

# Workforce One

## Application & Enrollment User Guide

### Adult/Dislocated Worker (DW)

October 2019



This training guide indicates the WF1 process that will be completed by the agency **Data Specialist** and/or the **Adult/DW Employment Counselor**

Refer to the following policies for additional information

- **Enrollment**
- **Internal Case File Monitoring**

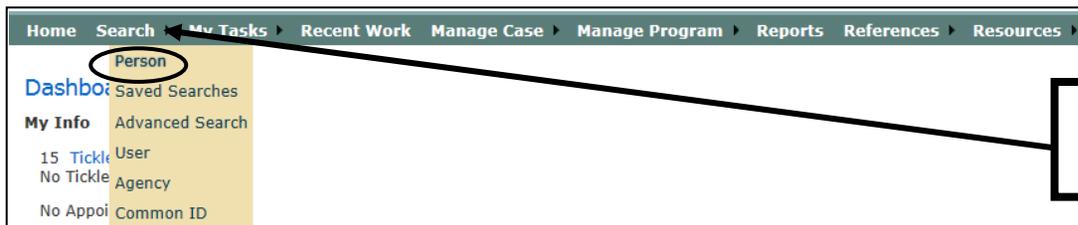
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# PERSON SEARCH

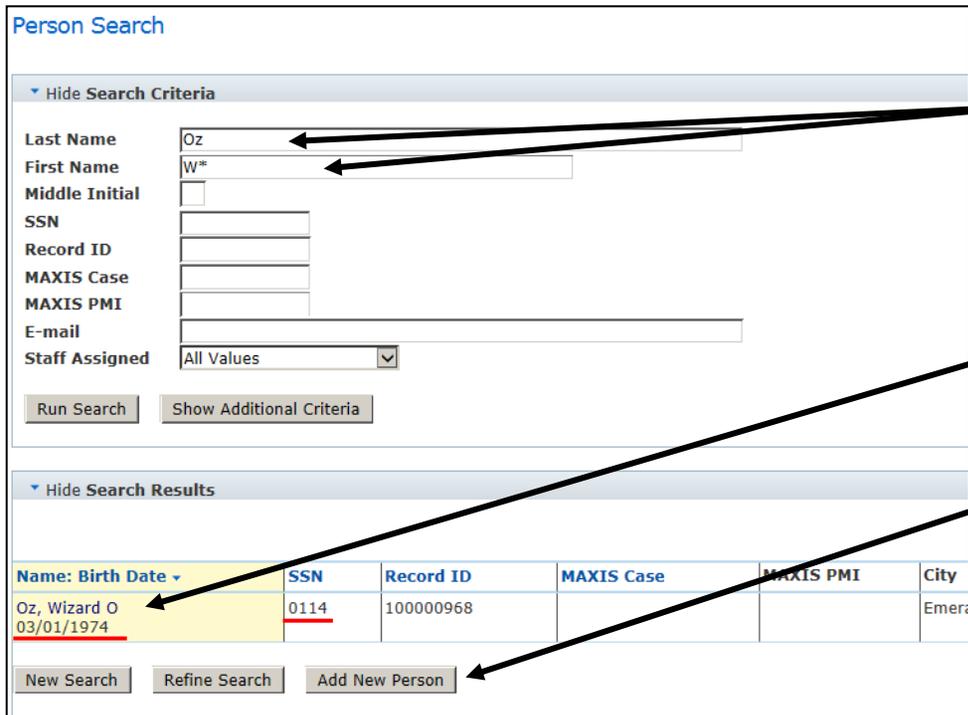
A **Person Search** must be completed on all participants by participant's **name and then by social security number**. Searching by both the name & then the SSN will hopefully prevent duplicate records from being entered in WF1.

NOTE: This guidance indicates the process to follow if the agency has a **Data Specialist**.  
If no **Data Specialist**, the **Employment Counselor** would complete all steps.

The assigned **Employment Counselor** will submit a completed **WF1 Adult & DW Enrollment Form** to the **agency Data Specialist** within 10 days of the **Employment Counselor** and the participant completing intake, and the **Employment Counselor** determining program eligibility. The **agency Data Specialist** will enter the enrollment in WF1 within 2 days of receiving the complete **WF1 Adult & DW Enrollment Form**.



