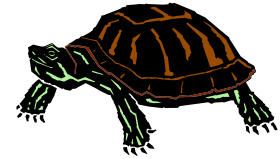


# Workforce One

## MN Subsidized and Transitional Employment Demonstration (MSTED)



MFIP participants that meet the program eligibility requirements may be referred to the MSTED program. Admission to the program will be decided through a lottery and those selected will be assigned randomly. The MSTED staff will notify the MFIP Employment Counselor of assigned MSTED agency and staff name after random selection is completed.

The following activities with sub types will be used for MSTED:

- Local Flag (MSTED)
- Job Skills Training Directly Related to Employment (MSTED)
- Job Search (MSTED)
- Employed Full-Time (100)
- Employed Full-Time (50)
- Employed Full-Time (0)
- Employed Part-Time (100)
- Employed Part-Time (50)
- Employed Part-Time (0)
- Paid Work Experience (MSTED)

This training guide indicates the WF1 process that the MFIP Employment Counselor and the MSTED Staff will follow.

Searching for a Person	Page 1
Person at a Glance	Page 2
Activity Summary	Page 3
MFIP Employment Counselors	Pages 4 – 8
MSTED Staff	Pages 9 -17
Re-Referrals to MSTED	Page 18
HIPAA Compliance	Page 19

# SEARCHING FOR A PERSON

Once logged into WF1, your **Dashboard** will appear. All participants assigned to you will appear under **Current Caseload**. You may also search for the participant.

**WORKFORCE ONE**

Log Out  
E & T: User: WF Solutions  
Switch Profile Change Password

Home **Search** My Tasks Recent Work Manage Case Manage Program Reports References Resources Help

**Dashboard**

**My Info**

12 Tickler(s) past due  
No Ticklers due today

No Appointments today

▼ Hide Current Caseload

Name ▼	Record ID	Program/Status	Latest Open Activity/Days Open	Last Case Note
Aldeigh, Sunshine B	100000252	Adult Enrolled	No Open Activity	08/01/2014 Employment/Service
Crow, Scare A	100000958	Adult Enrolled	Classroom Training Opened 145 days	08/20/2014 Appointment by you
Gale, Dorothy D	100000956	Minnesota Youth Enrolled	Objective Assessment Opened 145 days	08/14/2014 Support Service by v
Referral, Mary	100001419	MFIP Enrolled	No Open Activity	10/01/2014 Information and Ref

Look for the participant's name under **Current Caseload**.

Click on the name to enter the record.

Otherwise, you may click **Search**, and then **Person**.

**Person Search**

▼ Hide Search Criteria

Last Name

First Name

SSN

Record ID

MAXIS Case

MAXIS PMI

E-mail

▼ Hide Search Results

Name ▼	SSN	Record ID	MAXIS Case	MAXIS PMI
Referral, Mary	7170	100001419	10617170	617170

Search by the participant's Last & First name.

Note: If the exact spelling is unknown, the Last Name and First Name fields allow a single wildcard search by using an asterisk (\*). Searching a Last Name with John\* will return all customers with a last name that begins with John (e.g. John, Johnson, etc).

The participant's MAXIS case number may be entered as a search criteria without other information.

Click **Run Search** after entering search criteria.

When person is found, click on the appropriate person's name.

**NOTE: You will never use the Add New Person button.**

# PERSON AT-A-GLANCE

This page provides an overview of a person's entire WF1 record, allowing users to quickly view contact information and basic program data on one page.

Highlighted below are the tabs that will be used for the MSTED program.

General

At-A-Glance

Contact

Tickler

MN Works Resume

Demographics

Cases

Program/New App

Eligibility/Enrollment

Activity

Credential

TAA

Plan

WIA YY Goals

MYP Performance

Participation Hours

Exit

Follow-Up

Case Assignment

Service Model

DHS-IX

MAXIS

Incoming Status Update

Referral

Case Note

Add Case Note

Case Note Quick

Case Note Search

Service

Support Service

Person At-A-Glance

Mary Referral

Record ID 100001419  
MAXIS Case 10617170

Name and Mailing Address

Mary Referral  
1234 Mary Street  
Minneapolis MN 55409

Phone

Ext.

Phone Type

TTY

Video

651-555-1255

Home

No

No

Birth Date

06/22/1980

E-mail

Record ID

100001419

Last 4 SSN

7170

MAXIS Case

10617170

MAXIS PMI

617170

Program

Status

Application Date

Enroll Date

Exit Date

Closed from App Date

DW

Eligible, not enrolled

09/17/2014

MFIP

Enrolled

06/17/2014

06/17/2014

Person Search Results

**Activity** – to add (open) and end (close) activities.

**Case Assignment** – to add and end staff assignments.

**Service Model** – to add and end MSTED service model.

**Add Case Note** – to add case notes.

**Support Service** – to add support services.

# ACTIVITY – Summary

This page provides an overview of open and closed activities for each program sequence in the person's record.

