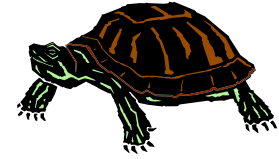


Workforce One

Electronic Document Storage (EDS) System
Adult/Dislocated Worker/Youth
October 2019



Participant's program documents must be uploaded to WF1's EDS system by the assigned Employment Counselor, program Supervisor, Case Aide or Data Specialist.

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Add Document

Documents must be saved to your computer prior to uploading to WF1's EDS.

It is recommended to save the document with the participant's name and brief description for ease in locating correct document. Document Name example: **Oz, Wizard - Credential**

Refer to pages 9-14 for the list of Document Types and the associated Document Names.

Click the **Add Document** link from the left navigation menu and the panel shown below will appear.

General

At-A-Glance
Contact
Tickler
Demographics
Work Preference
MN Works Resur

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 Add

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

*Program Seq: Adult Seq 2 (Enrolled) ▼

*EDS Document Type: None Selected ▼

*Select a File: Browse...

Next Cancel

Program Seq: Select the correct Program
This example is **Adult**

EDS Document Type*: Select appropriate item

*See pages 9-14 for the EDS Document Types

Select a File: Click **Browse**, locate correct document that was saved previously

Click Next

Add Document continued:

All items marked with an asterisk are required when adding documents.
The items highlighted below are optional, but should be used when applicable.

Click **Upload** once data has been entered.

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

Support Service

Assessment

DHS Assessment
Reading/Math Test

Form/Letter/Schedule

Appointment
Session
NOITS
Outgoing Status Update
Veteran Forms
Wage Detail Consent

History

Audit

Person At-A-Glance

Wizard O Oz
Birth Date 03/01/1974
Record ID 10000965

Document Add

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

*Program Seq Adult Seq 2 (Enrolled)
*EDS Document Type Adult - Education and Training
Selected File Oz, Wizard - Credential.docx

Change Document Type or File

*Agency Ramsey County Workforce Solutions
*Staff Associated Doheny, Laurie J
*Document Name None Selected
User Defined Document Name
Folder Training
*Privacy Level All Staff in Only Servicing Agency
Send Tickler To None Selected
Can Share with Person Yes
Received Date
Document Date
Signed Date
Expiration Date
Reason for Collecting None Selected

School
Clear School code for new search.
Search/Validate School

User Defined Date 1
User Defined Date 2
User Defined Tag 1
User Defined Tag 2

Show Comments
Hide Case Note

Category Training
Select/Deselect

Note
This case note entered in the Add Document panel when uploading a document. This Case Note will be auto-added to the Case Note section of WF1.
Spell Check

Upload Cancel

Selected File: Confirm that the correct file is listed before proceeding

Staff Associated: Select your name

Document Name: Select the appropriate item

Note: this may auto-populate depending on the Document Type selected, but should be changed if incorrect

User Defined Document Name: Enter a more detailed name if the pre-defined Document Name isn't adequate

Folder: Select appropriate item

Note: This may auto-fill depending on the Document Name that is selected, but should be changed if incorrect

Privacy Level* = Select **All Staff in Only Servicing Agency**

*This item will default to Private when selecting Medical as the Document Type

Received Date, Document Date, Signed Date & Expiration Date = Entering the appropriate date for any of these will allow a search to be completed by the date entered

Reason for Collecting: Select appropriate item

Click **Upload**

Document Summary & View

The **Document Summary** panel lists the documents that have been uploaded to each program sequence.

Click the **Document Summary** link from the left navigation menu and the panel shown below will appear allowing you to view the documents.

The screenshot shows the EDS Document Summary interface. On the left is a navigation menu with 'Document Summary' highlighted. The main area displays a table of documents under the heading 'Hide Adult Seq 2 - Enrolled'. The table has columns for Document Name, EDS Document Type, Uploaded Date, Document Date, Received Date, Format, Cmt Added, and Action. Two documents are listed: 'Grades, Transcript' and 'Credential'. The 'Credential' document is selected, and an arrow points from its 'Credential' name to a file download dialog box at the bottom. The dialog box asks 'Do you want to open or save 10000968_Credential_20191022_1226.docx (11.5 KB) from mnworkforceone.com?' and has 'Open', 'Save', and 'Cancel' buttons. A callout box points to the 'Open' button with the text 'Click Open to view the document.'

