procedure.](#)
  - If the person was previously enrolled in an ACP program or a different program that utilizes WF1, they will display in the Search Results list.
    - i. Select the person's name from the list. The Person At-A-Glance page displays.
    - ii. Select **Contact** in the left navigation bar. The Contact Information page displays.
    - iii. If the person does not have an alternate contact skip to step vi. in the *Alternate Contact List* area,
    - iv. If the person does have an alternate contact listed, select **Add Alternate Contact**. The Alternate Contact Information page displays.
    - v. Complete all fields on the page with the contact information of someone who does/does not live with the person.
    - vi. Select **Save** to return to the Contact Information page.
    - vii. Review the information and fix any errors on the page.
    - viii. Select **Save**. Skip to the [Completing a New Application](#) procedure below.

OR

- b. If the person you are working with does not have a WF1 Person Record, they will not display in the list. Continue the following steps to add a new person record in step 2 directly below.
2. Select **Add New Person** in the *Search Results* box. The Person Add page displays.
3. Complete all fields on the page. Required fields are indicated by an asterisk (\*).



**TIPS:** These tips are for the following fields on the Person Add page.

- To ensure accurate and complete reports, always enter as much information as you can even if the field is not required.
- **SSN:** Enter the social security number (SSN) now so that the system can auto-populate it later in the eligibility pages. SSN can be verified according to the [Documentation Needed to Support Participant Eligibility](#).
- In the statewide Uniform Report Card.  
[Select here for more information on the Uniform Report Card.](#)
- **Primary E-mail:** If the person has an email address, add it now so you can send follow-up messages efficiently, when needed.



**POLICY:**

- **Verification of SSN:** A person's refusal or inability to show an item that verifies their SSN cannot be used to deny service if the person is otherwise eligible to receive services. However, DEED funds cannot be expended to serve or train the person.

[Select here to read the ACP Acceptable Eligibility/Enrollment Documentation listed by program.](#)

4. Select **Save**. The person record is created. The Contact Information page displays.
5. Complete all fields on the Contact Information page. Required fields are indicated by an asterisk (\*).



**TIPS:** These tips are for **Residential Address** on the Contact Information page.

- If the geo coding search was unable to verify the address you entered, review the address to determine if you made an error and fix.
- If you do not have the correct address, save the information entered so far and return to the Contact Information page to enter it later.
- If the person is homeless, ask for the address of a family member or friend whose address they can use as a mailing address. If they do not have one and have no other address to provide, use your Agency's address. Later, as part of wrap-around services, help them set up general delivery or P.O. box address and update the address on the Contact Information page.

- a. In the *Alternate Contact List* area, select **Add Alternate Contact**. The Alternate Contact Information page displays.
  - b. Complete all fields on the page with the contact information of someone who does not live with the person.
  - c. Select **Save** to return to the Contact Information page.
6. Review the information and fix any errors on the page.
  7. Select **Save**. The Person At-A-Glance page displays.

You have completed the Creating a Person Record procedure. The person now has a unique WF1 Record ID number assigned to them. Continue with Completing a New Application directly below.

## Completing a New Application

This procedure begins on the Person At-A-Glance page.

1. In the left navigation bar, in Case area, select **Program/New App**. The Program Summary page displays.
2. Select **Add New Application**. The New Application page displays.  
Review any other applications/enrollments the person may be enrolled and verify [co-enrollment](#) policies prior to completing the application.
3. Complete all fields on the page. Required fields are indicated by an asterisk (\*).



**TIPS:** These tips are for the following fields on the New Application page.

- **Application Date:** Enter the date the person completed and signed the application/intake form. This date may be in the past.
- **Location:** Choose the site where the person will receive services.
- **Funding Stream Category:** Choose either ACP Competitive Grant (i.e., WESA, Southeast Asian, African Immigrant, Getting to Work or Adult Support Services), Pathways to Prosperity or ACP Direct Appropriation. A person may not be enrolled in more than one of the same funding stream categories. See [Co-Enrollment](#) section.
- **Support Staff:** Enter the name of the person who has authority to make changes to the record, for example, a data specialist or colleague with whom you share duties.

4. Review the information and fix any errors on the page.
5. You may write a case note in the Case Note area describing that you have entered the person into WF1 and are completing the eligibility and enrollment process today.



### EXPERT ADVICE:

- **Spell check:** To ensure your note is accurate and clear, always use the spell checker to ensure that your free-form entries do not confuse your manager or state monitor due to spelling errors.
- **Case Notes:** Write a case note every time you have contact with the person, modify or add to their record, or when they submit something to you, e.g., a copy of a training certificate or newly acquired credential. A preliminary case note is required during the initial period of enrollment.

[Select here to read How to Write a Case Note.](#)

6. Select **Continue to Eligibility**. The Adult Career Pathways Eligibility page displays.

OR

Select **Save and Exit Wizard** if you need to get information that you don't have to continue. Return to this step when you are ready to begin again and select Continue to Eligibility.

You have finished the Completing a New Application procedure. Continue with Determining Eligibility directly below.

## Determining Eligibility

This procedure begins on the Eligibility page or by selecting Eligibility/Enrollment from within the left navigation pane.

1. Complete all fields on the page. Required fields are indicated by an asterisk (\*).



**TIPS:** These tips are for the following fields on the Adult Career Pathways or Pathways to Prosperity (P2P) Eligibility pages.

- **Decision Date:** Enter the date you determined the person was eligible for the program including obtaining all required verifications or administered assessments.
- **P2P ONLY: Now Enrolled in Sec Ed:** Refers to high school only (Secondary Education). If the person is not enrolled in secondary education, or are enrolled in any other kind of training, or not in training at all, select No. If the person is enrolled in secondary education, select Yes. High School/Secondary Education students are ineligible for P2P programs.
- **ACP ONLY: Meets Eligibility Criteria:** Select Yes and enter the person's eligibility in the Justification for Meeting Eligibility Criteria field, i.e., less than 200% FPG, person of color.

2. Select **Determine Results**. The results display below the **Determine Results** button.

NOTE: If the word "Eligible" displays as the result, continue to step 3 below.

OR

If the word "Ineligible" or an error message displays, fix errors, and then select **Determine Result** again. If "Eligible" displays and no error message appears, continue to step 3 below. If "Ineligible" displays again, refer to the program eligibility criteria to ensure participant is eligible for services.

3. Select **Save and Continue to Enrollment**. The Adult Career Pathways Program Enrollment page displays.

OR

Select **Save and Exit Wizard** to save and complete the process later.

The Determining Eligibility procedure is completed. Continue with Completing Enrollment and Entering Initial Activities directly below.

## Completing Enrollment and Entering Initial Activities

This procedure begins on the Enrollment page or by selecting Eligibility/Enrollment from within the left navigation pane.

1. Verify the auto-populated information (i.e. must match the info on the intake/application form and/or documentation in the file) and complete the fields on the page. Required fields are indicated by an asterisk (\*).

**Important:** Data on disability and race must be self-disclosed, meaning that the person must offer this information on their own. This information must be provided on their intake form without you asking them or otherwise prompting the person to tell you. If they did not provide this information, you must enter the option that indicates that they chose not to disclose.



**TIPS:** These tips are for some of the fields within the Adult Career Pathways Program Enrollment page.

- **Enrollment Date:** Enter the date the person was enrolled in the program.
- **Race:** Your intake form may have more options than WF1. Choose the best match. Use the same method for choosing race across your caseload. Choose white if the person is Hispanic and if they do not state another race.
- **Veteran:** Select only if the person brings **verification of status (i.e. a DD214 form)**.
  - **Service-Connected Disability:** If the person became disabled while in military service, select the appropriate percent disabled.
  - **Vet Separated in Last two Years:** If the person left the military less than 2 years ago, select Yes. If they left more than two years ago, select No.
  - **Campaigns:** Check the box next to campaign the person enlisted into.
  - **Additional Veteran's Priority may be found [here](#).**
- **Family Status:** [Select here to see an explanation of family status options.](#)
- **Actual Family Size:** The actual number of persons related by blood, marriage, or adoption living in a single residence with the person. Count people not living in the same residence but who were claimed as dependents on the family's most recent tax return.
- **Financial Aid Status:** Choose if the person is in college and is receiving financial aid to support their studies.
- **At or Below 200% Federal Poverty Guidelines:** Determine poverty percentage using income written on the intake form or on the income statement given to you.
- **Lack of Significant Work History:** Indicates whether or not the person has a weak attachment to the workforce in the recent past. Select yes if the person has not worked for the same employer for longer than three consecutive months in the two years prior to application.
- **Hourly Wage at Current Job:** If unemployed at time of enrollment, enter 0.00
- **Consent to Share with Partners:** Select Yes if the person has signed the Notice of Privacy Practices and How We Use Your Personal Information "Tennessee Warning".

2. In the *Open Initial Activity* area, in the **Activity Type** drop-down list, select **Assessment**.

- In the **Funding Stream** drop-down list, select the desired funding stream.

**RULES:**

- Every new enrollment must have at least one activity open to complete/save the enrollment.
- To receive any service from ACP, the person must be enrolled in the Individual Plan Development, Assessment, and Career Counseling activities. It is recommended that you enroll the person in these activities at this point in the process.

NOTE: Ask your manager if you do not know which funding stream to select.

3. Select **Enroll and Add Another Activity**. The Activity Add/Edit page displays.

- Enroll the person in any additional activities now. See also [Opening and Closing Activities](#) for additional information.



**TIPS:** This tip is for adding an Individual Plan Development (IPD) as an activity.

- Adding IPD as an activity is different than creating the IEP itself. [See Adding an Individual Employment Plan \(IEP\)](#).

You have completed the Completing Enrollment and Entering Initial Activities procedure.

NOTE: If you have used this procedure to co-enroll, you have completed co-enrollment.

# Co-Enrollment

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## Contents

- [Rules](#)
- [Entering A Co-Enrollment](#)



### RULES:

- Participants enrolled in Pay-for-Performance Legislative Direct Appropriations may not be co-enrolled with any other Employment & Training program under DEED oversight, such as Pathways to Prosperity, WIOA, or Dislocated Worker. Participants may not exit successfully from one DEED grant and consecutively enroll into a Pay-for-Performance Direct Appropriation. The only exception to this policy is co-enrollments with the Minnesota Family Resiliency Partnership program.