**MFIP Employment Counselors** continue to page 4 to add activities.

**MSTED staff** continue to page 9 to add activities.

**General**

- At-A-Glance
- Contact
- MN Works Resume
- Demographics

**Cases**

- Program/New App
- Eligibility/Enrollment

**Activity**

- Exit
- Case Assignment

**Case Note**

- Add Case Note
- Case Note Quick
- Case Note Search

**History**

- Audit

**Activity Summary**

**Mary Referral**

▼ Hide **MFIP Seq 1 - Enrolled**

**Enrollment Date:** 06/17/2014 **Exit Date:**

Activity: Subtype	Funding Stream	Start Date/End Date	Staff: Agency	Action
Job Search	MFIP Statewide	07/01/2014 Open	Bruce S Casselton WF Solutions	Edit Copy
Local Flag	MFIP Statewide	06/17/2014 Open	Pang Yang WF Solutions	Edit Copy
Assessment	MFIP Statewide	06/17/2014 Open	Pang Yang WF Solutions	Edit Copy

[Add MFIP Activity](#)

The Activity Summary page allows activities to be added, edited and copied, depending on your privileges.

Click **Add MFIP Activity** to add an activity.

NOTE:

The **Copy** link may be used to replicate an existing activity. The items copied to the new activity are:

- Activity Type
- Activity Sub Type
- Employer Info section

NOTE: the Funding Stream does NOT copy to the new activity.

## ACTIVITY – Add (MFIP Employment Counselor)

The **MFIP Employment Counselor** will open the Local Flag (MSTED) activity with the MSTED Funding Stream, as indicated below, for **ALL** participants referred to MSTED. A case note should be entered at the Add Case Note tab – see page 7.

The screenshot shows the 'MFIP Activity' form. On the left is a sidebar with tabs: General, Cases, and Activity. The 'General' tab is active, showing fields for 'Program Seq' (1), 'Agency: Location', 'Entered by' (Laurie J Doheny), '\*Assign to Staff' (Yang, Pang (Current Primary)), and '\*Activity Type' (Local Flag). A yellow banner at the top right displays 'Record ID 100001419' and 'MAXIS Case 10617170'. A callout box on the right contains instructions: 'Assign to Staff – the **Current Primary** staff's name will appear.', 'Activity Type - select **Local Flag** from the drop down box.', and 'Click the **Next** button.' Arrows point from these instructions to the corresponding fields in the form.

**General** MFIP Activity

At-A-Glance  
Contact  
MN Works Resume  
Demographics

**Cases**  
Program/New App  
Eligibility/Enrollment

**Activity**

Next Cancel

Record ID 100001419  
MAXIS Case 10617170

Program Seq 1  
Agency: Location  
Entered by Laurie J Doheny  
\*Assign to Staff Yang, Pang (Current Primary)  
\*Activity Type Local Flag

Assign to Staff – the **Current Primary** staff's name will appear.  
Activity Type - select **Local Flag** from the drop down box.  
Click the **Next** button.

Enter the following information for the **Local Flag** activity.

The screenshot shows the activity details form. Fields include '\*Start Date' (11/03/2014), 'Estimated End Date', '\*Funding Stream' (MSTED), 'Activity Sub Type' (MSTED), 'Estimated Cost', 'Estimated Hours', 'User Defined Text 1', 'User Defined Text 2', and 'User Defined Date'. A callout box on the right contains instructions: 'Start Date = **Date referred to MSTED** (Date must be 11/03/2014 or greater)', 'Funding Stream = **MSTED**', 'Activity Sub Type = **MSTED**', 'Do Not enter a Case Note here. See page 7 for details on adding case notes.', and 'Remember to **Save**.' Arrows point from these instructions to the corresponding fields in the form.

Hide Open Activity

\*Start Date 11/03/2014  
Estimated End Date  
\*Funding Stream MSTED  
Activity Sub Type MSTED  
Estimated Cost \$  
Estimated Hours  
User Defined Text 1  
User Defined Text 2  
User Defined Date

Show Case Note

Show Close Activity

Save Save and Open New Activity Cancel

Start Date = **Date referred to MSTED**  
(Date must be 11/03/2014 or greater)  
Funding Stream = **MSTED**  
Activity Sub Type = **MSTED**  
Do Not enter a Case Note here. See page 7 for details on adding case notes.  
Remember to **Save**.

## ACTIVITY – Edit: Close Activity (MFIP Employment Counselor)

MSTED staff will notify the MFIP Employment Counselor whether or not the participant attended the MSTED orientation.