Document Name: User Defined Document Name	EDS Document Type	Uploaded Date	Document Date: Received Date	Format	Cmt Added	Action
Grades, Transcript This info entered in User Defined Document Name	Adult - Education and Training	10/16/2019 04:39:14 PM			No	Tags and Comments Copy
Credential	Adult - Education and Training	10/15/2019 10:01:34 AM	10/13/2019 10/15/2019		No	Tags and Comments Copy Move Delete

Do you want to open or save **10000968_Credential_20191022_1226.docx** (11.5 KB) from **mnworkforceone.com**?

Open Save Cancel

Click Open to view the document.

Document Name = the name selected, or auto-entered, when adding the document.
Click the Document Name link to view the document.

User Defined Document Name = the name entered when adding the document

EDS Document Type = the name selected when adding the document

Document Date & Received Date = the dates entered when adding the document

Action: click an item to complete the action

Edit Document - Tags and Comments

Users with the appropriate privileges are able to **Edit** document tags and/or add comments to documents.

Click the **Document Summary** link from the left navigation menu and the panel shown below will appear.

The screenshot shows the EDS system interface. On the left is a navigation menu with the following items: EDS, Add Document, **Document Summary** (circled), DHS-1A, MAXIS, Incoming Status Update, Referral, Service, Support Service, Assessment, DHS Assessment, Reading/Math Test, and Form/Letter/Schedule. The main area displays a table of documents under the heading 'Hide Adult Seq 2 - Enrolled'. The table has columns for Document Name, EDS Document Type, Uploaded Date, Document Date, Format, Cmt Added, and Action. Two documents are listed: 'Grades, Transcript' and 'Credential'. The 'Credential' document is selected, and its 'Action' column contains links for 'Tags and Comments Copy', 'Move', and 'Delete'. A callout box points to these links with the text: 'Action: Click Tags and Comments to access the Document Tags and Comments panel' and 'Click Edit Tags to update, add or change items in the document'. Below the table is the 'Document Tags and Comments' panel for the 'Credential' document. It shows details for 'Wizard O Oz' (Birth Date 03/01/1974) and lists various document attributes such as Program Seq, EDS Document Type, Agency, Staff Associated, Document Name, User Defined Document Name, Folder, Privacy Level, Can Share with Person, Received Date, Document Date, Signed Date, Expiration Date, Reason for Collecting, School, User Defined Date 1, User Defined Date 2, User Defined Tag 1, User Defined Tag 2, and Uploaded by (Laurie J Doheny). An 'Edit Tags' button is located at the bottom of this panel.

Document Name: User Defined Document Name	EDS Document Type	Uploaded Date	Document Date: Received Date	Format	Cmt Added	Action
Grades, Transcript This info entered in User Defined Document Name	Adult - Education and Training	10/16/2019 04:39:14 PM			No	Tags and Comments Copy
Credential	Adult - Education and Training	10/15/2019 10:01:34 AM	10/13/2019 10/15/2019		No	Tags and Comments Copy Move Delete

Action: Click Tags and Comments to access the Document Tags and Comments panel

Click Edit Tags to update, add or change items in the document

Document Tags and Comments

Wizard O Oz
Birth Date 03/01/1974

Program Seq: Adult Seq 2 (Enrolled)

EDS Document Type: Adult - Education and Training

Agency: Ramsey County Workforce Solutions

Staff Associated: Laurie J Doheny

Document Name: Grades or Transcript

User Defined Document Name: This info entered in User Defined Document Name

Folder: Training

Privacy Level: All Staff in Only Servicing Agency

Can Share with Person: Yes

Received Date:

Document Date:

Signed Date:

Expiration Date:

Reason for Collecting: Verification of Progress Toward Goals

School:

User Defined Date 1:

User Defined Date 2:

User Defined Tag 1:

User Defined Tag 2:

Uploaded by: Laurie J Doheny

Copy Document

Users with the appropriate privileges may **Copy** documents from one program sequence to another program sequence within the same person record,

Click the **Document Summary** link from the left navigation menu and the panel shown below will appear.

