

Workforce One

Application & Enrollment User Guide

MN & WIOA Youth

October 2019



This training guide indicates the process for completing an Application and Enrollment in WF1 for eligible MN Youth ages 14-21, WIOA In-School Youth ages 14-21 & WIOA Out-of-School Youth ages 16-24

Refer to the following WFS Policies for additional information:

- **Case Management**
- **Youth Programming Enrollment Policy**
- **5% Enrollment Window**
- **Referral and Co-Enrollment Process**
- **Migrating ISY to OSY (Guidance)**
- **Youth 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 & SSN will hopefully prevent duplicate records from being entered in WF1.

The screenshot shows the top navigation bar with the following items: Home, Search, My Tasks, Recent Work, Manage Case, Manage Program, Reports, References, Resources. The 'Search' item is highlighted. Below the navigation bar is a sidebar menu with the following items: Person, Saved Searches, Advanced Search, User, Agency, Common ID.

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

The screenshot shows the 'Person Search' form with the following fields: Last Name (Arendelle), First Name (e*), Middle Initial, SSN, Record ID, MAXIS Case, MAXIS PMI, E-mail, Staff Assigned (All Values). Below the form are buttons for 'Run Search' and 'Show Additional Criteria'. Below the form is a table with the following columns: Name: Birth Date, SSN, Record ID, MAXIS Case, MAXIS PMI, City, Current Staff Assigned. The table contains one row: Arendelle, Elsa, 12/21/1995, 2018, 202013374, Frozen City, Doheny, Laurie J, Hanscom, Breanne M. Below the table are buttons for 'New Search', 'Refine Search', and 'Add New 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 (reviewing 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 is required 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:	TTY	Video
<input type="text"/>	<input type="text"/>	None Selected <input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="text"/>	<input type="text"/>	None Selected <input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="text"/>	<input type="text"/>	None Selected <input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="text"/>	<input type="text"/>	None Selected <input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>

Primary E-mail

Secondary E-mail

MAXIS PMI

Confirm MAXIS PMI

MAXIS Case

Confirm MAXIS Case

*Veteran Status

*Citizen/Right to Work

Enter the highlighted information to create a **Person** record.
Click Save.

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

Person At-A-Glance

Elsa Arendelle
Record ID 202013374

Birth Date 12/21/1995

Name and Mailing Address

Elsa Arendelle
987 Icy Road
Frozen 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
651-555-6543		Primary	No	No

Birth Date 12/21/1995

Primary E-mail

Secondary E-mail

Record ID 202013374 **Last 4 SSN** 2018

Program	Status	Application Date	Enroll Date	Exit Date	Closed from App Date	Last Follow-up Date	COFFR
ACP Seq 1	Enrolled	08/20/2018	08/20/2018				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

All participants completing a Youth Application should have an **Application** entered in WF1 within 5 business days of receipt of the Youth Application.

Participants determined eligible for the MN and/or WIOA Youth programs should have an **Enrollment** completed in WF1 within 5 business days of completing intake with the participant.

If the participant fails to complete intake within 45-days from the Application date, the WF1 Application should be closed. See page 5.