The **MFIP Employment Counselor** will close the Local Flag (MSTED) activity as NOT SUCCESSFUL if the participant fails to attend up to 2 orientations for MSTED. **Add a Case Note - See page 7.**

If the participant is interested in MSTED again after failing to attend orientation twice, the **MFIP Employment Counselor** will need to restart the referral process and a new Local Flag (MSTED) activity will need to be opened as instructed on page 4.

The **MFIP Employment Counselor** will close the Local Flag (MSTED) activity as SUCCESSFUL if the participant completes the orientation for MSTED. **Add a Case Note - See page 7.**

**General**

- At-A-Glance
- Contact
- Tickler
- MN Works Resume
- Demographics

**Cases**

- Program/New App
- Eligibility/Enrollment
- Activity**

**Activity Summary**

Mary Referral Record ID 100001419  
MAXIS Case 10617170

▼ Hide MFIP Seq 1 - Enrolled

Enrollment Date: 06/17/2014 Exit Date:

Activity: Subtype	Funding Stream	Start Date/End Date	Staff: Agency	Action
Local Flag (MSTED)	MSTED	11/03/2014 Open	Pang Yang WF Solutions	<a href="#">Edit</a> <a href="#">Delete</a> <a href="#">Copy</a>

Click **Edit** to close the activity.

Scroll down to the **Close Activity** section.

▼ Hide Close Activity

End Date

Actual Cost \$

Child Care Provided

Transportation Provided

Completion Results

- End Date = **date info received from MSTED staff**
- Completion Results =  
**Not Successful** for participants that failed to attend the MSTED orientation.  
**Successful** for participants that complete the MSTED orientation.
- Child Care Provided & Transportation Provided = **Yes or No**
- Remember to **Save**.

## ADD CASE ASSIGNMENT (MFIP Employment Counselor)

MSTED staff notifies the MFIP Employment Counselor that the participant has **successfully** completed orientation, necessary paperwork and has agreed to informed consent.

At this time the **MFIP Employment Counselor** will add a Case Assignment of **Secondary Staff** for MSTED staff. This will allow MSTED staff to enter MSTED work activities and case notes into WF1.

NOTE: There may be only two MSTED staff assigned as Secondary staff.

**General**

At-A-Glance  
Contact  
Tickler  
MN Works Resume  
Demographics

**Cases**

Program/New App  
Eligibility/Enrollment  
Activity  
Credential  
TAA  
Plan

**Case Assignment**

**Case Assignment**

Mary Referral Record ID 100001419  
MAXIS Case 10617170

▼ Show Dislocated Worker Seq 1, Eligible, not enrolled

▼ Hide MFIP Seq 1, Enrolled

Case Role	Current Staff	Current Agency: Location	Action
Primary Staff	Pang Yang	Workforce Solutions: Kellogg Blvd. 6th Floor	Transfer
Support Staff	Laurie J Doheny	Workforce Solutions: North St. Paul	Transfer End
Secondary Staff			Add
Placement Staff			Add

Click **Add** to assign the participant to MSTED staff as a Secondary Staff.

**Add Case Assignment**

Mary Referral

**Secondary Staff for MFIP Seq 1**

\*Agency: None Selected ▼  
\*Location: Select Agency First ▼  
\*Staff: Select Agency and Location First ▼  
\*Start Date: [Calendar Icon]

Save Cancel

Agency = **Goodwill/Easter Seals**  
Location = **University Ave**  
**OR**  
Agency = **HIRED**  
Location = **Griggs Midway**  
Staff = **the name of the MSTED staff**  
Start Date = **date notified by MSTED staff**

# ADD CASE NOTE (MFIP Employment Counselor)

The **MFIP Employment Counselor** will add case notes pertaining to MSTED using the **Subject of MSTED**, as shown below.

**Case Note Add**  
**Mary Referral**

**\*Event Date** [Calendar icon]

**\*Note Viewable By** All Staff in Servicing Agency ▼

**\*Program** MFIP (Enrolled) ▼  
[Select/Deselect](#)

**Agency** Workforce Solutions

**Staff Associated** Myself ▼

**Category** Information and Referral ▼  
[Select/Deselect](#)

**Contact Method** None Selected ▼

**\*Status** ☐ Open ☒ Closed

**Subject** MSTED

**\*Note** [Text area]

Spell Check

Save Save and Add New Case Note Cancel

An asterisk (\*) indicates a required field. If any required fields are missing, WF1 will issue an error message highlighting what you must complete before you can save.

**Staff Associated** defaults to "Myself".

**Program** = MFIP

**Category** = **Information & Referral**

**Contact Method** is optional.

**Status** = **Closed**

**Subject** = **MSTED**

Enter case note details here.