### Terms and Definitions:

- **Co-Enrollment:** When a participant is enrolled in more than one program. Occurs when a participant receives support from multiple funding streams (grants).
- **Program Sequence:** Adult Career Pathways or Pathways to Prosperity
  - **Funding Stream Category:** ACP Direct Appropriation or ACP Competitive Grant
    - **Funding Stream:** ACP SFY\*\*/\*\* Grant Type Grantee Name

**REMINDER:** Specific ACP co-enrollment rules exist and can be found within the [Adult Career Pathways Operations Guide](#).

These procedures serve as a guideline only. Each record will require data entry specific to the situation of the participant. Also, your agency may have specific policies or rules that require you to do different actions or steps in addition to or instead of some of the steps below.

## Rules

**Co-enrollment may occur within the same provider.** When a provider must enroll a participant into multiple ACP programs you will need to open a second program sequence (ACP Seq 2).



### EXAMPLE:

One program sequence/grant (ACP Seq 1) provides the person with funding for support services while another program sequence/grant (ACP Seq 2) provides the same person with funding for tuition. Both services are provided by Agency A.

**TIPS:**

When multiple funding streams are opened under activities to indicate co-enrollments, performance outcomes will not be accurately captured.

**Co-enrollment may occur between providers.** When a participant needs several services that one provider does not offer, co-enrollment can occur across multiple providers.

**EXAMPLE:**

- Agency A has a program through a Southeast Asian Economic Relief grant.
- Agency B has a program through a Pathways to Prosperity grant.
- Since both programs enter data into WF1 co-enrollment may occur.

**Co-enrollment must be written into the person's Individual Employment Plan (IEP).** Agencies may share IEPs internally between programs when co-enrolling.

**Co-Enrollments must be thoroughly case noted;** See case note section

See also [ACP Program Operations Guide](#)

## Entering A Co-Enrollment

To co-enroll a person in a second ACP program, a new program sequence must be opened. To open a second program sequence, complete a new application, determine eligibility, and complete enrollment. See [Completing a New Application](#) (opening a second program sequence) to get started.

# Creating and Updating an IEP

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## Contents

- [Adding an Individual Employment Plan \(IEP\)](#)
- [Printing and Signing the IEP](#)
- [Updating and Editing the IEP](#)

**REMINDER:** This procedure serves as a guideline. Each person will require data entry specific to their situation. Also, your organization may have policies or rules that require you to do different actions or steps in addition to or instead of some of the steps below.

### Terms and Definitions:

- **Plan and IEP:** “Plan” and “IEP” are short for “Individual Employment Plan.”

## Adding an Individual Employment Plan (IEP)

The plan serves as a contract between the employment counselor and the person. It tracks their goals, barriers, achievements, and steps they plan to take. It should be a motivating tool to help them achieve their goals. The plan is meant to be a living document that changes with the person’s life circumstances.

- **Paper or Online?** Whether to use paper or online is determined at agency level. If you're interested in using a paper plan, contact program administrators for samples.

**IMPORTANT:** If you are using a paper plan, create the plan with the person before beginning this procedure.

- **Using a paper IEP during the interview.** If you are using an online plan, but do not want to use a computer during the interview or do not have one available, you may first print out your agency’s IEP template, write down the person’s information during the meeting, and later input the answers into the online plan. You will need to obtain the person’s signature on either the written or online plan.

NOTE: IEP templates and requirements vary by agency based on program structure.



### TIPS:

- [Select here to view a sample IEP.](#)



### RULES:

- An IEP is required at enrollment or at least before the date of the first training activity. **The IEP (paper or printed online version) must be in the file and/or uploaded to EDS within WF1.**
- Training, support services, and individualized services (one-on-one) cannot be incurred, obligated, or distributed until after the participant is enrolled AND the participant and Career Navigator have both signed and dated the IEP.
- For a complete list of IEP requirements refer to the IEP section of [Adult Career Pathways](#)



This procedure begins in the person record.

1. In the left navigation menu, in the *Cases* area, select **Plan**. The *Plan Summary* page displays.
2. Select **Add Plan**. The *Adult Career Pathways Employment Plan* page displays.
3. **FOR A PAPER PLAN**
  - a. In the **Plan Mode** drop-down list, select **Paper**.
  - b. If you need a paper plan, select **Paper**, and then select **Save and Continue**.
  - c. Add a case note if desired.
  - d. In the **Start Date** field, enter the date the IEP was signed by employment counselor and the person (if person and employment counselor sign on different dates, use the last date the document was signed).
  - e. In the **Review Date** field, enter the date indicated on the IEP the person will achieve the first goal or the date that is a year from the start date, whichever date comes first.
  - f. In the **Confirmation Date** field, enter the date the plan is approved (usually the same as the start date, but may be a few days later, e.g., if the person met with you to create a plan, but had to come back with more information, the confirmation date may be a later date than the start date).
  - g. The completed IEP may be uploaded to WF1 in the Electronic Document Storage ([EDS](#)) section.

You have completed the Creating an Individual Employment Plan procedure for paper plans.

#### FOR AN ONLINE PLAN

- a. Select **Online**, then select **Save and Continue**. The page displays more fields.
  - b. Continue with step 3 directly below.
4. In the **Full Legal Name** field, type the person's full legal name.
5. In the **Goals** field type the person's employment goal(s).



#### RULES:

- At least one employment goal must be written in the *Goals* box.



**EXAMPLE:** Be specific about the type of job and employment goal.

- **Write:** Jane wants to become a Licensed Practical Nurse (LPN) and work in a pediatric clinic.
- **Don't write:** Jane wants a job in the medical sector.

6. In the *Plan Sections* area, in the **Add Section** drop-down list, select **Assessment**.
        7. Select **Add Section**. The *Assessment Section Edit* page displays.

- a. Select **Add Action Step**. The *Action Steps* options display.
- b. Select as many checkboxes as apply to your person. This may include:
  - Career Assessment Inventory
  - Math and reading assessment (this is required for some participants. See [Program Operations Guide](#) for the policy) if the person does not have a 2-year degree prior to starting credential/non-credentialed training)
  - Other skills related information (including Non-Transferable Skills, Obsolete Skills, etc.)

 **TIPS:**

- **Add Custom Step**. Select if you wish to add a detail that is not listed.
- **Action Step**. Brackets around a word or phrase, e.g., {workshop/class} on {day(s), time, location}, must be filled out with details. Upon closing the box, fields will display in blue.

Select the blue text to fill in the details.

- c. Select **Ok**.
  - d. Fill in the blue text for **Action Steps** you selected.
  - e. Add **Comments for Printed Plan** as needed.
  - f. Select **Save Section**. The *Assessment Section Edit* page redisplay.
8. In *Plan Sections*, select **Barriers** from the drop-down list.
  9. Select **Add Section**. The *Barriers Section Edit* page displays.
    - Select **Add Action Step**. Select as many barriers as you and the person identify by selecting the checkbox next to each barrier.

 **TIPS:**

These tips are for fields on the Barrier Section Edit page.

- **Action Steps** that have brackets around a word or phrase, e.g., {workshop/class} on {day(s), time, location}, must be filled out with details. When you close the box, each field will show in blue.

Select the blue text to fill in the details.

- **Common barriers** are Disability Status and Housing.
- Select **Custom Step** to add more information than is listed.

- Select **Continue**.
- Next to the first barrier, select **Provide Specifics**. A text box displays.
- Write a concise yet detailed description of the barrier in the text box.



**EXAMPLE:** Be specific about the barrier.

- **Write:** Jane's highest level of education is a GED. She needs to attend post-secondary training to achieve her employment goal of a Licensed Practical Nurse (LPN).
- **Don't write:** Jane needs more school.
- **Write:** Jane's financial needs analysis shows a financial barrier and needs transportation support services to commute to training and job interviews.
- **Don't write:** Jane cannot afford to do anything.

- Repeat step 9 for each barrier you selected in step 8.
  - Select **OK**.
10. In the *Plan Sections* area, select **Employment** from the drop-down list, and then select **Add Section**. The *Employment Section Edit* page displays. Select **Add Action Step**.
    - Select as many as appropriate.
    - Complete **Start by** and **Expected Completion by** fields.
  11. In the *Plan Sections* area, select **Support Services** from the drop-down list, and then select **Add Section**. The *Support Services Edit* page displays.
    - a. Select **Add Action Step**. Select as many as appropriate.
      - Complete **Start by** and **Expected Completion by** fields.
  12. In *Plan Sections* area, select **Training** from the drop-down list, and then select **Add Section**. The *Employment Section Edit* page displays. Select **Add Action Step**. Select as many checkboxes as appropriate.
    - Complete **Start by** and **Expected Completion by** fields.
  13. In *Plan Sections* area, select **I understand and agree to** from the drop-down list, and then select **Add Section**.
    - Select **Add Action Step**.
    - Select as many checkboxes as appropriate.
  14. At the bottom of the page, complete the start date, review date, and confirmation date fields.
    - In the **Start Date** field, enter the date the IEP was signed by employment counselor and the person (if person and employment counselor sign on different dates, use the last date the document was signed).
    - In the **Review Date** field, enter the date indicated on the IEP the person will achieve the first goal or the date that is a year from the start date, whichever date comes first.
    - In the **Confirmation Date** field, enter the date the plan is approved (usually the same as the start date, but may be a few days later, e.g., if the person met with you to create a plan, but had to come back with more information, the confirmation date may be a later date than the start date).
  15. Select **Save and Activate**.


OR

Select **Save Pending Plan** to return to the plan later. If you select this option, you will need to Save and Activate the plan before enrolling the person in other activities.

You have completed the Adding an Individual Employment Plan procedure. Continue with Printing and Signing the IEP directly below.

## Printing and Signing the IEP

This procedure begins on the ACP Program Employment Plan page.

1. At the bottom of the page, select **View/Print**. The *Print Launch* page displays.
2. In the bar below the **Open PDF** and **Back to Plan Summary** buttons, select the blue floppy disk icon () , and from the drop-down list, select **PDF**.
3. Select **Open** to generate the printable plan and then print one copy.
4. Have the person and employment counselor sign the copy, make a copy of the plan, and give it to the person for their records, then place the signed plan with original signatures into the person's case file.



### **RULE:**

- A signed and dated IEP is required for every person enrolled in an Adult Career Pathways program. If your agency's paper IEP does not have a signature line, it is required to add one since every IEP must be signed and dated by both the employment counselor and person.
- Case note that a signed and dated plan is in the person's case file.

You have completed the Printing and Signing the IEP procedure.

## Updating and Editing the IEP

Use this procedure to document a change in a person's life circumstances, desired career path, or other notable change.