From the top navigation:  
**Click** on **Search**, then **click** **Person**



**Enter** the **search criteria**.

The Last Name and First Name fields each allow a single wildcard character (an asterisk \*) in the search. For example, searching a Last Name with John\* will return all customers with a last name that begins with John (e.g. John, Johnson, etc.).

If the person is found (review the DOB & last 4-digits of the SSN), **click** on the appropriate person's **name** to access the record.

If the person is not found, click **Add New Person**

## ADD NEW PERSON

The **Add New Person** will only be used when an existing record for the person is not found in WF1. If the participant already has an existing record in WF1, proceed to page 3.

The information highlighted below must be completed on the **WF1 Adult & DW Enrollment Form** that the **Employment Counselor** submits to the **Data Specialist**, as it is used to enter a record in WF1.

**Person Add**

SSN  SSN Verified

\*Last Name  \*First Name  MI

Birth Date

\*Address 1

Address 2

\*City  \*State  \*Zip

\*County  \*Country

Phone	Ext.	Phone Type	If other, please specify:
<input type="text"/>	<input type="text"/>	None Selected <input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	None Selected <input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	None Selected <input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	None Selected <input type="text"/>	<input type="text"/>

Primary E-mail

Secondary E-mail

MAXIS PMI

Confirm MAXIS PMI

MAXIS Case

Confirm MAXIS Case

\*Veteran Status

\*Citizen/Right to Work

The **Data Specialist** will create a WF1 record, or locate an existing record, by entering the required information.

A record may not be completed in WF1 if the **WF1 Adult & DW Enrollment Form** is missing information.

The **Data Specialist** will request the missing items from the assigned **Employment Counselor** via email.

**NOTE:** A person's refusal or inability to show an item that verifies SSN cannot be used to deny service if the person is otherwise eligible to receive services. Contact the **MIS Unit** and they will create a proxy (fake) SSN for the participant's WF1 record.

# PERSON AT-A-GLANCE

The panel below appears after adding a new person record or by clicking on the person's name, if a WF1 record already exists.

**General**

**At-A-Glance**

Contact

Tickler

Demographics

Work Preferences

MN Works Resume

**Case Note**

Add Case Note

Case Note Quick

Case Note Search

**Cases**

Program/New App

Eligibility/Enrollment

Activity

TAA

Plan

Credential

Reporting Collection

Youth Performance

## Person At-A-Glance

**Wizard O Oz** Record ID 100000968

**Birth Date 03/01/1974**

**Name and Mailing Address**

Wizard O Oz

123 Castle Rd

Emerald City MN 55101

The geo-coding search was unable to verify this address. The address is not valid for Work Preferences or Talent Pool Search.

Phone	Ext.	Phone Type	TTY	Video
651-555-9878		Primary	No	No
651-555-8789		Cell	No	No

**Birth Date** 03/01/1974

**Primary E-mail**

**Secondary E-mail**

**Record ID** 100000968 **Last 4 SSN** 0114

Program	Status	Application Date	Enroll Date	Exit Date	Closed from App Date	Last Follow-up Date	COFFR
Adult Seq 1	Exited	05/01/2014	05/13/2014	10/01/2014			Ramsey Cty (15)

The **Person-at-a-Glance** panel provides a list of all programs in WF1 for persons with an existing record, indicating their Program and the Program Status.

# ADD NEW APPLICATION

A new **Application** is added in WF1 indicating the Program once an existing record is found or a new person record has been created.

The image shows two screenshots from a software interface. The top screenshot is the 'Program Summary' page for 'Wizard O Oz' (Record ID 100000968). It features a left-hand navigation menu with categories: General (At-A-Glance, Contact, Tickler, Demographics, Work Preferences, MN Works Resume), Case Note (Add Case Note, Case Note Quick, Case Note Search), and Cases (Program/New App, which is circled). A 'Add New Application' button is highlighted with a callout box. The bottom screenshot is the 'New Application' form for the same individual. It has a progress bar with three steps: 1. Application (active), 2. Eligibility, and 3. Enrollment. The form contains several fields: \*Program (None Selected), \*Application Date (empty), Agency (Ramsey County Workforce Solutions), Display Funding Stream Options (COFFR, Ramsey Cty Workforce Solutions - LWDA 15), \*Location (empty), Service Model (None Selected), Primary Staff (None Selected), Support Staff (None Selected), and Send Tickler (checkbox). A 'Continue to Eligibility' button is highlighted with a callout box. Two callout boxes provide definitions for 'Program', 'Application Date', 'Location', and 'Primary Staff' based on the 'WF1 Adult & DW Enrollment Form'.