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 a screenshot of the WF1 system interface. On the left is a navigation menu with categories: General (At-A-Glance, Contact, Ticker, Demographics, Work Preferences, MN Works Resume), Case Note (Add Case Note, Case Note Quick, Case Note Search), and Case (Program/New App, which is circled in red). The main area is split into two panels. The top panel, 'Program Summary', shows details for 'Elsa Arendelle' (Birth Date 12/21/1995) and an 'Add New Application' button. A callout box points to this button, stating: 'This panel provides a summary of all programs and related information found in WF1 for which a person has an application, eligibility determination, enrollment, and/or exit. Click **Add New Application** to continue. The **New Application** panel will appear.' The bottom panel, 'New Application', shows the same user details and a progress bar with three steps: '1. Application' (active), '2. Eligibility', and '3. Enrollment'. Below the progress bar are several fields: '*Program' (dropdown), '*Application Date' (calendar icon), 'Agency' (Ramsey County Workforce Solutions), 'COFFR' (Ramsey Cty Workforce Solutions - LWDA 15), '*Location' (dropdown, currently 'None Selected'), 'Service Model' (dropdown, currently 'None Selected'), 'Primary Staff' (dropdown, 'Select Location to populate this field'), 'Support Staff' (dropdown, 'Select Location to populate this field'), and 'Send Ticker' (checkbox). A callout box points to the 'Program' dropdown, stating: 'Program – Select the appropriate **Program**'. Another callout box points to the 'Application Date' field, stating: 'Application Date = the **Date** the participant completed the **Application** (this date must be within 180 days of the entry date)'. A third callout box points to the 'Location' dropdown, stating: 'Location – May default to your location, otherwise **select the appropriate Location**'. A fourth callout box points to the bottom of the form, stating: 'Primary Staff = The assigned **staff's name**. Click **Save and Exit Wizard** to save the Application **OR** Click **Continue to Eligibility** if intake has been completed'. At the bottom of the 'New Application' panel are three buttons: 'Continue to Eligibility', 'Save and Exit Wizard', and 'Cancel'.

CLOSE APPLICATION

Applications in 'Pending' status should be closed if the enrollment will no longer be completed for the participant, as indicated on page 4.

If the participant is being enrolled, go to page 6.

The screenshot shows the 'Person At-A-Glance' page for Elsa Arendelle. The left navigation menu has 'At-A-Glance' circled. The main content area shows personal information, contact details, and a table of applications. The application 'WIOA OSY Seq 1' is highlighted in yellow with a status of 'Pending'. A callout box points to this application with the text: 'The Application is currently 'Pending''.

Program	Status	Application Date	Enroll Date	Exit Date	Closed from App Date	Last Follow-up Date	COFFR
WIOA OSY Seq 1	Pending	06/01/2019					Ramsey Cty (15)

Click **Exit** on the left navigation menu and the following panel will appear.

The screenshot shows the 'Exit Summary' panel for Elsa Arendelle. The left navigation menu has 'Exit' circled. The main content area shows a 'Close Program Sequence' button. A callout box points to this button with the text: 'Click **Close Program Sequence** to close the Application'. Below this, another callout box points to a dropdown menu item: 'Hide WIOA Out-of-School Youth Seq 1 - Closed from Application'. A third callout box points to the 'Closure Date' field, which shows '07/10/2019'. The text 'The panel shown below will appear' is also present.

ELIGIBILITY

The **Eligibility** panel is completed in WF1 following the WF1 Application. In this example, all items shown below are required to determine if the participant is eligible for the **WIOA Out-of-School Youth** program and/or for reporting purposes. The required items may be different for WIOA In-School Youth or MN Youth.

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

Participation Hours

Exit

Follow-Up

Case Assignment

Service Model

WIOA Out-of-School Youth Eligibility

Elsa Arendelle Record ID 202013374

Birth Date 12/21/1995

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 06/01/2019

***Decision Date**

***SSN** 015-08-2018

***Birth Date** **Age** 23

***Gender**

***Citizen/Right to Work**

***SSI Recipient**

***SSDI Recipient**

***TANF/MFIP Recipient**

***SNAP Recipient**

***General Assistance Recipient**

***Refugee Assistance Recipient**

***Living in a High Poverty Area**

***Family Status**

***Eligible Family Size**

***Actual Family Size**

***Dependents Under 18 Years**

***Annual Family Income** \$

***Highest Level of Education**

***Pre-Enrollment Education Status**

English Reading Skills Grade Level

Math Skills Grade Level

***Basic Skills Deficient (Locally Defined)**

***Participating in a Registered Apprenticeship Program**

***Not Attend School for at Least the Most Recent Complete School Yr Calendar Qtr**

***Disability Status**

Decision Date = the **Date** the **Employment Counselor** determined the participant eligible for the program

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

Selective Service Registration is required for males 18 years old or older and will appear here, under Citizen/Right to Work, for male applicants

English Reading Skills Grade Level and **Math Skills Grade Level** are required also

ELIGIBILITY continued

The items shown below are also required for the **WIOA Out-of-School Youth** program and/or for reporting purposes. The required items may be different for WIOA In-School Youth or MN Youth.