### RULES:

- The IEP (Paper and Online) must be updated when:
  - Goals or objectives are achieved or changed, e.g., a person achieved their Certified Nursing Assistant and wants to go back to school to become a licensed practical nurse.
  - Support service needs and/or barriers have changed because living conditions and/or personal life changes have occurred.

This procedure begins in the Person Record.

1. In the left navigation menu, in the Cases area, select **Plan**. The *Plan Summary* page displays.
2. In the *Action* column, select **Copy**. The *Adult Career Pathways Program Employment Plan* page displays with fields populated with information from the old plan.
3. Edit the information on the page.
  - a. If the person has changed their career goal, in the *Goals* section, update the O\*NET codes and sample job titles.
4. In the *Plan Sections* area, in the *Actions* column, select **Edit**.
5. Edit the section, if needed.
6. Select **Save Section**.
7. Repeat steps 4-6 for all plan sections.

NOTE: You will need to complete steps 4-6 for each plan section, even if you do not need to make any edits.
8. Towards the bottom of the page, complete the remaining date fields.
  - In the **Start Date** field, enter the date the IEP was signed by employment counselor and the person (if person and employment counselor sign on different dates, use the last date the document was signed).
  - In the **Review Date** field, enter the date indicated on the IEP the person will achieve the first goal or the date that is a year from the start date, whichever date comes first
  - In the **Confirmation Date** field, enter the date the plan is approved (usually the same as the start date, but may be a few days later, e.g., if the person met with you to create a plan, but had to come back with more information, the confirmation date may be a later date than the start date).
9. Select **Save and Activate** or **Save as Pending**.
  - a. **Save and Activate:** If there was already an active plan on the program sequence, the old plan is now deactivated, and the new plan is activated.

- b. **Save as Pending:** A plan must be signed for it to be activated. If a participant has not signed the printed plan, Select **Save as Pending** it remain as pending until a signature is acquired and the counselor activates the plan.

10. Print the plan and have the person sign it. [Printing and Signing the IEP](#)



**TIPS:** These tips are for printing and signing the IEP

- Each agency may have different policies for obtaining signatures. Be sure to check your agency's policy prior to obtaining alternative signature.
- WF1 Connect may assist with the signature procedure.

# Entering Support Services

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## Support Services

WF1 tracks grant money that pays for the support services that are documented in a person's IEP. Each agency should have its own policy for providing equitable and consistent support services to participants. Refer to the [ACP Cost Category Guidance](#) or talk to your program administrator for more information.

**REMINDER:** This procedure serves as a guideline. Each person will require data entry specific to their situation. Also, your organization may have specific policies or rules that require you to do different actions or steps in addition to or instead of some of the steps below. Provided support services must be outlined within your agency's approved contract and included in your agency's support service policy.

This procedure begins in the Person Record

1. In the *Service* area on the left side navigation pane of a Person Record, select **Support Service**. The Support Services Summary page displays.
2. In the *ACP Sequence* box, select **Add Support Service**. The Support Service Add/Edit page displays.



**TIPS:** These tips are for the Support Service Add/Edit page.

- **Staff Assigned:** In the drop-down list, select a staff member.
- **Support Service:** In the drop-down list, select the appropriate support service type. [Select here to see a list of Support Services.](#)
- **Service Date:** Enter the date the cost was incurred.
- **Actual Amount:** Enter the actual amount the organization spent on the specified support service. If the support service was obtained at a discounted price, enter the amount actually paid (not the value).
- **Funding Stream:** Select the funding stream which paid for the support service.

3. Select the **Add as Case Note** checkbox.
4. Select **Save**.

You have completed the Entering Support Services procedure.

# Opening and Closing Activities

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## Contents

- [How Activity Data is Used](#)
- [Required Services \(Activities\)](#)
- [Opening Required Activities](#)
- [Opening Training Activities](#)
- [Opening Case Management Activities](#)
- [Closing Activities](#)

**REMINDER:** These procedures serve as a guideline only. Each record will require data entry specific to the person's situation. Also, your agency may have specific guidance that require you to do different actions or steps in addition to or instead of some of the steps below.

### Terms and Definitions:

- **Activity:** WF1 uses the term "Activity" to mean "Service" or "Event" in which a person participates to accomplish program goals. Use Activity pages in WF1 to track data related to IEP, accomplishments, and current progress or status of efforts toward achieving plan goals.
- **Open & Close:** To "open" an activity in WF1 means entering data to allow the person to use a service. The activity remains "open" until the person has completed the activity or is no longer engaged in the activity. At that time, you "close" the activity.

## How Activity Data is Used

DEED monitoring staff, Program Coordinators, and staff responsible for reporting performance outcomes use data entered into the WF1 Activity pages to:

- Verify that program participants have received appropriate services.
- Verify and issue reimbursement payments.
- Run reports on grant outcomes. For example, reports may be used by DEED to provide data to the Minnesota state legislature.
- Ensure Grantees are in compliance with their grant contract.

### WF1 Activities Track:

- Services provided to individuals.
- Accomplishments and progress notes for current plans and goals.
- Funding sources of services, namely a funding stream or grant.
- The name of the staff person who approved each service.
- Dates of service.
- Location of service.
- Details about the person's employer and/or training.



## Required Services (Activities)

All persons enrolled in Adult Career Pathways programs must receive three services from your agency while enrolled and active in the program. These required services are usually opened/entered into WF1 at the time of enrollment.

- Assessment
- Career Counseling
- Individual Plan Development (correlates to the development of the employment plan)

[Select here to learn more about these three initial required activities.](#)



**POLICY:** [Select here to read the full IEP policy.](#)

- **Signed IEP:** For a person to receive training, support services, or other services, the agency must develop, complete, and have the Individual Employment Plan signed by both the navigator/counselor and participant. Create an IEP with the person AND complete the [Adding an Individual Employment Plan \(IEP\)](#) procedure AND open the Individual Plan Development activity using the procedure below. A person cannot exit until this procedure is completed.

## Opening Required Activities

Use this procedure if you did not open the required activities, i.e., Assessment, Career Counseling, and Individual Plan Development at the time of enrollment.

This procedure begins in the person's record.

Activities can only be opened for a person who has been enrolled, begin this process within a person record.

1. In the left navigation bar, under Cases, select **Activity**. The Activity Summary page displays.
2. Select **Add ACP Activity**. The Adult Career Pathways Activity page displays.
3. In the **Assign to Staff** drop-down list, select the name of the staff person who is responsible to monitor the person's progress.
4. In the **Activity Type** drop-down list, select the activity you need to open.
5. Select **Next**. More fields display on the Adult Career Pathways Activity page. Complete as many fields as you can.
  - In the **Start Date** field, insert the date the activity is to begin.
  - In the **Funding Stream** field, select the appropriate ACP funding stream from the drop-down list.



**TIPS:** These tips are for the **Funding Stream** field.

- The funding stream is the source of payment for the service provided to the participant. Accurately selecting the funding stream ensures accurate reporting to the state legislature.
- If a participant may be eligible for multiple funding streams. [Select here for more information on co-enrollment.](#)



**RULES:**

- **Start Date and End Dates:** Must be within grant/funding stream/source span.
- **Expirations:** If a grant/program in which a participant is enrolled expires, but the participant is still receiving services, close all activities associated with that grant using the grant's expiry date, and exit the participant with the Program/Type Transfer option. This is only applicable when both the ending and new grants are ACP grants. Open a new activity with the new funding stream and use the new grant's start date as the activity start date. [Select here for the Closing Activities Procedure.](#)

6. Select **Save** or **Save and Open New Activity** to add another activity.
7. Repeat steps 2-6 for all three required initial activities.

You have completed the Opening Required Activities procedure.

## Opening Training Activities

- **An IEP is Required:** A signed IEP is required before entering training activities. If a person does not have a plan yet, enter one now before starting this procedure. [See Adding an Individual Employment Plan.](#)
- An academic assessment is required to be entered prior to entering a non-credentialed and credentialed training activity. See [Entering an Academic Assessment.](#)
- **Same Service, Same Activity: Activities record what the person is doing during the enrollment. However,** be consistent across caseloads for similar services/activities.

Options for training activities: [Select here to learn more about these activities.](#)

- ABE/Remedial Training
- Adult Diploma Program
- Apprenticeship
- Basic Skills Instruction
- Bridge Training\*
- ESL/ELL Training
- ITP Training\*
- OJT – Public or Private
- Credentialed Coursework/Training
- Financial Literacy Education
- GED Training
- On Ramp Training\*
- Non-Credentialed Training
- Work Readiness Skills Training
- Self-Employment Training

**\* Activities specific to Pathways to Prosperity program**

The Opening Training Activities procedure begins in the person's record.

1. In the left navigation bar, in the Cases area, select **Activity**.
2. The Activity Summary page displays. Select **Add ACP Activity**.
3. In the drop-down list, select the name of the staff person assigned to the case.
4. In the *Activity Type* drop-down list, select the activity.  
NOTE: Training activities will not display unless the person has a plan in WF1.
5. Select **Next**. Additional fields display.
6. In **Start Date**, enter the date the person will begin classes.
7. In **Estimated End Date**, enter the date the training is scheduled to end.
8. In Funding Stream drop-down list, select correct funding stream for the activity.

**TIPS:**

- When entering an Education or Employment activity, further information about the educational institution or employer are required. It is best practice to have this information prior to opening these activities. Creating a 'cheat sheet' or chart for codes (CIP, O\*NET, etc.) may be helpful to maintain consistency. See below for further guidance.

9. In the *School Info* area, in the **Location** drop-down list, select the name of the school or training institution.
10. In **Training Program**, select **Search/Validate CIP** to find the name of the training program. Use key words to find the closest match.

**TIPS:**

- If you cannot find the training or an appropriate CIP for the training, then select "Unlisted" and put more details in the comments box.

11. In the **Training Title (O\*NET)** drop-down list, select the occupation that matches the person's training.
12. In the **Proposed Credential Type** drop-down list, select the type of degree or certification the person will receive after completing training.
13. In **Estimated Attainment Date**, enter the date the person is expecting to receive a diploma or other certificate of training completion.
14. In the *Case Note* box, write the training dates, the name or type of program, the name of the school or training facility. [Select here to learn more about writing case notes.](#)
15. Select **Save**.

You have completed the Opening Training Activities procedure.

## Opening Case Management Activities

The following are options for Case Management activities:

- Employed Full-Time
- Employed Part-Time
- \*Financial Literacy Education
- Customized Cultural Program
- Job Search
- Local Flag
- Orientation
- Retention
- \*GED Training
- \*Work Readiness Skills Training

\*These activities can also be considered Training Activities in some cases.