**Program Summary**  
 Wizard O Oz  
 Birth Date 03/01/1974  
 Record ID 100000968  
 Add New Application  
 Show Adult Seq 1 - Exited

**New Application**  
 Wizard O Oz  
 Birth Date 03/01/1974  
 Record ID 100000968  
 Step: 1. Application 2. Eligibility 3. Enrollment

**Program** = the **Program** that is listed on the **WF1 Adult & DW Enrollment Form**

**Application Date** = the **Date** the participant completed the **WF1 Adult & DW Enrollment Form**

**Location** = **Select the correct location, if not auto-selected**

**Primary Staff** = the assigned **staff's name** that is listed on the **WF1 Adult & DW Enrollment Form**

Click **Continue to Eligibility**.

## ELIGIBILITY

The **Eligibility** panel is completed in WF1 following the WF1 Application. The items below are required to determine if the participant is eligible for the selected Program.

**Eligibility** cannot be determined if the **WF1 Adult & DW Enrollment Form** is missing information.

In the event of missing information, the Program Status will be listed as 'Pending' and the **Data Specialist** will request the missing items from the assigned **Employment Counselor** via email.

**Dislocated Worker Eligibility**

Wizard O Oz  
Birth Date 03/01/1974

Record

Step: 1. Application 2. Eligibility 3. Enrollment

Program Seq 1  
Agency: Location Ramsey County Workforce Solutions: North St. Paul  
Entered by Laurie J Doheny  
Application Date 07/01/2019

\*Decision Date  
\*SSN 810-03-0114  
\*Birth Date 03/01/1974 Age 45  
\*Gender Male  
\*Citizen/Right to Work Citizen  
\*Selective Service Registration None Selected Register for Selective Service  
\*Basis for Eligibility Separated from Employment

Next

Save and Exit Wizard Cancel

**Decision Date = the Date the Employment Counselor determined the participant eligible for the program, as listed on the WF1 Adult & DW Enrollment Form**

NOTE: The Decision Date cannot be prior to the Application Date.

The **Selective Service Number** is required if **Selective Service Registration\*** is listed as **Registered**

**Basis for Eligibility\*\* = Separated from Employment** for most participants

\*\*Other options that may be used when approved by Workforce Solutions' supervisor/manager:

- At Risk of Layoff-Incumbent Worker Training
- Displaced Homemaker
- Military Service

Click **Next**, and the panel on the next page will appear

\*Federal law requires men born on or after January 1, 1960 to register with Selective Service within 30 days of their 18th birthday. The only men not required to register are non-immigrant aliens, men on active duty in the Armed Forces, including students at the military service academies, and individuals incarcerated or otherwise institutionalized. Select "N/A" if the person is a female or a male that is not required to register.

## ELIGIBILITY continued

The following information is required for the DW Program and must be completed on the **WF1 Adult & DW Enrollment Form**.

In the event of missing information, the Program Status will be listed as 'Pending' and the **Data Specialist** will request the missing items from the assigned **Employment Counselor** via email.

**Specific Eligibility Criteria: Separated from Employment**

\*Trade Adjustment Assistance Co-Enrollment  Yes  No

\*Separated from Permanent Employment  Yes  No

\*Actual/Projected Separation Date

\*Received Layoff Notice  Yes  No

Date Received Layoff Notice

\*Mass Layoff  Yes  No

\*Permanent Plant Closure  Yes  No

\*Public Announcement of Closure  Yes  No

\*Separated from Self-Employment  Yes  No

\*Resident of MN at Employment Separation  Yes  No

\*Working in MN at Employment Separation  Yes  No

\*Long Attachment to Workforce  Yes  No

\*Limited Reemployment Opportunities  Yes  No

\*Unlikely to Return to Previous Occupation  Yes  No

\*Weeks Unemployed in Last 52

\*Unemployed for the Last 27 Consecutive Weeks

**Specific Eligibility Criteria: Priority of Service**

Meets Local Priority of Service

Justification for Meeting Local Priority of Service

Spell Check

Determine Results

Save and Exit Wizard Cancel

**Meets Local Priority of Service\* = Yes or No**

\*If **Yes**, the Justification is required. Refer to the **Adult & DW Enrollment Form Field Descriptions** for information

**Click Determine Results** - A person is determined eligible or ineligible based on the laws and policies governing the specific program

If **No** is appearing, the participant has been determined **Ineligible**. The **Data Specialist** will select **Cancel** and will inform the **Employment Counselor**.