Remember to **SAVE**.

**Note Viewable By:** This indicates the level at which case note details are viewable.

- **"All Staff in Servicing Agency"** – this is the DEFAULT level and should be used when entering case notes.
  - Case notes are viewable to any WF1 user **within the agency of the assigned staff**.



# CASE NOTE SEARCH (MFIP Employment Counselor)

This page allows users to search for case notes within a person's record. It is important to use **MSTED** for the Subject Line and in the case note to allow case notes to be found when searching.

General

At-A-Glance

Contact

Tickler

MN Works Resume

Demographics

Cases

Program/New App

Eligibility/Enrollment

Activity

Credential

Plan

Participation Hours

Exit

Follow-Up

Case Assignment

Service Model

DHS-IX

MAXIS

Incoming Status Update

Referral

Case Note

Add Case Note

Case Note Quick

Case Note Search

Service

Support Service

Case Note Search

Mary Referral

Record ID 100001419

MAXIS Case 10617170

Hide Search Criteria

Event Date

10/28/2014

To

01/28/2015

Entry Date

To

Category

Information and Referral

Keyword

MSTED

Within Program Service Dates

All Values

Within Funding Stream Service Dates

All Values

Program

All Values

Staff

All Values

Open Case Notes Only

☐ Yes ☒ No

Run Search

Hide Search Results

Show 25

Disp

Print	Event Date	Subject Line	Entered By	Status	Action
<input type="checkbox"/>	11/03/2014	MSTED	Myself	Closed	

Select All

Deselect All

New Search

Refine Search

Add Case Note

Print Selected

Event Date defaults to the last 3 months, but may be changed.

Category - select Information & Referral

Keyword - enter MSTED

Staff - select your name or leave blank

Click Run Search.

Search Results will appear for the criteria selected.

Options for **Within Program Service Dates** selection include the start and end dates associated with each program/sequence combination. If one of these date ranges is selected, the **Within Funding Stream Service Dates** may not be used.

## ACTIVITY – Add (MSTED staff)

The **MSTED staff** will open the appropriate activity type\* for participants. Whenever an activity is opened, a case note should be entered at the Case Note tab – see page 13.

**NOTE:** The **MFIP Employment Counselor** must have added the MSTED staff as a secondary staff. If this step is not done, the MSTED staff will not be able to add activities to the record and will need to contact the MFIP Employment Counselor to add the MSTED staff as a secondary staff.

General

At-A-Glance

Contact

MN Works Resume

Demographics

Cases

Program/New App

Eligibility/Enrollment

Activity

Exit

Case Assignment

Case Note

Add Case Note

Case Note Quick

Activity Summary

Mary Referral

Record ID 100001419

MAXIS Case 10617170

Hide MFIP Seq 1 - Enrolled

Enrollment Date: 06/17/2014 Exit Date:

Activity: Subtype	Funding Stream	Start Date/End Date	Staff: Agency	Action
Job Search	MFIP Statewide	07/01/2014 Open	Bruce S Casselton WF Solutions	Edit Copy
Local Flag	MFIP Statewide	06/17/2014 Open	Pang Yang WF Solutions	Edit Copy
Assessment	MFIP Statewide	06/17/2014 Open	Pang Yang WF Solutions	

Add MFIP Activity

Click **Add MFIP Activity** to add an activity.

General

At-A-Glance

Tickler

MN Works Resume

Demographics

Cases

Program/New App

Eligibility/Enrollment

MFIP Activity

Mary Referral

Agency: Location

Entered by Laurie J Doheny

\*Assign to Staff

None Selected

\*Activity Type

None Selected

Next

Cancel

Assign to Staff – **select your name** from the drop down box

Activity Type - select **the appropriate work activity\*** from the drop down box

Click the **Next** button.

\*Activity Types (with Sub Type) are:

- **Job Skills Training Directly Related to Employment (MSTED)** = Pre-placement activity
- **Job Search (MSTED)** = Job search at MSTED Provider
- **Employed Full-Time (100)** = 40 hrs/wk of 100% subsidized employment up to 8 weeks
- **Employed Full-Time (50)** = 40 hrs/wk of 50% subsidized employment up to 8 weeks
- **Employed Full-Time (0)** = Working Full-time for MSTED jobsite after subsidy is completed
- **Employed Part-Time (100)** = <40 hrs/wk of 100% subsidized employment up to 8 weeks
- **Employed Part-Time (50)** = <40 hrs/wk of 50% subsidized employment up to 8 weeks
- **Employed Full-Time (0)** = Working Part-time for MSTED jobsite after subsidy is completed
- **Paid Work Experience (MSTED)** = up to 8 weeks of subsidized employment

## ACTIVITY – Add continued (MSTED staff)

The **MSTED staff** will enter the required information, as indicated below, for MSTED participants.