[Select here to learn about more about Case Management activities.](#)

This procedure begins in the Person's record.

1. In the left navigation bar, in the Cases area, select **Activity**.
2. The Activity Summary page displays. Select **Add ACP Activity**.
3. In the **Primary Support** drop-down list, select the name of the staff member who is the primary counselor for the person.
4. In the **Activity Type** drop-down list, select the activity.
5. Select **Next**. Additional fields display.
6. For **Start Date**, enter the date that the activity started, E.g., if they are employed full time, use the date the job began.
7. From the **Funding Stream** drop-down list, select the correct funding stream for this activity.
8. In the *Case Notes* area, write a case note describing the activities. [Select here for more information on writing case notes.](#)
9. Select **Save**.

You have completed the Opening Case Management Activities procedure.

## Closing Activities

This procedure begins in the Person Record.

1. In the left navigation bar in the Cases area, select **Activity**. The Activity Summary page displays.
2. Within the row of the Activity, you need to close, the last column, select **Edit**. The Adult Career Pathways Activity page displays.
3. Write in the *Comments* area if there is anything you wish to add.



### TIPS:

- **Comments vs Case Notes:** Generally, a comment is an explanation specific to the data you are entering for a single field. Case notes are a written record of a person's case. Any **Comments** entered here will NOT appear as a case note. Any **Case Notes** entered here will appear as a case note.

4. Select **Spell Check** and revise any spelling errors.
5. In the Case Notes box, write a case note. [Select here for information on writing case notes.](#)

**EXAMPLE:**

- Jane finished Certified Nursing Assistant (CNA) training and passed both the skills and written test on dd/mm/yyyy.

6. In the *Close Activity* area towards the bottom of the page, fill in all fields.



**TIPS:** These tips are for the Close Activity area on the Adult Career Pathways Activity page.

- **End Date:** Write the date the person finished training.
- **Completion Result:** Select whether the training was successful.
  - If the person earned a credential, certificate, or diploma, select Successful.
  - If the person did not, or dropped out of the program, select Unsuccessful.
- **Actual Cost:** Not a required field for ACP Programs.
- **Actual Hours:** Not a required field for ACP Programs.

7. Select **Save**.

**REMINDER:**

- All activities must be closed when exiting.
- At least one activity must remain open while the person is active in the program.

You have completed the Closing Activities procedure.

# Entering an Academic Assessment

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An Academic Assessment is required to be entered prior to entering a person into a training activity. An **English Reading Level** and **Math Skills Grade Level**, determined from an official assessment, e.g., TABE or other that gives a K-12 level assessment, must be administered and the results captured in the **Assessment** section of Workforce One. See the [Adult Career Pathways Operations Guide](#) for a list of acceptable assessments.

Activities that will require an academic assessment include:

- Bridge Training
- Credentialed Coursework/Training
- ITP Training
- On-Ramp Training
- Non-Credentialed Training



**TIPS:** These tips are for entering an academic assessment in the Reading/Math Test tab within the Assessment area.

Participants with an associate degree/2-year post-secondary degree or above are exempt from this requirement.

- If the participant has an associate degree/2-year post-secondary degree, enter 13.
- If the participant has a four-year college degree or higher, enter 88.
- If the participant has not tested and their math/reading level is obviously below the 5th grade level, enter 87.
- Use of 13, 87 or 88 in place of an assessment must be specifically addressed in a corresponding case note.
- Enter these in the **Raw Score**.

If a participant refuses to take an academic assessment prior to entering a non-credentialed or credentialed training activity, select the **Refused to Test** button within the Assessment – Reading/Math test section of Workforce One. A participant cannot be refused services; however, the DEED funded program cannot reimburse for costs related to non-credentialed or credentialed training.

1. In the left navigation bar in the *Assessment* area, select **Reading/Math Test**. The Reading and Math Test Summary page displays.
2. Select **Add New Test** or **Refused to Test**.

3. The top of the page displays the Program Seq and Enrollment Date. Enter the **Test Category** from the following options:
  - ABE (Adult Basic Education); When selecting this option, the **Test Tool** option must be selected.
  - ESL (English as a Second Language) ; When selecting this option, the **Test Tool** option must be selected.
  - Other; When selecting this option, the **If other, please specify** option will display and will require an entry. An approved academic assessment must be entered in the display box.
4. Enter the **Test Tool** from the following options:
  - CASAS (life skills)
  - CASAS Math goals
  - CASAS Reading Goals
  - GED single test
  - MAPT (Mass Prof Test)
  - Other; When selecting this option, the **If other, please specify** option will display and will require an entry. An approved academic assessment must be entered in the display box.
  - TABE 11-12
  - TABE 9-10/TABE Survey 9-10
  - WonderlicGAIN
5. Enter **Administered Date**; after entering a date a Functional Area box will appear.
6. Enter **Administered By**
7. The **Functional Area** box is tailored to the specific test tool chosen above. ACP programs required a **Mathematics** and **Reading Raw Score** to be entered. Enter the **Raw Score** according to the outcome of the academic assessment administered.
8. The **Grade Level**, as determined by the academic assessment administered may be entered.
9. A **Comments** and **Case Note** text box are available to add information regarding the assessment administered.
10. Select **Determine EFL**.
11. Workforce One will auto-population the **Educational Functioning Level (EFL)** according to the **Raw Scores** entered.
12. Select **Save**.
  - An **Alert** text box will appear with information about the basic skills deficiency/no longer basic skills deficient. Select **OK**.
13. Academic Assessments may be updated as the basic skills improve to do so select **Edit** and follow steps 5-12 above.

# Entering Performance Information

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## Contents

- [Entering a Credential](#)
- [Actual Hours](#)

## Entering a Credential



**TIPS:** Remember that certificates and “non-credentialed” training outcomes are entered in the credential tab.

- **End Date:** Write the date the person finished training.
- **Completion Result:** Select whether the training was successful.
  - If the person earned a credential, certificate, or diploma, select Successful.
  - If the person did not, or dropped out of the program, select Unsuccessful.
- **Actual Cost:** Write the total amount of money that was spent on this activity, if activity was paid for on a per person basis.

This procedure begins in the person's record.

1. In the Cases area of the left navigation bar, select **Credential**. The Credential Summary page displays.
  - All credentials that have been entered to date will display.
  - Open activities requiring a credential will display “Credential Pending.”
2. In the row that displays the name of the activity for which you are entering a credential, select **Edit**.
3. In the **Credential Type** drop-down list, select the type of credential the person has earned.
4. In the **Actual Attainment Date** field, select the date that the school issued the credential, not the date the person received a diploma or other certification.
5. In the **Associated Activity** field, check that the correct activity associated with the credential appears, select correct activity if needed.
6. Select **Add Document** to upload a copy of the certificate/credential/diploma to the [EDS](#) system.
7. Select **Save**. The Credential Summary page redispays with the new credential listed in the table.



### **RULE:**

- **Credential:** A paper or electronic copy of the credential must be in the person's file.

You have completed the Entering a Credential procedure.



# Exiting a Person

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## Contents

- [When to Exit a Person](#)
- [Exiting a Person from WF1](#)

**REMINDER:** These procedures serve as a guideline only. Each record will require data entry specific to the situation of the person. Also, your organization may have specific policies or rules that require you to do different actions or steps in addition to some of the steps below.

## When to Exit a Person

Below is a table of common situations in which a person should exit from the system, or another action is appropriate.

NOTE: This list does not cover all possible situations.

If the person...	Then
...has not made contact or returned your attempts to make contact for 90 days,	exit the person.
...has completed training, and does not want or need services from your organization to look for a job,	exit the person.
...has successfully finished training or an activity, but has asked for additional help searching for a job,	do not exit the person; instead, ensure that Job Search activity is open.
...is in an unstable situation, e.g., living arrangements, and indicates a desire for support services,	do not exit the person; instead, revisit the IEP and ensure open activities correlate to the person's situation.
...has a medical issue that will require more than 3 months without contact with you,	do not exit the person; instead, open the Holding activity.
...is still receiving services when a grant is completed,	exit the person; if a new funding stream is available, choose exit reason Program/Type Transfer and re-enroll in the new funding source.

**Note: All participants must exit for applicable reason, or if the participant will continue receiving services in the next program year can exit with Program Type/Transfer exit reason, within 30 days of grant close/end date.**

## Avoid Backlogs of Exits

When you determine that a person should exit from the system, complete this procedure right away. Do not delay. Waiting until later, when exits must be finished in a short period of time, may result in errors and stress to your workload.

WF1 will not let you exit unless the person has a plan (IEP) in the system.

WF1 will automatically close a case, using the exit reason "Soft Termination", that has no open activities for 45 days.

## Exiting a Person from WF1

Begin this procedure after you determine that a person must be exited from the system.

1. From the Dashboard, select the person from the *Current Caseload* list. The Person At-A-Glance page displays.  
[Select here for the Person Search procedure if needed.](#)
2. In the left navigation bar, in the Cases area, select **Exit**. The Exit Summary page displays.
3. Select the **Exit Program Sequence** button. The Adult Career Pathways Exit page displays.
4. In the **Primary Exit Reason** drop-down list, select the reason that most closely matches, and then select **Next**. The fields on the page now correspond to the exit reason you selected.



**TIPS:** The links below bring you to additional information in the appendix that will help you choose an exit reason.

- Select [Exit Reasons Explanation Chart](#) for an explanation of program-specific exit reasons.
- Select [Exit Reasons with Neutral Effects on Performance Outcomes](#) for a list of exit reasons that will not be counted in performance outcomes.

5. Complete all fields on the page. Required fields are indicated by an asterisk (\*). Use step 25a-c if needed only.
  - If activities have not been closed, in the *Activities* area of the page, select the correct completion result from the drop-down list for each activity.
  - Complete other fields in the *Activities* area.
  - If the person started a job, in the *Placement Information* area of the page, select the employer if the employer displays in the drop-down list.

OR

Select **Next** under the **Add New Employer** option and complete the fields in the *Employer 1* area of the page.



#### TIPS:

If you cannot find the exact title of a job in the drop-down list, choose the closest similar title. The links to external websites provided below will help you complete the *Employer 1* area:

- Select [NAICS Codes](#) to choose the correct code.
- Select [O\\*NET Codes](#) to choose the correct code.

**Remember:** Select back into both the WF1 window *and* the User Guide window after using the information in the external link.

6. In the *Case Note* area of the page, write why the person exited the program if you have not already written this note.



#### RULES:

- A case note must be entered that indicates why a person has exited the program.



