

Workforce One

Plan User Guide
MN & WIOA Youth
October 2019



A **Plan** is used for identifying strengths and setting goals and activities for a participant

A Plan must include the Activities and Program Elements that the participant has chosen

Refer to the following WFS policies/guidance for additional information:

- **Enrollment**
- **Client Training**
- **Case File Monitoring**
- **Case Management**

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ADD PLAN

To create a **Plan**:

Click on the **Plan** link found on the left navigation panel.

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**

Plan Summary

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

▼ Hide WIOA OSY Seq 1 - Enrolled

No plans found.

Add Plan

▼ Show DW Seq 1 - Enrolled

▼ Show ACP Seq 1 - Enrolled

Click **Add Plan**

The panel shown below will appear

WIOA Out-of-School Youth Employment Plan

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

Program Seq 1

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

Entered by Laurie J Doheny

Staff Assigned Laurie J Doheny

*Plan Mode None Selected

Save and Continue Cancel

Plan Mode – **Select appropriate Mode** – Options are:

- **Online** – allows specific sections to be added and retained in WF1
- **Paper** – indicates that a **Paper Plan** is on file

Click **Save and Continue**

ADD PLAN continued:

The items marked with an asterisk* are required when creating a **Plan**.
The example below is for a **Paper Plan**.

WIOA Out-of-School Youth Employment Plan

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

Program Seq 1
Agency: Location Ramsey County Workforce Solutions: North St. Paul
Entered by Laurie J Doheny
Staff Assigned Laurie J Doheny




Plan Mode Paper

▼ Hide Case Note

When creating a Plan, use this area to write a description of the plan. This Case Note will be auto-added to the Case Note section of WF1.

Spell Check

Plan Status Pending

***Start Date** 06/17/2019 
Review Date 06/16/2020 
 ***Confirmation Date** 

Save and Activate Save as Pending Delete Pending Plan

Case Notes entered here will appear in the Case Note panel (as shown below)

Start Date – Enter the appropriate date
 The **Start Date** will auto enter the date you are adding the Plan. Adjust the date if the **Plan Start Date** is different.

Review Date – Enter the date the Plan needs to be reviewed/updated.
 Plans must be updated at least once every 365 days. A Tickler will be generated 30-days prior to the Review Date and sent to the Primary Staff.

Confirmation Date – Enter the date the Plan was signed, agreed upon, and/or confirmed by the staff and the participant

Click **Save and Activate** or **Save as Pending** if the Plan is incomplete

Case Note View

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

Event Date 06/17/2019
Note Viewable By All Staff in Servicing Agency
Program WIOA Out-of-School Youth
Agency Ramsey County Workforce Solutions
Staff Assigned Doheny, Laurie J
Category Employment/Service Plan
Contact Method
Contact Type
Status Open
Mass Case Note No
Subject When creating a Plan, use this area to write a description of the plan. Th

Note
 When creating a Plan, use this area to write a description of the plan. This Case Note will be auto-added to the Case Note section of WF1.

This is an example of how the **Case Note** will appear in the Case Note panel

ADD PLAN continued:

The items marked with an asterisk* are required when creating a **Plan**.
The example below is for an **Online Plan**.

WIOA Out-of-School Youth Employment Plan

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

Program Seq 1
Agency: Location Ramsey County Workforce Solutions: North St. Paul
Entered by Laurie J Doheny
Staff Assigned Laurie J Doheny

Plan Mode Online
*Full Legal Name

Hide Goals

Spell Check

Hide Plan Sections

No plan sections added.

*Add Section Add Section

Hide Case Note

When creating a Plan, use this area to write a description of the plan. This Case Note will be auto-added to the Case Note section of WF1.

Spell Check

Plan Status Pending

*Start Date 06/17/2019

Review Date 06/16/2020

*Confirmation Date

Save and Activate Save as Pending View/Print Delete Pending Plan

Full Legal Name must be entered

Goals – Enter the participant's goals

Plan Sections – Add Section – Select the appropriated section and then Click **Add Section**

Continue entering the pertinent information for each section added

Case Notes entered here will appear in the Case Note panel (as shown below)

Start Date – Enter the appropriate date

The **Start Date** will auto enter the date you are adding the Plan. Adjust the date if the **Plan Start Date** is different.