NOTE: All activities entered in WF1 by MSTED staff must have the Funding Stream of MSTED.

<b>General</b>	<b>MFIP Activity</b>	
At-A-Glance	<b>Mary Referral</b>	<b>Record ID 100001419</b> <b>MAXIS Case 10617170</b>
Contact	<b>Program Seq</b> 1	
Tickler	<b>Agency: Location</b> Workforce Solutions: North St. Paul	
MN Works Resume	<b>Entered by</b> Laurie J Doheny	
Demographics	<b>Assign to Staff</b> Doheny, Laurie (Current Secondary)	
<b>Cases</b>	<b>Activity Type</b> Employed Full-Time	<input type="button" value="Change to Employed Part-Time"/>
Program/New App	<input type="button" value="Change Activity/Staff"/>	
Eligibility/Enrollment		
<b>Activity</b>		
Credential	▼ Hide Open Activity	
Plan	*Start Date	11/03/2014
Participation Hours	Estimated End Date	
Exit	*Funding Stream	MSTED
Follow-Up	Activity Sub Type	100
Case Assignment	Estimated Cost	\$
Service Model	Estimated Hours	
<b>DHS-IX</b>	User Defined Text 1	
MAXIS	User Defined Text 2	
Incoming Status Update	User Defined Date	
Referral	▼ Hide Employment Info	
<b>Case Note</b>	*Employer Name	
Add Case Note	*Hourly Wage	\$
Case Note Quick	*Occupational Title (O*NET)	
Case Note Search	Clear O*NET code for new search. <input type="button" value="Search/Validate O*NET"/>	
<b>Service</b>	▼ Show Comments	
Support Service	▼ Show Case Note	
<b>Assessment</b>	▼ Show Close Activity	
DHS Assessment		
Reading/Math Test		
<b>Form/Letter/Schedule</b>		
Appointment		
Session		
NOITS		
<b>History</b>		
Audit		

**Start Date** = enter **Date activity started**  
(Date must be 11/03/2014 or greater)

**Funding Stream** = select **MSTED**

**Activity Sub Type** = enter **appropriate sub type\*** as noted on page 9

- \* **MSTED** for Job Skills Training Directly Related to Employment, Job Search & Paid Work Experience
- \* **100** for Employed Full-Time & Employed Part-Time
- \* **50** for Employed Full-Time & Employed Part-Time
- \* **0** for Employed Full-Time & Employed Part-Time after subsidy is completed

The following **Employment Info** is required for work activities:

- **Employer Name** = enter Company Name
- **Hourly Wage** = enter amount being paid hourly
- **Occupation Title Code** – search for the O\*NET code by clicking the search button

**Do Not** enter a Case Note here. See page 14 for details on adding case notes.

Remember to **Save**.

## ACTIVITY – Edit: Close Activity (MSTED staff)

The **MSTED staff** will close the MSTED pre-placement activity once completed and the MSTED work activities prior to, or at the time of, reaching 8 weeks of work (per activity).

A case note should be entered at the Add Case Note tab – see page 14.

<b>General</b>	<b>Activity Summary</b>				
At-A-Glance	<b>Mary Referral</b>				<b>Record ID 100001419</b>
Contact					<b>MAXIS Case 10617170</b>
Tickler	▼ Hide MFIP Seq 1 - Enrolled				
MN Works Resume	Enrollment Date: 06/17/2014 Exit Date:				
Demographics					
<b>Cases</b>					
Program/New App					
Eligibility/Enrollment					
<b>Activity</b>					
Credential					
	<b>Activity: Subtype</b>	<b>Funding Stream</b>	<b>Start Date/End Date</b>	<b>Staff: Agency</b>	
	Local Flag (MSTED)	MSTED	11/03/2014 Open	Pang Yang WF Solutions	Edit Delete Copy
	Employed FT (100)	MSTED MSTED	11/03/2014 Open	Laurie J Doheny WF Solutions	Edit Delete Copy

Click **Edit** to close the activity.

Scroll down to the **Close Activity** section.

▼ Hide Close Activity	
<b>End Date</b>	<input type="text"/>
<b>Actual Cost</b>	\$ <input type="text"/>
<b>Child Care Provided</b>	None Selected ▼
<b>Transportation Provided</b>	None Selected ▼
<b>Completion Results</b> None Selected ▼	
Save Save and Open New Activity Cancel	

- **End Date** = enter **date work activity ended**
- **Completion Results** = select **Not Successful** or **Successful**
- **Child Care Provided & Transportation Provided** = select **No**
- Remember to **Save**.