#### EXPERT ADVICE:

- Always use the spell checker to ensure that your free-form entries do not confuse your manager or state monitor due to spelling errors.

7. Select the **Remove from Caseload** checkbox if you do not need the person to display in your Dashboard. The person will still display in your follow-up and retention list. When the Confirmation box displays, select **Yes** to confirm.

OR

Do not select the checkbox if you need the person to display in your Dashboard.

8. Select **Save Final Exit** if all of the fields on the page are entirely completed.

OR

Select **Exit as Pending** if a detail is missing and you need to return to the record later.

9. Select **Yes** to confirm the exit. The Exit Summary page displays

You have completed the Exiting a Person procedure.

# EDS – Electronic Document Storage

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## Add a Document to Workforce One

Users can upload a document after a program application has been entered by selecting the **Add Document** link from the left navigation menu.

Inside the **Document Add** window, select the applicable **Program Sequence** to associate with the document, the applicable **EDS Document Types** to relate to the document with similar characteristics, and then select to “**Browse...**” to a file to select for uploading.



### TIPS:

To access specific Adult Career Pathways or Pathways to Prosperity document names and types go to References> EDS Configuration and search the Program Name in WF1.

Select **Next** to view the additional required and optional fields to complete called “tags.”

- Tags allow users to find documents via search. Some tags will have default values assigned to them and some will require their values to be in a specific format such as a date, a number, or a currency value.
- Comments and case note may also be entered in the Document Add page.

Agency, Staff Associated, Document Name, and the Privacy Level fields must be entered prior to uploading the document into EDS.

- Choose **Staff Associated** with person's record.
- Choose the **Document Name** is the title of the document being uploaded the user can specify a user-defined document name to handle situations where a custom value is desired.
- The **User Defined Document Name** field is used to specify a user-defined document name where a custom value is desired.
- The **Folder** field provides additional groupings of documents for retrieval. Documents can be assigned to only one folder.
- Choose the **Privacy Level** field if the document should only be available to the currently assigned staff or users with the privacy privileges.
- **Can Share with Person** will indicate whether a document can or cannot be shared with a user.
- **Received Date** indicates when the document was received by the agency.
- **Document Date** is available if a user would like to store a date that appears on the document that isn't one of the other dates.
- **Signed Date** is the date the document was signed.
- **Expiration Date** is the expiration date of the document.

- **The Reasons for Collecting** field gives the user a dropdown, multi-select list of reasons the document was collected.
- The **School** field identifies the school, college, or university associated with the document.
- **User Defined Date 1 or 2** fields are dates that providers collect not captured elsewhere in WF1.
- **User Defined Tag 1 or 2** fields further identifies a document and are used by the direction of each agency.
- The **Comments** field communicates any additional information about the document.
- The **Case Note** and **Case Note Category** documents client-specific information related to the document that are not formally captured elsewhere in WF1. Notes entered in this textbox saves to the person's Case Note Summary.

Select the **Upload** button and a confirmation message will appear indicating that the document uploaded to EDS through a message stating, "Document saved."



#### TIPS:

If you receive an *error message* stating that the document is too large, re-scan the document using different scanner settings. Verify that the settings you are using to scan the document are not in color. Some scanners are set to automatically detect the presence of color and will create color documents which may be too large to upload. To ensure that the documents are smaller, use the black and white setting. Using the gray scale setting may also create a larger file.

## View Documents Added to Workforce One

All documents added to Workforce One can be viewed within the person record by navigating to a person record and selecting the **Document Summary** link in the left navigation menu.

The Document Summary allows users with the appropriate privileges to edit document tags, add comments to documents, delete documents from EDS, create a copy of a document, and move the document to another program sequence.

The Document Summary will display all documents related to each program sequence in panels. Each panel displays the program name, sequence number, case status and the columns for document name:

- user defined document name (with link to download document)
- EDS document type; uploaded date
- format (of the document)
- comments added (yes or no)
- actions (tags and comments, copy, move, and delete)

## Edit Tags and Comments on Documents

From the Document Summary page, select the **Tags and Comments** link to review the tags and comments associated with the document in EDS.

On the Document Tags and Comments page, select the "Edit Tags" button to update, add, or change the tags related to the document. You can also add additional Comments by selecting the "Add Comments" button. You can download and view the document from this page by selecting the "View Document" button. To return to the Document Summary page, select the "Cancel" button.

## Delete Documents from EDS

Users with the appropriate privileges can delete documents from EDS on the Document Summary page. Locate a document you want to delete on the **Document Summary** page and select the **Delete** link. A dialog box will appear that this action will permanently remove the document and the action cannot be undone. It will also be required to list the reason why the document is being deleted. Enter the reason in the textbox provided and select the **Yes** button. (If it is decided not to delete the file, select the **No** button to end the delete process.) Once you select **Yes**, a message will display *EDS document deleted* confirming the document has been deleted.

## Copy using Person Record in Document Summary

Users with the appropriate privileges may copy documents from one program sequence to another program sequence within the same person record. To copy a document, navigate to the **Document Summary** link in the left navigation menu while in the person's record. Locate the document you want to copy and select the **Copy** link in the **Action** column.

The Document Copy page will display with labels or the following required fields to be completed:

- EDS Document Type with which you want to associate the document
- Document Name related to the Document Type
- Folder related Document Type

If the document will be copied to a program sequence that is the same as the current document, once the program sequence in the dropdown is selected, the default EDS Document Type/Document Name/Folder will auto-populate to the same as the copied document. Select the **Copy** button to complete the document copy process. You will receive confirmation that the document copied through a message stating *Document copied*.

# Reports and Advanced Search

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## Contents

- [Reports and Their Uses](#)
- [Creating a List of Saved Reports](#)
- [Selecting the Correct Saved Report](#)
- [Creating Customized Reports Using Advanced Search](#)
- [Example Reports Using Advanced Search](#)
- [Saving Searches for Future Uses](#)
- [Navigating to Cases within Advanced Search Reports](#)

**REMINDER:** These procedures serve as a guideline only. Your organization may have specific policies or rules that require you to do different actions or steps in addition to or instead of some of the steps below.

## Reports and Their Uses

The ACP Program uses reports for a variety of purposes.

For example:

- Agency managers use preliminary performance reports to get of an idea what official (true) performance will look like.
- Case managers run reports for budget reasons.
- Bookkeepers and accountants use reports to justify their requests to DEED for payments.
- Case managers, managers, and other staff use reports to check that data entry was entered correctly.
- Recurring quarterly reports on program outcomes.

Some reports contain criteria for data already set by WF1. Customized reports can be created based on specific criteria that you can determine.

[Select here to learn about creating customized reports using Advanced Search.](#)

## Creating a List of Saved Reports

Use the following procedure to review descriptions of pre-set reports for ACP.

1. On the main menu, select **Reports** from top navigation. The Report Search page displays with a table of all reports available in WF1.
2. In the *Search Criteria* area, in **Program(s)** drop-down list, select **Adult Career Pathways**.



### TIPS:

- **Select/Deselect:** This feature allows you to select more than one option for the criteria in some fields. The words "Select/Deselect" displays in blue font.

3. In the **Report Type(s)** drop-down list, select **All Values** to see a list of all reports.  
NOTE: Select a specific report if you decide you need a single report.
4. Select **Run Search**. All of the reports that fit the ACP and All Values criteria display.
5. Find the report you need in the **Report** column and then look in **Report Description** column to read a description of the report you want to learn about.

NOTE: In the Program(s) column of the table, you will see a list of all programs that use the report type you selected, not just ACP.



### TIPS:

- **Detailed Reports:** Provides a list of specific case and participant information.
- **Summary Reports:** Provides counts/summary for criteria for a specific grant.

You have completed the Creating a List of Pre-Set Reports procedure.

## Selecting Criteria to Run Reports

This procedure begins on the Report Search page.

1. In the **Reports** column, select the report you need. The [Report Name selected] Detail Report page displays.
2. In the *Initial Criteria* area, in the **Scope** drop-down list, select:
  - **COFFR level**, if you want a report for all agencies that get a particular grant, not just your agency.
  - **Agency level (most common)**, if you want a report on all staff within your agency doing data entry for the funding source you choose.
  - **Staff level**, if you want a report on only one or more staff member within your agency doing data entry for the funding source you choose.
  - **All Options**, if you want to a report on multiple agencies, COFFRs, and staff doing data entry for the funding type you choose.

NOTE: You will have options depending on your WF1 access level.



**TIPS:**

- Select the link, “Which Scope and Funding selection should I make?” on the page to help make the correct selections for steps 2 and 3.
- If you need a report at a higher level than you see displayed, contact your program administrator.

3. In the **Funding** drop-down list, select:

- **Funding Stream level** if you need grant-specific data. (Most common option for ACP grants.)
- **Program level** and **Funding Stream Category level**, if you need data for all grants funded through ACP.
- **Custom Program level**, if you want data on a special grant (or grants) that is custom built. ACP no longer uses this option.

NOTE: Options will depend on your WF1 access level.

4. Select the **Include past programs, projects, staff, agencies, and locations in the criteria drop-down selection** checkbox if you want to run a report for a funding stream that has expired.

5. Select **Next**. The [Report Name selected] Detail Report page displays showing the selected initial criteria for Scope and Funding in the *Initial Criteria* area, and other fields that need to be completed.

6. Complete all fields on the page. Required fields are indicated by an asterisk (\*).

NOTE: Depending on the options you select, more fields display.



**TIPS:** These tips may apply depending on the report you selected.


- **Date Type:**

- **Served:** Shows clients open during the selected time period. Recommended so you get a report of everyone served.
- **Activity:** Shows clients who were opened and had an activity assigned to them in the selected time period.
- **Enrollment Date:** Reports all participants who have an enrollment date that is less than or equal to the date entered.
- **Exit:** Shows clients who have an exit date.
- **Start Date** and **End Date:** Date span that a person was enrolled and access services that were previously reported.
- **Activity Assignment:** Reports staff assigned to one or more activities during the dates provided.
- **Case Assignment:** Reports staff assigned during the dates provided.
- **Program Year:** A year that runs from July 1st through June 30th that is used as a period of performance evaluation.

7. Select **Run Report**. The report you requested displays.

If you wish to export the report continue with step 8 below.

### Exporting the Report

8. Select the floppy disk icon () (Export drop-down menu). Options display.
9. Select **CSV** for the report to display in an Excel spreadsheet if you need a detailed report.  
OR  
Select **PDF** if you need a summary report.
10. Save the file to your preferred location.

You have completed the Selecting the Correct Pre-Set Report procedure.