EDS						
Add Document						
Document Summary						
DHS-IX						
MAXIS						
Incoming Status Update						
Referral						
Service						
▼ Hide DW Seq 1 - Enrolled						
Document Name: User Defined Document Name	EDS Document Type	Uploaded Date	Document Date: Received Date	Format	Cmt Added	Action
Letter Address Change	DW - Correspondence	10/22/2019 12:47:10 PM	10/01/2019		No	Tags and Comments Copy Move Delete

Action: Select **Copy** to access the **Document Copy** panel

Document Copy

Elsa Arendelle
Birth Date 12/21/1995

Source Person Name: Elsa Arendelle

Source Program Seq: DW Seq 1

Source Document Name: Letter Address Change

*Target Program Seq: Elsa Arendelle, ACP Seq 1 (Enrolled)

*EDS Document Type: None Selected

*Document Name: Select Document Type to populate

Folder: None Selected

Copy Cancel

All items marked with an asterisk are required when copying documents.

Target Program Seq*: Select the correct name & program seq.

This document is being copied from **DW Seq 1** to **ACP Seq 1**

Click **Copy** to complete the copy process

Move Document

Users with the appropriate privileges may **Move** documents from one program sequence to another program sequence within the same person record. Moving documents is usually only completed when a document was uploaded to an incorrect program sequence in error.

For example, a document may move from **DW Seq 1** to **ACP Seq 1**.

Most Users can only move documents within seven days of when added to WF1's EDS system.

NOTE: Users are not allowed to move documents that are attached to payments or authorizations.

Click the **Document Summary** link from the left navigation menu and the panel shown below will appear.

EDS						
Add Document						
Document Summary						
DHS-IX						
MAXIS						
Incoming Status Update						
Referral						
Service						
▼ Hide DW Seq 1 - Enrolled						
Document Name: User Defined Document Name	EDS Document Type	Uploaded Date	Document Date: Received Date	Format	Cmt Added	Action
Letter Address Change	DW - Correspondence	10/22/2019 12:47:10 PM	10/01/2019		No	Tags and Comments Copy Move Delete

Action: Select **Move** to access the **Document Move** panel

Document Move

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

Source Person Name: Elsa Arendelle
Source Program Seq: DW Seq 1
Source Document Name: Letter Address Change

*Target Program Seq: Elsa Arendelle, ACP Seq 1 (Enrolled) ▼

*EDS Document Type: None Selected ▼

*Document Name: Select Document Type to populate ▼

Folder: None Selected ▼

*Reason for Move:

Spell Check

All items marked with an asterisk are required when moving documents.

Target Program Seq*: Select the correct name & program seq.

This document is being moved from **DW Seq 1** to **ACP Seq 1**

Reason for Move: Enter the reason the document is moving

Click **Move** to complete the move process

Manage Case: Move/Copy Document

Users with the appropriate privileges may access the **EDS Document Move/Copy** page by navigating to **Manage Case** in the top navigation menu and selecting "EDS Document Move/Copy".

This **Move** differs from the **Move** on page 6, as this only allows a document to move within the same program.

NOTE: Users are not allowed to move documents that are attached to payments or authorizations.

Manage Case: Select EDS Document Move/Copy

Source Record ID = the WF1 ID of the person from which the document is being moved/copied

Target Record ID = the WF1 ID of the person to which the document is being moved/copied. This could be the same person or a different person.

Click **Next**

Source Program Seq = the Program the document is moving from

Target Program Seq = the Program the document is moving to

Click **Next**

The document is moving from one participant's WIOA ISY Seq to another participant's WIOA ISY sequence because the document was uploaded to the wrong record

Action: Select Copy or Move next to the correct document to access the next panel which requires a **Reason** for the copy or move.