# SERVICE MODEL (MSTED staff)

MSTED staff will open the appropriate Service Model for participants.

- The **MSTED Control** Service Model will always start and end on the same date.
- The **MSTED Treatment** Service Model will most likely start and end on different dates.

General

At-A-Glance

Contact

Tickler

MN Works Resume

Demographics

Cases

Program/New App

Eligibility/Enrollment

Activity

Credential

TAA

Plan

WIA YY Goals

MYP Performance

Participation Hours

Exit

Follow-Up

Case Assignment

Service Model

### Service Model Assignment

Mary Referral Record ID 100001419  
MAXIS Case 10617170

▼ Hide MFIP Seq 1 - Enrolled

No Service Models found.

[Add Service Model](#)

Click **Add Service Model**  
The page below will open.

### Service Model Assignment Add/Edit

Mary Referral

\*Service Model None Selected ▼

\*Start Date

End Date

[Save](#) [Cancel](#)

**Service Model = MSTED Control or MSTED Treatment**

**Start Date = Date assigned to Control or Treatment**

**End Date for MSTED Control = Same date as start date – the end date should be entered when the start date is entered**

**End Date for MSTED Treatment = Date participation ends**

Shown below is an example of **MSTED Treatment** Service Model, with a blank End Date. The End Date will need to be entered once participation ends.

General

At-A-Glance

Contact

### Service Model Assignment

Mary Referral Record ID 100001419  
MAXIS Case 10617170

▼ Hide MFIP Seq 1 - Enrolled

Service Model	Start Date	End Date	Action
MSTED Treatment	11/03/2014		<a href="#">Edit</a>

Click **End** to enter the End Date.

## SUPPORT SERVICE (MSTED staff)

Participants assigned to the **Control** group will receive a \$100 gift card and will return to regular MFIP employment services. **MSTED Staff** will add the \$100 gift card as a Support Service for **Control** participants and then enter a final case note, end the Service Model and end their secondary staff assignment to the record.

Service	Support Services Summary	
Support Service	Mary Referral	Record ID 100001419 MAXIS Case 10617170
▼ Hide MFIP Seq 1 - Enrolled		
No support services exist for this program sequence.		
<div>Click <b>Add Support Service</b></div> <div>Add Support Service</div>		

### Support Service Add/Edit

Mary Referral

Program Seq MFIP Seq 1  
Entered by Laurie J Doheny  
\*Staff Assigned None Selected  
\*Support Service Other Services  
\*Service Date  
\*Actual Amount \$ 100.00  
\*Funding Stream MSTED

Additional Description ☐ Add as Case Note

\$100 gift card

Spell Check

Save Save and Add Support Service Cancel

Staff Assigned = select **your name**

Support Service = select **Other Services**

Service Date = **date gift card given**

Actual Amount = enter **100.00**

Funding Stream = select **MSTED**

Additional Description = enter **\$100 gift card**

**Do Not add as case note.** See page 14 for adding case notes.

Remember to **Save**.

# ADD CASE NOTE (MSTED staff)

The **MSTED Staff** will add case notes pertaining to MSTED using the **Subject of MSTED**, as shown below.  
**Remember to follow the HIPAA Compliance for Case Notes**, found on page 19.

**Case Note Add**  
**Mary Referral**

\*Event Date

\*Note Viewable By All Staff in Servicing Agency

\*Program MFIP (Enrolled)  
[Select/Deselect](#)

Agency Workforce Solutions

Staff Associated Myself

Category Information and Referral  
[Select/Deselect](#)

Contact Method None Selected

\*Status Open Closed

Subject MSTED

\*Note

Spell Check

Save Save and Add New Case Note Cancel

An asterisk (\*) indicates a required field. If any required fields are missing, WF1 will issue an error message highlighting what you must complete before you can save.

Staff Associated defaults to "Myself".

Program = MFIP

Category = **Information & Referral**

Contact Method is optional.

Status = **Closed**

Subject = **MSTED**

Enter case note details here.

Remember to **SAVE**.

**Note Viewable By:** This indicates the level at which case note details are viewable.

- "All Staff in Servicing Agency" – this is the DEFAULT level and should be used when entering case notes.
  - Case notes are viewable to any WF1 user **within the agency of the assigned staff**.

A final case note should be entered when participation with MSTED has ended.

The following should be used for the exit case note:

- **Category = Closure/Exit**
- **Subject = MSTED (list the exit reason\*)**

\*Reasons are found on the **WF1 Quick Reference of MSTED Program Exit Process**

## CASE NOTE QUICK (MSTED staff)

This page provides a summary of the last five case notes case notes created for the person with the most recent Event Date first. Program and security permissions determine what a user can view.