## Creating Customized Reports Using Advanced Search

Sometimes you will need to generate reports that contain very specific criteria not available through one of the pre-set reports. You can produce these types of reports using the Advanced Search function in WF1.

This section covers how to create customized reports in general followed by how to create two customized reports that are often generated by users of the ACP Program.

### Creating Advanced Search Reports (General Procedure)

Below are the general steps to create reports using Advanced Search. Alter these steps to generate reports with specific data.

This procedure begins on any page in Workforce One (WF1).

1. In the top menu, in the Search drop-down list, select **Advanced Search**. The Advanced Search page displays.
2. In the **Scope** drop-down list, select the option that matches your user access.
3. In the **Funding** drop-down list, select one of the options below, and then select **Next**.

NOTE: You will have options depending on your access level for WF1.

- **Program level**, if you need all data for the program.
  - **Funding Stream Category level**, if you need data for a funding source such as WIOA Adult Formula, WIOA Adult project, WIOA Dislocated Worker Formula, or WIOA Dislocated Project.
  - **Funding Stream level**, if you need data on a specific funding stream such as a specific program year allocation.
  - **Custom Program level**, if you want data on a direct appropriation or any other funding stream not directly tied to a program in WF1.
4. Select the **Include past programs**, projects, staff, agencies, and locations in the criteria drop-down selection checkbox if you want to run a report for a funding stream that has expired.
  5. Complete all fields on the page based on the criteria you need. Required fields are indicated by an asterisk (\*).

6. Select **Run Search**. The Advanced Search Results page displays with your report.  
OR  
Select **Save Search** If you want to save this search. See Saving Searches below.

You have completed the Creating Advanced Search Reports (General Procedure).

## Example Reports Using Advanced Search



### EXPERT ADVICE:

- If you need more help with customized reports beyond what is in this section:
  - Go to the Resources menu, select User How-To Guides, and open the Advanced Search Saved Search User Guide.
  - Enroll in Advanced Search and Reports training offered through the WF1 team for more information.
  - See your manager for other information and local policies.

**Example 1:** The number of ACP Program participants who were enrolled during a calendar year, who were homeless Veterans, and exited with a successful exit reason.

1. In the top menu, in the Search drop-down list, select **Advanced Search**. The Advanced Search page displays.
2. In the **Scope** drop-down list, select the option that matches your user access.
3. In the **Funding** drop-down list, select the appropriate option, and then select **Next**.  
NOTE: Your options depend on your access level for WF1.
4. In the *Criteria Related to My Profile* area:
  - In the **COFFR** drop-down list, select the COFFR you want
  - In the **Funding Stream** drop-down list, select your ACP grant.
5. In the *Refine Program Criteria* area, in the drop-down list, select **Served Date**.
6. Select **Add Criteria**. The Served Date fields display.
7. In the **Served Date** fields, enter the calendar year for which you want data.
8. In the *Person/Demographic* area, in the drop-down list, select **Homeless**.
9. Select **Add Criteria**. The Homeless field displays.
10. In the **Homeless** drop-down list, select **Yes**.
11. In the *Person/Demographic* area, in the drop-down list, select **Veteran Status**.
12. Select **Add Criteria**. The Veteran Status field displays.
13. In the **Veteran Status** drop-down list, select **Veteran**.
14. In the *Exit Criteria* area, in the drop-down list, select **Exit Reason**.
15. Select **Add Criteria**. The Exit Reason field displays with Select/Deselect under the drop-down list field.
16. Select **Select/Deselect**. The **Exit Reason** box displays.

17. Select the checkbox next to the following exit reasons:

- Called Back
- Entered Armed Forces
- Entered Registered Apprenticeship Training
- Entered Unsubsidized Employment
- Remained Employed
- Started Business/Self-Employed

18. Select **Continue** to close the Exit Reason box.

19. Select **Run Search**. The report displays.

You have completed Example 1.


**Example 2:** The number of currently enrolled participants who have not had live contact with their employment counselors within a certain timeframe.

1. In the top menu, in the Search drop-down list, select **Advanced Search**. The Advanced Search page displays.
2. In the **Scope** drop-down list, select the option that matches your user access.
3. In the **Funding** drop-down list, select the appropriate option, then select **Next**.  
NOTE: Your option depends on your access level for WF1.
4. In the *Criteria Related to My Profile* area:
  - In the **COFFR** drop-down list, select the COFFR you want
  - In the **Funding Stream** drop-down list, select your ACP grant.
5. In the *Refine Program Criteria* area, in the drop-down list, select **Served Date**.
6. Select **Add Criteria**. The Served Date fields display.
7. In the **Served Date** fields, enter the dates for which you want data.
8. In the *Refine Program Criteria* area, in the drop-down list, select **Case Status**.
9. Select **Add Criteria**. The Case Status Date fields display.
10. In the **Case Status** fields, enter **Enrolled**.
11. In the *Case Note Criteria* area, in the drop-down list, select **Contact Type Since Date**.
12. Select **Add Criteria**. The Contact Type Since Date field displays.
13. In the **Contact Type Since Date** field, enter the date you need. For example: if today is March 1 and you want to see the participants who have not had live contact for about 90 days, you would enter December 1 of the previous year.
14. Select **Run Search**. Look at the report online.

You have completed Example 2.

## Exporting a Report

This procedure begins from any Advanced Search Results page.

1. Select the floppy disk icon () (Export drop-down menu). Options display.
2. Select **Select All** to place a checkbox in all records in the report.
3. In the Select Action drop-down list, select Export to Excel, and then select **Complete Action. The Export Advanced Search Results box displays**. Each selection becomes a sheet in your Excel file.
4. Select **OK**. A box displays with viewing options.
5. Choose how you want to view the report. The report displays as you requested.

You have completed the Exporting a Report procedure.

## Saving Searches for Future Uses

Once you create a customized report using Advanced Search, you can save it and use it again. However, you can select what criteria to retain the next time you run the report and what criteria to re-select next time the report is run.

This procedure begins from any Advanced Search Results page.

1. In the **Search Name** field, type a name that summarizes the report.
2. In the **Description** field, type what the report includes in one or two sentences or phrases.
3. Select **Spell Check** and correct any spelling errors.
4. Select **Save**. The report displays in a list.

You have completed the Saving Searches for Future Uses procedure.

## Navigating to Cases within Advanced Search Reports

After generating an Advanced Search report, you can navigate to a specific case in the report results, review or make changes to it, and then navigate back to the report. You cannot navigate to specific cases in pre-set reports.

This procedure begins from any Advanced Search generated report containing specific cases.

1. Select the name of the participant you need to navigate to their record. The person's At-A-Glance page displays.
2. Navigate to any pages within the case you need and make any necessary changes to the record, including writing case notes.
3. To return to the report, on the bottom of the At-A-Glance page, select **Advanced Search**. The Advanced Search report re-displays.

You have completed the Navigating to Cases within Advanced Search Reports procedure.

# Appendix – Enrolling a Person into the Program

## Person Search

1. From the main menu, select **Search** and select **Person**. The Person Search page displays.
2. Complete the fields with information that will help identify the person you need.



### TIPS:

- Enter the person's social security number. If no results are shown search by a person's full legal name. Example, search for Jonathon for John or Jon.
- Columns or rows in blue font can be sorted to locate the person faster.
- The wild card tool allows you to filter by the first few letters of the person's name or other information. For example, Wei\*.

3. Select **Run Search**. The person you need display, or a list will display.
4. Select the person you need. The Person At-A-Glance page displays.

[Select here to return to Creating a Person Record.](#)

## Family Status Explanation Chart

Exit Reason	Explanation
Individual without Dependents	Single person, lives alone.
Other Family member	Lives with spouse, partner, or other family member.
Parent in One Parent Family	Person is a single parent living with a child
Parent in Two Parent Family	Lives with spouse, partner, or other family member and a child.

[Select here to return to Completing Enrollment and Entering Initial Activities, step 1.](#)

# Appendix – Creating and Updating an IEP

## Sample IEP

The next three pages show a sample IEP online template.

NOTE: The requirements for IEPs at your agency may differ from what appears below.

Adult Career Pathways Employment Plan			
<b>Full Legal Name</b>	Jennell Block	<b>Record ID</b>	202013585
<b>Start Date</b>	03/01/2022	<b>Review Date</b>	05/01/2022
<b>Goal</b>	Long Term Goal: this is normally an employment goal	<b>Date Achieved</b>	
<b>Start By</b>	3/1/2022	<b>Expected Completion By</b>	
	Short Term Goal: this is often pre-employment goals, training plans	<b>Date Achieved</b>	
ACTIVITY Barriers			
<b>Start By</b>	3/1/2022		
<b>Jennell Block's Action Steps</b>			
	<ul style="list-style-type: none"> <li>Personal: Review all Barriers available with Participant and create goals or a plan to overcome those barriers.</li> </ul>	<b>Date Achieved</b>	
ACTIVITY Child Care			
<b>Start By</b>	03/01/2022		
<b>Jennell Block's Action Steps</b>			
	<ul style="list-style-type: none"> <li>Look for and get child care by If Applicable be sure to include in IEP.</li> </ul>	<b>Date Achieved</b>	
ACTIVITY Assessment			
<b>Start By</b>	3/1/2022		
<b>Jennell Block's Action Steps</b>			
	<ul style="list-style-type: none"> <li>CASAS (Life Skills): 01</li> <li>GAIN: 01</li> <li>Strength Finder: 00</li> <li>TABE (7-8, 9-10): 00</li> <li>TABE CLASE-E: 00</li> </ul>	<b>Date Achieved</b>	
<b>Comments</b>	Indicate results of all grade level and objective assessments administered to participant.		
	If scores are low, present a plan to increase		
ACTIVITY Employment			
<b>Start By</b>	3/1/2022		
<b>Jennell Block's Action Steps</b>			
	<ul style="list-style-type: none"> <li>Complete and submit cover letter to job counselor/case manager.</li> <li>Complete and submit resume to job counselor/case manager.</li> <li>Cooperate with post-placement follow-up.</li> <li>Make a list of networking contacts.</li> </ul>	<b>Date Achieved</b>	
<b>Name:</b>	Jennell Block	<b>Page 1 of 3</b>	<b>Run Time:</b> 3/4/2022 12:43:54 PM
<b>Record ID:</b>	202013585		



## Adult Career Pathways Employment Plan

<b>Employer/Site</b>	ABC Electronics	<b>Start By</b>	03/01/2022
<b>Position</b>		<b>Wage</b>	12.50
<b>Hours</b>	25 Per Week		
<b>Subsidized</b>	No		
<b>Comments</b>	Indicate all job search and/or employment related activities the participant must submit including copy of paystub for employment verification purposes.		