EDS Document Copy or Move

*Source Record ID: 100002723
*Target Record ID: 100002720

Next

EDS Document Copy or Move

Source Record ID: Sunshine Aldeigh, Record ID 100002723
*Source Program Seq: WIOA ISY Seq 1 (Enrolled)
Target Record ID: Clownin A Around, Record ID 100002720
*Target Program Seq: WIOA ISY Seq 2 (Pending)

Next Change Record ID

EDS Document Copy or Move

Source Record ID: Sunshine Aldeigh, Record ID 100002723
Source Program Seq: WIOA ISY Seq 1 (Enrolled)
Target Record ID: Clownin A Around, Record ID 100002720
Target Program Seq: WIOA ISY Seq 2 (Pending)

Change Record ID

Document Name:	EDS Document Type	Folder	Uploaded Date	Action
User Defined Document Name				
Letter	WIOA ISY - Correspondence	Communication and Notes	10/22/2019 01:28:54 PM	Copy Move

NOTE:


Documents may only be moved to the same program; you are not able to move to a different program.

Example: You cannot move a document from a person's MFIP program sequence to a person's Adult program sequence.

Delete Document

Users with the appropriate privileges may delete documents from EDS.

Click the **Document Summary** link from the left navigation menu and the panel shown below will appear.

EDS	Hide DW Seq 1 - Enrolled						
Add Document	Document Name:	EDS Document Type	Uploaded Date	Document Date: Received Date	Format	Cmt Added	Action
Document Summary	User Defined Document Name						
DHS-IX	Letter	DW - Correspondence	10/22/2019 12:47:10 PM	10/01/2019		No	Tags and Comments Copy Move Delete
MAXIS	Address Change						
Incoming Status Update							
Referral							
Service							

Action: Select **Delete** next to the correct document to access the **Document Delete** panel

Deletion Reason: Select appropriate item

Deletion Reasons are:

- Duplicate Document
- Scanning Error
- Wrong Person
- Other

Additional info must be entered in the textbox if **Other** is selected as the **Deletion Reason**.

Click **Yes** to complete the deletion of the selected document

Document Delete

This action will permanently remove this document and cannot be undone. If you need to preserve this document to use elsewhere, then you may need to save the document before completing this action. Are you sure you want to permanently delete this document?

*Deletion Reason

If Other, what is the reason?

Spell Check

Yes No

Document Types and Document Names – Adult/DW

The following is a crosswalk of the current documents used for **Adult and/or DW** in Ramsey County. Any other documents should be uploaded under the most appropriate Document Type and Folder.

EDS Document Type	EDS Folder	User Defined Document Name (Ramsey County Documents)
Assessment	Training	Assessment for Classroom Training
Assessments	Assessments	Assessment inventories
Authorizations, Purchase Orders, Payments	Support Services and Financial	Authorizations
Identity	Application/Eligibility	Birth date verification
Financial - Bills, Expenses	Support Services and Financial	Claim forms
Financial – Assets, Income	Career Services	CLIMB Supplemental data
Correspondence	Communication and Notes	Correspondence- emails, texts, letters
Education and Training	Training	Course schedules
Employment	Career Services	Cover letters
Consent, Release of Information	Career Services	Data Practices
Program-Specific	Application/Eligibility	DW/Adult Application
Education and Training	Training	ETPL printout
Authorizations, Purchase Orders, Payments	Support Services and Financial	Gas card/bus pass slips
Education and Training	Training	Grades/Certificates
Employment	IEP/ISS	IEP/Plan
Financial - Other	Support Services and Financial	Income worksheet
Employment	Application/Eligibility	Layoff letter (participant's name on company letterhead)

Document Types and Document Names – Adult/DW continued:

The following is a crosswalk of the current documents used for **Adult and/or DW** in Ramsey County. Any other documents should be uploaded under the most appropriate Document Type and Folder.