**General**  
At-A-Glance  
Contact  
MN Works Resume  
Demographics

**Cases**  
Program/New App  
Eligibility/Enrollment  
Activity  
Exit  
Case Assignment

**Case Note**  
Add Case Note

**Case Note Quick**  
Case Note Search

**History**  
Audit

### Case Note Quick View

Mary Referral

Collapse Panels

Expand Panels

▼ Hide 11/03/2014 MSTED

**Program** MFIP

**Category** Information and Referral

**Note**  
MSTED subsidized FT employment began today at ABC. Participant is working 40 hrs/wk at 100% subsidy.

**Staff Assigned** MSTED Staff's name

**Agency** Workforce Solutions

**Entry Date** 01/28/2015 12:33 PM

**By** MSTED Staff's name

**Last Updated**

**By**

▼ Hide 10/01/2014 MSTED

**Program** MFIP

**Category** Information and Referral

**Note**  
MSTED eligibility confirmed, lottery process explained and participant agrees to attend orientation.

**Staff Assigned** Laurie J Doheny

**Agency** Workforce Solutions

**Entry Date** 10/23/2014 10:22 AM

**By** Laurie J Doheny

**Last Updated**

**By**

The panel header will display the Event Date along with the Subject text where the user has chosen to enter free-form text. If no Subject text has been entered, the first 75 characters of the note text will display.

Whether a case note is viewable is determined by whether the case note was set to **"All Staff in Servicing Agency"** by the creator, as stated on page 14. Case notes created at another Servicing Agency will not be viewable.

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Ramsey County Workforce Solutions, MIS Unit Revised 10/20/2015



## CASE NOTE SEARCH (MSTED staff)

This page allows users to search for case notes within a person's record. It is important to use **MSTED** for the Subject Line and in the case note to allow case notes to be found when searching.

General

At-A-Glance

Contact

Tickler

MN Works Resume

Demographics

Cases

Program/New App

Eligibility/Enrollment

Activity

Credential

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Follow-Up

Case Assignment

Service Model

DHS-IX

MAXIS

Incoming Status Update

Referral

Case Note

Add Case Note

Case Note Quick

Case Note Search

Service

Support Service

Case Note Search

Mary Referral

Record ID 100001419

MAXIS Case 10617170

Hide Search Criteria

Event Date

10/28/2014

To

01/28/2015

Entry Date

To

Category

Information and Referral

Keyword

MSTED

Within Program Service Dates

All Values

Within Funding Stream Service Dates

All Values

Program

All Values

Staff

All Values

Open Case Notes Only

☐ Yes ☒ No

Run Search

Hide Search Results

Print

Event Date

Subject Line

Entered By

Status

Action

☐

11/03/2014

MSTED

Myself

Closed

Select All

Deselect All

New Search

Refine Search

Add Case Note

Print Selected

Event Date defaults to the last 3 months, but may be changed.

Category - select Information & Referral

Keyword - enter MSTED

Staff - select your name or leave blank

Click Run Search.

Search Results will appear for the criteria selected.

Options for **Within Program Service Dates** selection include the start and end dates associated with each program/sequence combination. If one of these date ranges is selected, the "Within Funding Stream Service Dates" may not be used.

# END CASE ASSIGNMENT (MSTED staff)

The **MSTED staff** will end their secondary case assignment to the participant's record when one of the following occurs:

- Participant is exiting MFIP and the MFIP Employment Counselor makes request.  
EXCEPTION: There may be instances when participants' MFIP closes, yet they are still in the treatment group; do not end your case assignment. Case notes should still be entered in the WF1 record; however, activities will not be allowed since the record has been exited.
- Participant has completed the MSTED program and all MSTED activities are closed; i.e. 90-days after follow-up.
- End Date has been entered for the MSTED Service Model
- Control participant's gift card has been entered as a Support Service (see page 13)

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Case Assignment

Case Assignment

Mary Referral

Record ID 100001419  
MAXIS Case 10617170

Show Dislocated Worker Seq 1, Eligible, not enrolled

Hide MFIP Seq 1, Enrolled

Case Role	Current Staff	Current Agency: Location	Action
Primary Staff	Pang Yang	Workforce Solutions: Kellogg Blvd. 6th Floor	
Support Staff			
Secondary Staff	Laurie J Doheny	Workforce Solutions: North St. Paul	Add Transfer End
Placement Staff			

End Case Assignment

Mary Referral

Record ID 100001419  
MAXIS Case 10617170

Secondary Staff for MFIP Seq 1

End Assignment

\*End Date

Save

Cancel

Click End

End Date = the date that the participant is no longer active with MSTED.  
Remember to Save.