### ACTIVITY Training

<b>Start By</b>	3/1/2022	<b>Expected Completion By</b>	5/1/2022
-----------------	----------	-------------------------------	----------

#### Jennell Block's Action Steps

- |  |                      |
|--|----------------------|
| • Attend all scheduled classes.  | <b>Date Achieved</b> |
| • Attendance required daily.   | <b>Date Achieved</b> |
| • Maintain regular contact with my job counselor/case manager.                                   | <b>Date Achieved</b> |
| • Make satisfactory progress toward completion and remain in good standing with the institution. | <b>Date Achieved</b> |
| • Must maintain satisfactory progress.   | <b>Date Achieved</b> |

<b>Institution</b>	My Organization	<b>Type of Training</b>	
<b>Start By</b>	3/1/2022	<b>Expected Completion By</b>	5/1/2022

**Comments** Participant to attend specific ACP training program from \_\_\_ to \_\_\_ 9am-12pm virtually and maintain acceptable attendance.  
Participant agrees to continue to meet with Navigator once per week on Thursday at 1:00pm to check in on progress.  
Upon conclusion of training, participant agrees to submit copy of certificate or credential.

### ACTIVITY Support Services

<b>Start By</b>	3/1/2022
-----------------	----------

#### Jennell Block's Action Steps

- |  |                      |
|--|----------------------|
| • Capture the participant's support service plan that will allow participants to overcome barriers to employment and/or training. Individual gas/bus cards do not need to be documented on the IEP, but should include the participant need for transportation assistance. Individual issuance of bus/gas cards must be documented in WF1 under Case Notes and Support Services. | <b>Date Achieved</b> |
|--|----------------------|

### ACTIVITY Transportation

<b>Start By</b>	3/1/2022
-----------------	----------

#### Jennell Block's Action Steps

Name: Jennell Block

Page 2 of 3

Run Time: 3/4/2022 12:43:54 PM

Record ID: 202013585

- Add in any possible transportation assistance that may be provided to the participant and the reason it would be provided. **Date Achieved**  
Capture the participant's support service plan that will allow participants to overcome barriers to employment and/or training.  
Individual gas/bus cards do not need to be documented on the IEP, but should include the participant need for transportation assistance. Individual issuance of bus/gas cards must be documented in WF1 under Case Notes and Support Services.

---

**ACTIVITY      I understand that or agree to:**

---

**Start By**                      3/1/2022

**Jennell Block's Action Steps**

- Notify job counselor/case manager of changes in address, phone, or situation. **Date Achieved**
- Respond promptly to e-mails, calls, or letters from my job counselor/case manager. **Date Achieved**
- Stay actively enrolled in program. **Date Achieved**
- To cooperate with post-placement follow-up. **Date Achieved**
- 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. **Date Achieved**
- Work toward successfully completing my goals. **Date Achieved**

**Comments**                      Participate in the above activities 200 hours per month.

- Turn in completed activity log on a When training is completed basis.
- Maintain regular contact with my Employment Counselor: In-person
- Get verification from my medical doctor or psychiatrist with a "Request for Medical Opinion" (DHS-2114) form, if illness or injury prevents me from job search, education or work for more than one week.
- Accept any offer of suitable employment

---

<b>Job Counselor/ Case Manager</b>	Ann Meyers (651) 555-1212 (Work) ann.meyers@state.mn.us.mn.us	<b>Service Location</b>	Hennepin Cty Hennepin County 300 So Sixth Street Minneapolis, MN 55487
--	---	-------------------------	---

**Client Signature:** \_\_\_\_\_ **Date** \_\_\_\_\_

**Job Counselor/Case Manager  
Signature:** \_\_\_\_\_ **Date** \_\_\_\_\_

**Others Involved in Plan  
Development Signature:** \_\_\_\_\_ **Date** \_\_\_\_\_

[Select here to return to Adding an Individual Employment Plan.](#)

## Appendix – Entering Support Services

### Support Services

Support Service	What it is
Books	Books to complete a training program, which is not covered by tuition/fees.
Child and Dependent Care	Costs associated to the care of a child or dependent in order for them to participate in activities approved in the individual employment plan.
Counseling; Personal, Financial, Legal	Costs associated with personal, financial, or legal counseling not covered by insurance.
Driver's License Initial/Renew – Non CDL	Costs to obtain or renew personal driver's license in order to obtain or maintain employment.
Education Testing	Education testing which is not part of a formal training program.
Emergency Financial Assistance	A payment necessary to stabilize the participant in order to be able to complete training and/or employment goals.
Housing and Rental Assistance	Payments to vendors on behalf of the participant in order to obtain or sustain permanent housing.
Incentive	Non-cash vendor (gift) card (i.e. retail, bus, or gas-only cards) to a participant for successful participation and achievement of expected outcomes as defined in the approved workplan and the Individual Employment Plan (IEP). See <a href="#">Cost Category Guidance</a> , Incentive Stipends Policy section.
Medical Services	Expenses for costs including dental, health care, health insurance, drug & alcohol counseling, personal counseling, or other medical services.
Occupational License Fees	Costs associated with obtaining or maintaining a professional occupational skills license.
Other Services	Other costs associated with the participant to obtain, maintain, or complete employment related activities as outlined within their Individual Employment Plan.
Stipend	Fixed, regular monetary payment to the participant for ongoing, successful participation in the program. For most ACP programs, stipends are not allowed. Stipends are only allowed in the Minnesota Tech Training Pilot Program. See <a href="#">Cost Category Guidance</a> , Incentive Stipends Policy section.
Supplemental Training Materials	Books, fees, supplies, etc. to complete a training program, which is not covered by tuition/fees. Note: tuition/fees are not recorded as a direct participant expense under support services, rather, it is a training cost. Example: Participant is enrolled in a phlebotomy

Support Service	What it is
	training and needs supplemental materials above and beyond the required course materials in order to successfully complete training.
Temporary Shelter	Emergency housing for a participant experiencing housing instability insecurity.
Tools and Clothing	Tools and clothing required for job interviews or to sustain employment. Note: Tools and clothing required as part of a training program are not a support services, but rather a direct customer training expense.
Transportation	Costs associated to transportation to complete training, interview for a job, or sustain employment.

[Select here to return to Entering Support Services, step 2.](#)

## Appendix – Opening and Closing Activities

---

### Activity Definition and Timing Tables

Use this table to find definitions of activities, to determine when it is appropriate to use an activity.

#### Initial Required Activities

Activity name	Explanation	Use this activity...
Assessment	An evaluation of the person's capabilities, interests, needs, and vocational potential.	At time of enrollment
Career Counseling	Facilitated exploration of occupational and industry information that will lead to a first, new, or better job for the job seeker. This can include career planning, case management, individual or group mentoring performed by the counselor, and other one-on-one services to assist a participant during program participation.	At time of enrollment
Individual Plan Development	Use when the service provider and participant jointly create their Individual Employment Plan (IEP), which outlines the responsibilities of both the participant and the service provider as the participant prepares to achieve the program goal of full-time, long-term, unsubsidized employment at the most realistic and highest possible wage. This activity is to remain open until the participant has exited the program.	At time of enrollment once a participant has developed and signed an IEP. This activity may remain open or updated until the participant has exited the program.

[Select here to return Required Services \(Activities\).](#)

## Case Management and Training Activities

Activity	Definition	Notes
ABE/Remedial Training	This activity is to be used for participants accessing Adult Basic Education (ABE) services	Attending an ABE program as a part of their IEP
Adult Diploma Program (ADP)	Training to obtain an Adult Diploma Program (ADP)	Attending an ADP program as a part of their IEP
Apprenticeship	A combination of on-the-job training and related instruction in which workers learn the practical and theoretical aspects of a skilled occupation	Program must be a federal/state registered program (DOL/DOLI)
Basic Skills Instruction	This activity is to be used for participants accessing Adult Basic Education (ABE) services which include basic essential and educational skills	Services must be in line with Mn ABE
Bridge Training (P2P only)	Open at the time the participant begins a training program that DOES provide an occupational skill credential at the completion of training. Training program must be Minnesota Office of Higher Education compliant	Training program must be Minnesota Office of Higher Education compliant or exempt
Career/Education Counseling (MFRP only)	Open at the time the participant and Navigator/Counselor meet one-on-one to develop employment goals.	For MFRP program only
Credentialed Coursework/Training	Open at the time the participant begins a training program that DOES provide an occupational skill credential at the completion of training. Training program must be Minnesota Office of Higher Education compliant	Training program must be Minnesota Office of Higher Education compliant or exempt
Customized Cultural Program	Open for a training program that is culturally specific	Organization specific training
Employed Full-Time	Full-time job placement that occurs prior to enrollment in program and/or during or after completion of the program	32 hours or more per week

Employed Part-Time	Part-time job placement that occurs prior to enrollment in program and/or during or after completion of the program	Less than 32 hours per week
ESL/ELL Training	Open when participant is provided training in English as a Second Language (ESL)/English Language Learner (ELL)	Attending an ESL/ELL program as a part of their IEP
Financial Literacy Education	Open when participant is provided training to develop skills for making informed decisions about personal finances	May include budgeting, credit counseling or financial planning
GED Training	Open when participant is provided training to obtain a General Educational Development diploma (GED)	Attending a GED program as a part of their IEP
Holding	Use for participant who are temporarily unable to actively participate in the program but intend to return within 90 days.	Limited to 90 days
Individual Training Pathway (P2P only)	Use for participant enrolled in Pathways to Prosperity (P2P) to indicate a credential or post-secondary credit will be attained at the completion of training. Training program must be Minnesota Office of Higher Education compliant	Training program must be Minnesota Office of Higher Education compliant or exempt
Job Club (MFRP only)	Use for participant who is actively seeking employment and are actively participating in supervised job search sessions	For MFRP program only
Job Search	Use for participant who is actively seeking employment through submission of applications and interviewing	
Life Skills Development (MFRP only)	Use for participant who is actively attending life skills development sessions/classes	For MFRP program only
Local Flag	Use as a placeholder while participant obtains the required eligibility documents for specific programs	
Non-Credentialed Training	Use for training programs that DO NOT provide an occupational skill credential at the completion of training	