EDS Document Type	EDS Folder	User Defined Document Name (Ramsey County Documents)
Financial – Bills, Expenses	Support Services and Financial	Ledger
Program - Specific	Application/Eligibility	Long term unemployed verification (if needed)
Financial – Assets, Income	Application/Eligibility	Low income verification (Adult only)
Identity	Application/Eligibility	Photo ID
Employment	Exit and follow up	Placement/job information
Consent, Release of Information	Career Services	Positively MN Wage Detail
Employment	Career Services	Resume
Assessments	Assessments	SelectABLE, TABE or CASAS
Selective Service	Application/Eligibility	Selective Service/Status letter (if needed)
Social Security	Application/Eligibility	Social Security Card or W2
Education and Training	Training	Training contract
Education and Training	Training	Training proposal
Financial - Unemployment Insurance (UI)	Application/Eligibility	UI Determination and Issue Summary Letter
Financial - Unemployment Insurance (UI)	Application/Eligibility	UI Payment Information
Program - Specific	Application/Eligibility	Unlikely to return sheet (DW only)
Veterans	Application/Eligibility	Veteran Status – DD214 (if needed)
Financial Authorizations, Purchase Orders, Payments	Application/Eligibility	W9 (if needed)

Document Types and Document Names – Adult/DW continued:

The following is a crosswalk of the current documents used for **Adult and/or DW** in Ramsey County. Any other documents should be uploaded under the most appropriate Document Type and Folder.

EDS Document Type	EDS Folder	User Defined Document Name (Ramsey County Documents)
Program - Specific	Career Services	WF1 activities
Program - Specific	Application/Eligibility	WF1 Enrollment Form
Identity	Application/Eligibility	Work authorization documentation for individuals with Right to Work status

Document Types and Document Names – Youth

The following is a crosswalk of the current documents used for **WIOA Youth** in Ramsey County. Any other documents should be uploaded under the most appropriate Document Type and Folder.

EDS Document Type	EDS Folder	User Defined Document Name (Ramsey County Documents)
Assessments	Assessments	Annual Assessment
Education and Training OR Employment	Exit and Follow-Up	Any docs collected in Follow-Up
Employment	Career Services	Background Check/Criminal History Record
Financial – Assets, Income	Support Services and Financial	Bank Statement
Appeals and Complaints	Career Services	Complaint Procedures
Consent, Release of Information	Career Services	Consent to Release Wage Detail
Education and Training	Training	Course/School Schedule
Employment	Career Services	Cover Letters
Consent, Release of Information	Career Services	Data Privacy Form
Education and Training	Training	Diplomas/Certificates
Financial – Bills, Expenses	Support Services and Financial	Direct Deposit Information (cancelled check)
Correspondence	Communication and Notes	Emails
Education and Training	Training	FASFA Report
Education and Training	Training	Individualized Education Plan
Employment	IEP/ISS	Individualized Service Strategy
Education and Training	Training	ITA Proposal
Correspondence	Communication and Notes	Letters

Document Types and Document Names – Youth continued:

The following is a crosswalk of the current documents used for **WIOA Youth** in Ramsey County. Any other documents should be uploaded under the most appropriate Document Type and Folder.

EDS Document Type	EDS Folder	User Defined Document Name (Ramsey County Documents)
Medical	Career Services	Medical Diagnosis * PRIVATE
Assessments	Assessments	Other Career Assessments/Inventories
Consent, Release of Information	Career Services	Releases of Information
Employment	Career Services	Resume
Education and Training	Training	Scholarship Information
Selective Service	Application/Eligibility	Selective Service Registration Proof
Social Security	Application/Eligibility	Social Security Number (Card)
Financial – Bills, Expenses	Support Services and Financial	Support Service Proofs (bills, receipts, etc.)
Financial – Other	Support Services and Financial	Support Service/Incentive Sheets
Assessments	Assessments	TABE
Correspondence	Communication and Notes	Texts
Employment	Career Services	Time Cards
Education and Training	Training	Transcript/Proof of Grades
Program-Specific	Application/Eligibility	ULEAD Application
Identity	Application/Eligibility	Verification of DOB (ID)
Medical	Career Services	Vocational Rehab Letter
Employment	Career Services	WEX Learning Plan

Document Types and Document Names – Youth continued:

The following is a crosswalk of the current documents used for **WIOA Youth** in Ramsey County. Any other documents should be uploaded under the most appropriate Document Type and Folder.

EDS Document Type	EDS Folder	User Defined Document Name (Ramsey County Documents)
Employment	Career Services	Work Experience Agreement
Employment	Career Services	Worksite Agreement