**NOTE:** Be sure that the participant's record is up-to-date with Case Notes, Activities and Service Model before ending your assignment to the record.

# RE-REFERRALS TO MSTED (MFIP Employment Counselor and MSTED staff)

There could be two types of re-referrals to MSTED:

- **Exited MFIP Participants that have re-enrolled in MFIP**

There may be a scenario where a participant exits MFIP. When this happens, all activities are closed, including any MSTED activity.

If the person returns to MFIP, a new MFIP sequence will be opened and the participant may be referred to MSTED again, as long as they haven't used all their weeks of subsidized work.

The **MFIP Employment Counselor** will open and close a new **Local Flag (MSTED)** activity (shown on page 4) under the new MFIP sequence indicating re-referral to MSTED, and continue to follow the same steps outlined in this training guide.

The **MSTED staff** will notify the MFIP Employment Counselor of Secondary Staff assignment. Once the MSTED staff is assigned as Secondary staff, he/she will open the appropriate activity (shown on page 9) under the new MFIP sequence and continue to follow the same steps outlined in this training guide.

- **MSTED participants that were not connected to either subsidized opportunity, but remain open on MFIP**

There may be a scenario where a participant did not begin subsidized employment after being assigned to MSTED Treatment and their participation has ended; thus all MSTED activities and the MSTED Service Model were closed. When this happens, the participant has the opportunity to reconnect with MSTED later.

The **MFIP Employment Counselor** will communicate to the MSTED staff the participant's interest in reconnecting with MSTED. Once reconnection approved, the **MFIP Employment Counselor** will follow the step on page 6 to reassign the MSTED staff as Secondary Staff to the participant's record. The **MFIP Employment Counselor** will also enter Case Notes as outlined on page 8.

The **MSTED staff** (once assigned as Secondary staff) will open the appropriate activity under the same MFIP sequence and continue to follow the same steps outlined in this training guide beginning on page 9.

Date: May 7, 2010

To: Employment Services Providers  
Tribal Employment Services Providers  
County Directors

From: Jane Delage, MFIP Program Manager, DHS Transition to Economic Stability Div.

Jim Korkka, Director of Adult Services, DEED Workforce Development Division

Subject: HIPAA Compliance for case notes and employability measure

This memo is in response to employment service providers' request for clarification on what can be case noted or entered into the Employability Measure as it pertains to mental health, chemical health and physical health disclosures to maintain federal law and HIPAA compliance.

The Health Insurance Portability and Accountability Act of 1996 (HIPAA), established the HIPAA Privacy Rule in December of 2000. The HIPAA Privacy Rule is a federal rule designed to protect individuals' medical records and other Personal Health Information.

In the course of business, an employment service provider receives, discloses and utilizes participants' Protected Health Information for a variety of reasons. Counties should establish measures to ensure that health information is not accessible to anyone other than authorized personnel. Workforce One security provisions are sufficient to meet criteria for an electronic record. Staff working within the "welfare system" which includes employment services providers under contract with the county and tribal employment services providers under contract with the Department of Human Services must maintain privacy, confidentiality and integrity with regard to Protected Health Information as required by state and federal laws, rules and regulations and professional ethics. Confidential information includes oral, written, and electronic information.

Case notes and comments in the Employability Measure regarding documented medical conditions require extra caution due to HIPAA regulations. Only the "minimum necessary" information should be included and this should rarely include an actual diagnosis. The documentation in WF1 case notes or in the comments of the Employability Measure should be more generic, e.g. "medical condition present, see case file," or "medical condition present that restricts activities, see case file," or "mental health issues present, see case file." Those references alert subsequent Job Counselors to investigate when planning later participation activities and developing employment plans.

When a participant discloses a medical, mental or chemical health condition but they do not have documentation to support the claim, information can be written on the Employability Measure or in a case note e.g. "participant stated she is feeling depressed, assisted participant in making an appointment for an assessment."

The Employment Services Rights, Responsibilities and Consent form (DHS-3172) informs a participant that information is shared across the "welfare system" when appropriate. The "welfare system" includes Job Counselors, Financial Workers and Child Care Workers.

The Employment Services Rights, Responsibilities and Consent form (DHS-3172) was recently updated to ensure all federal law protecting chemical health data and HIPAA concerns are addressed (see link to e-Docs below).

Participants must sign the new Employment Services Rights Responsibilities and Consent form at their next scheduled appointment. Please share this information with your staff.

<https://edocs.dhs.state.mn.us/fserver/Public/DHS-3172-ENG>

Please contact Danielle Kressin at [Danielle.kressin@state.mn.us](mailto:Danielle.kressin@state.mn.us) or 651-259-7545 if you have any questions regarding this memo.