*Limited English Proficiency	None Selected
*Homeless	None Selected
*Foster Child	None Selected
*5% Participant	None Selected
*Parenting/Pregnant Youth	None Selected
*Runaway Youth	None Selected
*Out of Home Placement	None Selected
*Recovering Chemically Dependent	None Selected
*Offender	None Selected
*Requires Additional Assistance	None Selected
*Individualized Education Plan	None Selected

Determine Results

Save and Exit Wizard Cancel

5% Participant - Refer to the **5% Enrollment Window Policy**

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

Determine Results	
Poverty Guideline Income Limit	\$11,670.00
100% LLSIL Income Limit	\$12,824.00
70% LLSIL Income Limit	\$8,976.80
Economically Disadvantaged	No
Basic Skills Deficient	Yes
Determination Results	Ineligible

Save and Exit Wizard Cancel

If **Ineligible** is appearing, the participant has been determined **Ineligible**.

Select **Cancel**, review the items selected and correct any items entered incorrectly, then Click **Determine Results** again

Determine Results	
Poverty Guideline Income Limit	\$15,730.00
100% LLSIL Income Limit	\$21,014.00
70% LLSIL Income Limit	\$14,709.80
Economically Disadvantaged	Yes
Basic Skills Deficient	Yes
Determination Results	Eligible

Save and Continue to Enrollment Save and Exit Wizard Cancel

Click **Save and Continue to Enrollment**, only if **Eligible** is appearing

ENROLLMENT

Shown below is a sampling of items required for **Enrollment** into the **WIOA Out-of-School Youth** program. The required items may be different for WIOA In-School Youth or MN Youth.

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

Participation Hours

Exit

Follow-Up

Case Assignment

Service Model

EDS

Add Document

Document Summary

DHS-IX

MAXIS

Incoming Status Update

Referral

Service

WIOA Out-of-School Youth Enrollment

Elsa Arendelle Record ID 202013374
Birth Date 12/21/1995

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

Program Seq 1
Agency: Location Ramsey County Workforce Solutions: North St. Paul
Entered by Laurie J Doheny **Last Updated by** Laurie J Doheny
Application Date 06/01/2019 **Decision Date** 06/01/2019

***Enrollment Date** 06/17/2019
***Primary Staff** Doheny, Laurie J
SSN 015-08-2018

***Last Name** Arendelle ***First Name** Elsa
***Address 1** 987 Icy Road
Address 2
***City** Frozen City ***State** MN ***Zip** 55101
***County** Ramsey ***Country** United States

Phone	Ext.	Phone Type	If other, please specify:	TTY	Video
(651) 555-6543		Primary		<input type="checkbox"/>	<input type="checkbox"/>
		None Selected		<input type="checkbox"/>	<input type="checkbox"/>
		None Selected		<input type="checkbox"/>	<input type="checkbox"/>
		None Selected		<input type="checkbox"/>	<input type="checkbox"/>

***Ethnicity - Hispanic or Latino** Person is Hispanic or Latino
***Race**
 American Indian or Alaska Native Asian
 Black or African American Did Not Self-Identify
 Hawaiian Native/Pacific Islander White
***Veteran Status** Not a Veteran
***Pell Grant Status** None Selected

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**

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Workforce Solutions, MIS Unit 10/2019