Review Date – Enter the date the Plan needs to be reviewed/updated.

Plans must be updated at least once every 365 days. A Tickler will be generated 30-days prior to the Review Date and sent to the Primary Staff.

Confirmation Date – Enter the date the Plan was signed, agreed upon, and/or confirmed by the staff and the participant

Click **Save and Activate** or **Save as Pending** if the Plan is incomplete

PENDING PLAN

Plans saved as Pending must be Activated once complete.

Plan Summary

Elsa Arendelle
Birth Date 12/21/1995

Record ID 202013374

Hide WIOA OSY Seq 1 - Enrolled

Plan Type: Mode	Plan Status	Start Date: End Date	Staff: Agency	Action
Employment Plan Paper	Pending	06/17/2019	Laurie J Doheny WF Solutions	Edit Delete

Click **Edit** to complete the **Plan**
The panel shown below will appear

Click **Delete** to remove a **Pending Plan**

WIOA Out-of-School Youth Employment Plan

Elsa Arendelle
Birth Date 12/21/1995

Record ID 202013374

Program Seq 1

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

Entered by Laurie J Doheny Last Updated by Laurie J Doheny

Staff Assigned Laurie J Doheny

Plan Mode Paper

Hide Case Note

When creating a Plan, use this area to write a description of the plan. This Case Note will be auto-added to the Case Note section of WF1.

Spell Check

Plan Status Active

*Start Date 06/17/2019

Review Date 06/16/2020

*Confirmation Date 06/17/2019

Save and Activate Save as Pending Cancel Delete Pending Plan

Enter any remaining required items, such as the **Confirmation Date**

Confirmation Date – Enter the date the Plan was signed, agreed upon, and/or confirmed by the staff and the participant

Click **Save and Activate** – the **Plan** is now Active

Plan Summary

Elsa Arendelle
Birth Date 12/21/1995

Hide WIOA OSY Seq 1 - Enrolled

Plan Type: Mode	Plan Status	Start Date: End Date	Staff: Agency
Employment Plan Paper	Active	06/17/2019	Laurie J Doheny WF Solutions

UPDATING/EDITING A PLAN

A **Plan** must be Updated/Edited when:

- An obstacle or barrier has been overcome
- Goals or Objectives are achieved
- Living Conditions or personal life changes occur, e.g. the person moves, becomes responsible for a family member, falls ill, or if the person changes their name legally

Plan Summary

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

▼ Hide WIOA OSY Seq 1 - Enrolled

Plan Type: Mode	Plan Status	Start Date: End Date	Staff: Agency	Action
Employment Plan Online	Active	10/01/2019	Laurie J Doheny WF Solutions	Copy Achievements
Employment Plan Paper	Inactive	07/10/2019 10/01/2019	Laurie J Doheny WF Solutions	

Add Plan All Goals

FOR **PAPER** PLANS:
 Click **Add Plan** and complete the steps on pages 1 and 2

FOR EXISTING **ONLINE** PLANS:
 Click **Copy** and the panel shown will appear

WIOA Out-of-School Youth Employment Plan

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

Program Seq: 1
 Agency: Location: Ramsey County Workforce Solutions: North St. Paul
 Entered by: Laurie J Doheny
 Staff Assigned: Laurie J Doheny

Plan Mode: Online
 *Full Legal Name: Elsa of Arendelle

▼ Show Goals

▼ Hide Plan Sections

Plan Section	Review	Include in Printed Plan	Action
Assessment	Incomplete	Yes	Edit Delete

*Add Section: None Selected Add Section

▼ Show Case Note

Plan Status: Pending

*Start Date:
 Review Date:
 *Confirmation Date:

Save and Activate Save as Pending View/Print Delete Pending Plan

The Plan panel will appear allowing the info to be changed

Click **Edit** to update the Plan sections

Once items have been updated, **enter** the **Start Date, Review Date & Confirmation Date**

Click **Save and Activate**.