**Click Save and Continue to Enrollment**, only if **Yes** is appearing for the program selected on the **WF1 Adult & DW Enrollment Form**

# ENROLLMENT

Shown below is a sampling of items required for **Enrollment** into Adult or DW.

The **Enrollment** cannot be completed if the **WF1 Adult & DW Enrollment Form** is missing information.

In the event of missing information, the Program Status will be listed as 'Eligible, Not Enrolled' and the **Data Specialist** will request the missing items from the assigned **Employment Counselor** via email.

The **Enrollment** panel is populated from the information listed on the **WF1 Adult & DW Enrollment Form**, so the form must be complete

**Enrollment Date\*** = **Date** the participant is officially enrolled in the Program, usually the date of Intake

\*This date cannot be prior to the Decision Date or Application Date

**Eligibility/Enrollment**

## ENROLLMENT continued

The participant is officially **Enrolled** once the following Activities are opened:

1. Staff Assisted Assessment
2. Career Counseling
3. Individual Plan Development

The screenshot shows a form with the following fields and callouts:

- Open Initial Activity** (Section Header)
- \*Activity Type**: A dropdown menu with "Staff Assisted Assessment" selected. Callout: **Activity Type = Staff Assisted Assessment** for the 1<sup>st</sup> activity
- Activity Subtype**: A dropdown menu with "Ramsey WDA-15 PY18 WIOA Adult Formula" selected. Callout: **Funding Stream = the current Funding Stream for staff costs**
- \*Funding Stream**: A dropdown menu (empty).
- Estimated End Date**: A date picker field. Callout: **Estimated End Date** – is optional; however, a Tickler will be created if a date within 90-days of the Activity Start Date is entered on the **WF1 Adult & DW Enrollment Form**, allowing the enrollment to be deleted if no funds have been spent and with Supervisor approval
- Estimated Hours**: A text input field.
- Case Note**: A large text area.
- Buttons**: "Spell Check", "Enroll", "Enroll and Add Another Activity", "Save without Enrolling", and "Cancel". Callout: **Click Enroll and Add Another Activity** to add the **Career Counseling** and **Individual Plan Development** activities

The **Data Specialist** will notify the **Employment Counselor**, via email, that the enrollment is complete. Below is an example of a completed enrollment for **WIOA Adult**.

**Activity Summary**

Wizard O Oz Record ID 100000968  
 Birth Date 03/01/1974

▼ Hide Adult Seq 2 - Enrolled

Enrollment Date: 07/10/2019 Exit Date:

Activity: Subtype: Work Exp Type	Funding Stream	Start Date/End Date	Staff: Agency	Action
Indv Plan Dvpmt	Ramsey WDA-15 PY18 WIOA Adult Formula	07/10/2019 Open	Laurie J Doheny WF Solutions	Edit Delete Copy
Career Counseling	Ramsey WDA-15 PY18 WIOA Adult Formula	07/10/2019 Open	Laurie J Doheny WF Solutions	Edit Delete Copy
Staff Assist Assess	Ramsey WDA-15 PY18 WIOA Adult Formula	07/10/2019 Open	Laurie J Doheny WF Solutions	Edit Delete Copy

## **DELETE ENROLLED PROGRAM SEQUENCE**

Instead of having a negative termination, a WF1 Program Sequence that has been enrolled, may be deleted within 90 calendar days of the **Enrollment** date, by Workforce Solutions' MIS Unit, with Supervisor approval.

NOTE: Program Sequence deletion is not allowed if Support Services or Training funds have been provided to the participant.

Email the following information to your Supervisor and copy the MIS Unit:

- Participant First and Last Name
- WF1 Record ID Number
- Program Name to Delete

The MIS Unit will delete the Program Sequence and enter a Case Note regarding the deletion, once the Supervisor has approved the deletion in writing, via email.