OJT - Public or Private	On the Job Training, (OJT) is a work placement made through a contract with an employer in the public, private non-profit, or private sector. An OJT contract must be limited to the period of time required for a participant to become proficient in the occupation for which the training is being provided. The OJT Service Provider provides the Employer with a partial wage reimbursement, typically up to 50 percent of the wage rate of the participant for the extraordinary costs of providing the training and supervision related to the training.	
On-Ramp Training	Use for participant enrolled in Pathways to Prosperity (P2P) program Models 1 to indicate a certificate will be attained at the completion of training	
Orientation	Use at the time participant attends group orientation sessions for enrollment into the program	
Paid Work Experience	Use when a participant is in a temporary paid employment experience in the public, private nonprofit, or private sector	
Partnering (MFRP only)	Use when a participant has been referred to a partnering program for services	
Personal Counseling (MFRP only)	Use for participant who is actively attending personal counseling sessions/classes	
Pre-Employment Preparation (MFRP only)	Use for participant who is actively attending pre-employment preparation sessions/classes	
Referral/Invite (MFRP only)	Use when a participant has been referred to an outside program or services	
Remedial Education (MFRP only)	Use for participant who is actively attending remedial education sessions/classes	
Retention	Use to keep the program sequence open after participant has gained employment in order to provide continued support in the first 90 days on the job. This could include career counseling, support services, or other necessary resources to assist the participant in maintaining employment	



Self-Employment (MFRP only)	Self-Employment job placement that occurs during or at the completion of the program	
Self-Employment Training	Activity that improves the employability of participants by providing training in setting up and operating a small business or other self-employment venture	
Uncompensated Work Experience	Use when a participant is in a temporary unpaid employment experience in the public, private nonprofit, or private sector	
Work Readiness Skills Training	Use when a participant is in training that includes job seeking skills, interview skills, soft skills, and other pre-employment trainings provided	

[Select here to return to Opening and Closing Activities.](#)

[Select here to return to Entering Training Activities.](#)

## Writing Case Notes

A Case Note provides the story to the entries you make into WF1. Enter a case note when your entries into the system alone do not tell the reasons behind the data entry.

### What is a Case Note?

Case notes are a written record of a person's case in WF1. They:

- Document events that happen to a person.
- Explain the reasons why actions were taken on behalf of the person.
- Explain why certain data was entered into their WF1 record.
- Can be marked Private so that only you can read this note.

### Enrollment/Preliminary/Intake case note.

The required enrollment/preliminary/intake case note must include:

- **Participant current situation:** including skills, barriers to gaining employment (i.e., lack of certification/training, unstable housing, dependent care, transportation), work history, current work situation (employer name, title, wage, number of hours worked per week), family status, justification for enrollment,
- **Participant goals:** including goals from IEP, steps participant will work towards to achieve those goals, and how training program will assist in meeting those goals
- **Support Services and/or Referrals** that program will provide to participants to assist in achieving employment goals

### When to Write a Case Note

Write a case note every time you find out that something happened to the person.

- If you do something on the person's behalf, such as:
  - Submit a resume to a job bank.
  - Sign them up for a class not tracked in WF1.
  - Provide any services or referrals (write why you provided the service or referral).
- If the person:
  - Contacts you for help or to tell you something that happened to them
  - Communicates with you or you communicate with them using the phone, email, or text.
  - Meets with you for any reason.
  - Submits a document to you via email or fax, or in paper (hardcopy).

### How to Write an Effective Case Note

Follow these guidelines when writing a case note.

- **Simple:** Write exactly the facts of what you did on the person's behalf. Use short, simple, and complete sentences. **Keep It Simply Simple**
- **Brief:** Keep the case note just a few sentences.

- **Understandable:** Do not use clichés, street talk, or jargon that someone reading the note may not understand.
- **Factual:** Write just the facts of what happened. Don't write opinions or predict what they might do. Don't use stereotypes as you describe the person or what happened.
- **Relevant:** What you write should be meaningful and important. For example:
  - **Behavior:** Describe the client's behaviors only if it is important. Don't try to diagnose or explain why the person behaved a certain way.
  - **Quotes:** If writing down what the person said will help make the case note be more accurate, either paraphrase what was said OR if you wrote down their words exactly as they were talking and are sure you wrote what they said, use quotation marks around their words to document what they said.
- **Spellcheck:** Always use the spell checker to find and fix spelling errors.

### **EXAMPLE: CORRECT CASE NOTE EXAMPLE**

Client showed up on time to our planned meeting today, July 10, 2019, at 11 AM to review his progress in applying for jobs as a barber. He stated that he is struggling to get interviews but has applied to 5 jobs since our last meeting. He expressed frustration and appeared agitated at the beginning of the meeting but seemed more relax once I stated that we should take a look at his resume and see if it needs to be changed. I suggested that he attend the resume advanced writing class at the CareerForce\_Center on August 8, 2019, at 2 PM. He submitted his barbering certificate from his country of origin for our records. I suggested we look into updating his training at the local community college.

### **EXAMPLE: INCORRECT CASE NOTE EXAMPLE (same situation as above),**

Client showed up on time, but wasn't shaven and reeked of smoke, no wonder he's not getting work let alone an interview. He wouldn't look me in the eye and complained that it "sucked" that he was out of a job. Then I said let's roll up our sleeves and get started. We fixed his resume, and he gave me his barbering certificate that was from a school in Jamaica where he's from. If he doesn't get training in the US, he'll never get a job. Anyway, he's submitted five resumes since the last time we met. I suggested that he attend the resume advanced writing class at the CareerForce\_Center in early August and I said he should go to the local community college to get a new barber certificate because no wonder no one will hire you.

## **Procedure for Writing a Case Note**

This procedure starts from any page in the person's record.

1. In the left navigation bar, in the *Case Note* area, select **Add Case Note**. The Case Note Add page displays.
2. Complete all fields on the page. Required fields are indicated by an asterisk (\*).



**TIPS:** These tips are for some fields on Add Case Note page.

- **Event Date:** Enter the date the activity or service took place.

- **Note Viewable By:** Select the level of privacy for the note. Select private if you wrote about sensitive information, e.g., alleged, or actual domestic violence.
- **Staff Associated:** Select your name or the responsible staff member.
- **Category:** Select the option that best matches the situation. To select more than one, select Select/Deselect. Checking the boxes next to categories you need, and then select Continue.
- **Contact Method:** Select how contact was or will be made in reference to this case note, e.g., by email, phone, or in person.
- **Contact Type:** Select the appropriate option.
- **Subject:** Write a brief summary in a few words that describes what the case note is about, e.g., "Job Referral to 4 jobs in medical technology sector."

3. In the *Case Note* area, write a case note using guidelines in [What is a Case Note?](#)
4. Select **Spell Check** and fix any spelling errors.
5. Select **Save** or another option, as needed.

You have completed the Entering a Case Note procedure.

[Select here to return to Completing a New Application, step 5.](#)

[Select here to return to Completing Enrollment and Entering Initial Activities, step 7.](#)

[Select here to return to Entering Training Activities, step 14.](#)

[Select here to return to Entering Case Management Activities, step 8.](#)

[Select here to return to Closing Activities, step 5](#)

## Appendix – Exiting a Person

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### Person Search

1. From the main menu, select **Search** and select **Person**. The Person Search page displays.
2. Complete the fields with information that will help identify the person you need.



#### TIPS:

- Enter the person's full legal name.
- Columns or rows in blue font can be sorted to locate the person faster.
- The wild card tool allows you to filter by the first few letters of the person's name or other information. For example, Wei\*.
- Whenever possible, search using the person's social security number.

3. Select the **Run Search** button. The person you need displays or a shorter list from which to select the person you need displays.
4. Select the person you need. The Person At-A-Glance page displays.

[Select here to return to Exiting a Person from WF1, Step 1.](#)

### Exit Reasons Explanation Chart

Exit Reason	Explanation
ABE/Remedial Education (MFRP only)	The participant is enrolled in an ABE program and no longer requires employment services
Attained Pre-Employment Skills (MFRP only)	The participant has completed requirements of pre-employment skills training and no longer requires employment services
Cannot Locate	The participant has not responded to requests for contact for 90 days (or less, depending on local policy)
Certificate Program (MFRP only)	The participant is enrolled in a certificate program and no longer requires employment services
Completed Family or EDP Objectives (MFRP only)	The participant has completed family goals of EDP and no longer requires employment services
Completed Program Objective	The participant completed training and earned the corresponding certificate/credential/licensure, pre-employment skills, or other work plan objectives though has not entered employment prior to exit
Continued Education (MFRP only)	The participant is enrolled in an education program and no longer requires employment services
Death	The participant has passed away

Degree Program (MFRP only)	The participant is enrolled in a degree program and no longer requires employment services
Developing Life Skills (MFRP only)	The participant has completed the goal of developing life skills and no longer requires employment services
Employment (MFRP only) *	The participant has entered new employment or has received a promotion or increase in wage as a result of training and is no longer in need of program support  Do not use this exit reason when a participant retains the same employment, position, or wage that was held at time of enrollment
Entered Armed Forces	The participant has enlisted in any branch of the military
Entered Unsubsidized Employment*	The participant has entered new employment or has received a promotion or increase in wage as a result of training and is no longer in need of program support  Do not use this exit reason when a participant retains the same employment, position, or wage that was held at time of enrollment
Family Care Problems	The participant is unable to continue due to a family need not related to their own personal/medical problems
Family Rebuilding (MFRP only)	The participant has completed the goal of rebuilding family and no longer requires employment services
Found Ineligible	The participant has not met the minimum eligibility requirements and must be exited. If this exit reason is used, all charges related to the participant's services must be backed out.
Institutionalized	The participant is no longer able to participate in the program due to incarceration in a correctional facility or becoming a resident of an institution which is providing 24-hour support such as a hospital or treatment center for more than 90 days
Moved from area	The participant is unable to continue due to moving from the service area
Other (MFRP only)	The participant's exit reason does not match with any of the other reasons listed
Other termination	The participant's exit reason does not match with any of the other reasons listed
Pay for Performance Placement	The participant has exited to unsubsidized employment and the employment placement is being claimed by the program as a pay-for-performance placement payment.
Personal/medical problem	The participant has their own personal or medical issue preventing them from continuing in the program for more than 90 days
Program/Type transfer	The grant/funding stream has ended, but the participant will continue receiving services through another funding stream/program within the same organization

Refused to Continue	The participant is no longer interested in services offered and did not complete program objectives
Remained in School	The participant is enrolled in an education program and no longer requires employment services
Reservist Called to Active Duty	The participant is a member of the National Guard or other reserve military unit, and they have been called to active duty for at least 90 days
Working with Another Program (MFRP only)	The participant has begun working with another program and no longer requires employment services

[Select here to return to Exiting a Person from WF1, Step 4.](#)