ENROLLMENT continued

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

1. Staff Assisted Assessment
2. Career Counseling – this activity remains open until program exit.

Support Service	*Referred from Wagner-Peyser	None Selected
Assessment	*Labor Force Status	None Selected
DHS Assessment	*Migrant Status	No
Reading/Math Test	*UI Benefit Status	None Selected
Form/Letter/Schedule	*Received WF Info Serv	None Selected
Appointment	*WF Profiling Reemp Serv	None Selected
Session	*Lack of Significant Work History	None Selected
NOITS	*Unemployed for the Last 27 Consecutive Weeks	None Selected
Outgoing Status Update	Previous Employer	
Veteran Forms	*Hourly Wage of Last Job	\$ <input type="text"/> <input type="checkbox"/> Undisclosed
Wage Detail Consent	Prev Occupation Title (O*NET)	<input type="text"/> - Clear O*NET code for new search. Search/Validate O*NET
History	*Wage Detail Consent Given	None Selected
Audit	Effective Date	<input type="text"/>
Access	Open Initial Activity	
Privacy Level	*Activity Type	Staff Assisted Assessment
	Activity Subtype	<input type="text"/>
	Estimated End Date	<input type="text"/>
	Estimated Hours	<input type="text"/>
	Estimated Cost	\$ <input type="text"/>
	Case Note	<input type="text"/>
	Spell Check	<input type="button" value="Spell Check"/>
	Enroll	<input type="button" value="Enroll"/>
	Enroll and Add Another Activity	<input type="button" value="Enroll and Add Another Activity"/>
	Save without Enrolling	<input type="button" value="Save without Enrolling"/>
	Cancel	<input type="button" value="Cancel"/>

Activity Type = Staff Assisted Assessment for the 1st activity

Estimated End Date – is recommended but is optional.
A Tickler will be created if a date within 90-days of the Activity Start Date is entered, allowing the enrollment to be deleted if the participant does not want to continue & if no Support Service funds have been provided – see page 11

Click Enroll and Add Another Activity to add the **Career Counseling** activity

ENROLLMENT continued

The second activity to open is **Career Counseling**. Every participant must have the following Activities opened initially:

1. **Staff Assisted Assessment**
2. **Career Counseling** – this activity remains open until program exit.

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

WIOA Out-of-School Youth Activity

Elsa Arendelle
Birth Date 12/21/1995

Record ID 202013374

Program Seq 1

Agency: Location Ramsey County Workforce Solutions: North St. Paul

Enrollment Date 06/17/2019

Entered by Laurie J Doheny

*Assign to Staff Doheny, Laurie (Current Primary)

*Activity Type Career Counseling

Next

Enrollment saved.

Activity Type = **Career Counseling** for the 2nd activity

Click **Next** to add the **Career Counseling** activity

WIOA Out-of-School Youth Activity

Elsa Arendelle
Birth Date 12/21/1995

Record ID 202013374

Program Seq 1

Agency: Location Ramsey County Workforce Solutions: North St. Paul

Enrollment Date 06/17/2019

Entered by Laurie J Doheny

Assign to Staff Doheny, Laurie (Current Primary)

Activity Type Career Counseling

Change Activity/Staff

Hide Open Activity

*Start Date 06/17/2019

Estimated End Date

Activity Subtype

Estimated Cost \$

Estimated Hours

User Defined Text 1

User Defined Text 2

User Defined Date

Show Comments

Show Case Note

Show Close Activity

Save Save and Open New Activity Cancel

This panel will appear after selecting **Next**

Start Date = the same date as the **Enrollment Date**

Click **Save**
OR
Click **Save and Open New Activity** to open another activity

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 your Supervisor's approval.

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

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

Laurie.Doheny@ramseycounty.us and Alan.Wanless@ramseycounty.us

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

Once the Supervisor has approved the deletion, MIS Staff will delete the Program Sequence, enter a Case Note regarding the deletion and send notification to staff.

In the example below, the **Program Summary** panel indicates that the participant has been enrolled for 89 days and would be eligible for program deletion if Support Services were not provided.

The screenshot displays a software interface with a sidebar on the left containing navigation options: General, Case Note, and Cases. The 'Program Summary' panel is highlighted in yellow. It shows the following information:

- Program Summary**
- Elsa Arendelle** (Record ID 202013374)
- Birth Date 12/21/1995**
- Add New Application** button
- Hide WIOA Out-of-School Youth Seq 1 - Enrolled** dropdown
- Staff** table:

Staff	Agency: Location
Laurie J Doheny (Primary 06/01/2019-present)	WF Solutions: North St. Paul
- Open Activities** table:

Open Activities	Start Date	Estimated End Date	Days in Activity
Staff Assist Assess	06/17/2019	09/01/2019	89
Career Counseling	06/17/2019		89