POLICY

DATE ISSUED: October 3rd, 2019

TO: WIOA/DW Vendors

FROM: Workforce Solutions Director

SUBJECT: EDS Implementation

POLICY: It is the policy of Ramsey County Workforce Solutions that all contract vendors providing WIOA/DW Employment & Training, services on behalf of Ramsey County, will use Electronic Document Storage in Workforce One for file management.

PURPOSE: The purpose of this policy is to protect participant's personal information by limiting the use of paper documentation that is easily compromised.

BACKGROUND: **Effective June 2017, the State of Minnesota launched Workforce One (WF1) Electronic Document Storage (EDS) which allows users to upload, search, and view case file documents.** This update to WF1 allow users to work with WF1 as they have in the past while incorporating supporting documentation into the system. Previously this documentation was stored in a paper file or other document management system. The EDS functionality in WF1 allows users, with appropriate privileges, the ability to add, view, edit, comment on, and/or delete EDS documents.

A. BENEFITS OF EDS:

- Allows for the immediate shared and retrieval of documents
- Provides secured document storage for confidential and sensitive information
- Ensures the documents are preserved and do not get lost or damaged
- Gets rid of paper files. No more worrying about storage space issues!
- WIOA/DW files are centrally stored in EDS WF1
- Documents are accessible by all parties who are monitoring and/or providing services to enrolled/co-enrolled WIOA/DW participants
- Ease of case transfer from one agency to another. No need to transfer paper files

B. SUPPORT FROM RAMSEY COUNTY:

- Provide EDS train the trainer with data specialists and site supervisors
- Provide guidance and support through individualized and/or group training as needed
- Distribution of the WF1 EDS user guide
- Answer questions and field EDS concerns

PROCEDURES: The following procedures will be followed to implement this policy. All vendor agencies will provide document scanning equipment to their staff to compile with this policy, and with respective contract with Ramsey County Workforce Solutions.

- All documents related to participant cases will be scanned and saved in EDS. It is recommended that each vendor develop a scanning schedule to ensure that each counselor is allowing time to scan and upload documentation at least one to two times per week. Documents are to be scanned and saved into EDS within 10 business days or receipt or completion.

- There are two technical methods for saving documents into EDS, detailed below.

    EQUIPMENT SCANNER ROUTE OPTIONS: Document scanning and routing will differ between each agency due to scanner type and capacity. However, all documents are individually uploaded into WF1 EDS as defined in the provided WF1 EDS user guide. Scanner route options include:

    Scan to Email:
    1. Direct scanner to send electronic document image to counselor email.
    2. Counselor opens email to save attachment/document to computer (documents must be saved to your computer prior to uploading to EDS).
        • It is recommended to create a new folder or on your Desktop titled EDS to store and locate scanned documents
    3. Save document with the participants name and a brief description for ease in locating correct document. (Document Name example: Employment Plan, John Doe)
    4. Open case record on WF1
    5. Locate EDS on left side menu – Select Add Document
    6. Select current Program Sequence
    7. Choose EDS Document Type from list of options
    8. Select file to be uploaded. Locate scanned document by choosing "Browse" and navigate to saved document (example: Desktop – EDS - Employment Plan, John Doe - Open)

9. Document will now appear next to "Select a File" on WF1 EDS.

10. Select Next and follow directions provided by EDS user guide.

Scan to Desktop:

1. Direct scanner to send document image to desktop.

2. Save document to computer. It is recommended to create a new folder or on your Desktop titled EDS to store and locate scanned documents

3. Follow steps 3 – 10 as listed above.

- Original documentation is retained for 90 days after entry into EDS. After 90 days, documentation can be shredded. This is to ensure that documents are accessible, readable, etc. prior to destruction.

- Enrollment documentation and opening assessments, plans etc. may be saved together as one document entitled "Opening".

EFFECTIVE DATE: November 1st, 2019

CONTACT PERSON: Agency Planner