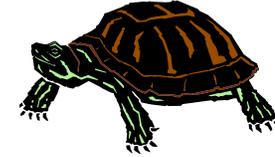


Workforce One

CLUES Partners for Equity (PE) User Guide

January 1, 2020 – December 31, 2024



CLUES is delivering comprehensive, strength-based, and culturally specific family stability services to our MFIP Latino/Latina/Hispanic families

MFIP Employment Counselors refer MFIP Latino/Latina/Hispanic families to the Partners for Equity program by sending a completed **Partners for Equity Referral Form** to CLUES Staff

This training guide indicates the WF1 process that will be completed by the **CLUES Staff** (items in purple & black) and **MFIP Employment Counselor** (items in green & black)

Searching for a Person	Page 1
Person at-a-Glance	Page 2
Add Activity - Local Flag	Page 3
Add Activity – Job Search, GED, ESL	Page 4
Activity and Workshop/Session Crosswalk	Page 6
Closing Activities	Page 7
Add Case Note	Page 8
Add Participation Hours	Page 9

SEARCHING FOR A PERSON

You may search for a person by Name, SSN (social security number) or MAXIS number.

Person Search

▼ Hide Search Criteria

Last Name: newberg

First Name: e*

Middle Initial:

SSN:

Record ID:

MAXIS Case:

MAXIS PMI:

E-mail:

Staff Assigned: All Values

Run Search Show Additional Criteria

▼ Hide Search Results

Name: Birth Date ▼	SSN	Record ID	MAXIS Case	MAXIS PMI
Newberg, Evelyn 06/22/1980	6588	202013600	135626588	35626588

New Search Refine Search Add New Person

The Last Name and First Name fields each allow a single wildcard character in the search. The wildcard character is an asterisk (*). 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.).

It is also recommended to search only by MAXIS Case if you don't find the person when searching by the name.

Click Run Search.

If the name **is** found, confirm that it is the same person by viewing the DOB, SSN, etc.

Once confirmed, click on the appropriate person's name.

▼ Hide Search Results

No results found.

New Search Refine Search Add New Person

Or if no results found, contact the **referring MFIP Employment Counselor**.

NOTE: You will never use the Add New Person button. All participants referred to CLUES will already have a person record in WF1.

PERSON AT-A-GLANCE

The panel below appears once you click on a Person's name.

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

Measurable Skills Gain

Reporting Collection

Person At-A-Glance

Evelyn Newberg **Record ID 202013600**
Birth Date 06/22/1980 **MAXIS Case 135626588**

Name and Mailing Address
 Evelyn Newberg
 1234 Evelyn Street
 St. Paul 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
651-555-1255		Home	No	No

Birth Date 06/22/1980
 No E-mail Data Available

Record ID 202013600
MAXIS Case 135626588

Program	Status	Application Date	Enroll Date	Exit Date	Closed from App Date	Last Follow-up Date	COFFR
MFIP Seq 1	Enrolled	01/07/2019	01/07/2019				Ramsey Cty (15)

The **Person-at-a-Glance** panel provides a list of all programs in WF1 for the person.

The participant's **Status** must be listed as **Enrolled** and the **COFFR** must be listed as **Ramsey Cty (15)** to continue.

If these items are not appearing as below, contact the **referring MFIP Employment Counselor**.

ADD ACTIVITY – Local Flag (CLUES)

CLUES Staff will enter a **Local Flag (CLUES)** activity when a CLUES PE program referral is received from the MFIP Employment Counselor and CLUES Staff begin working with the participant.

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

Activity Summary

Evelyn Newberg
Birth Date 06/22/1980

Record ID 202013600
MAXIS Case 135626588

Hide MFIP Seq 1 - Enrolled

Enrollment Date: 01/07/2019 Exit Date:

Activity: Subtype: Work Exp Type	Funding Stream	Start Date/End Date	Staff: Agency
Local Flag	MFIP State-wide	01/07/2019 Open	Laurie J Doheny WF Solutions

Add MFIP Activity

Click the **Activity** tab under the left navigation panel

Click **Add MFIP Activity**

MFIP Activity

Evelyn Newberg
Birth Date 06/22/1980

Record ID 202013600
MAXIS Case 135626588

Program Seq 1

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

Enrollment Date 01/07/2019

Entered by Laurie J Doheny

*Assign to Staff Doheny, Laurie (Current Primary) ▼

*Activity Type **Local Flag** ▼

Next Cancel

Activity Type = **Local Flag**

Click **Next**

ADD ACTIVITY – Local Flag (CLUES) continued:

A red asterisk will indicate a required field when adding activities, and all required fields must be entered.

The **Activity Subtype** does not have an asterisk, but it requires **CLUES** to be entered for the **Local Flag** activity.

General

MFIP Activity

Evelyn Newberg **Record ID 202013600**
Birth Date 06/22/1980 **MAXIS Case 135626588**

Program Seq 1
Agency: Location Ramsey County Workforce Solutions: North St. Paul
Enrollment Date 01/07/2019
Entered by Laurie J Doheny
Assign to Staff Doheny, Laurie (Current Primary)

Activity Type Local Flag

Change Activity/Staff

Activity

Hide Open Activity

*Start Date
Estimated End Date
Funding Stream MFIP State-wide
Activity Subtype CLUES
Estimated Cost \$
Estimated Hours
User Defined Text 1
User Defined Text 2
User Defined Date

Hide Close Activity

End Date
Actual Cost \$
Child Care Provided None Selected
Transportation Provided None Selected
Completion Results None Selected
Actual Hours

Save Save and Open New Activity Cancel

Start Date = the **Date** the participant was referred to CLUES Partners for Equity program

Activity Subtype = **CLUES**

Remember to **Save**

NOTE: This Activity should be closed when the participant is no longer participating in the CLUES PE program. Go to page 7 for instructions.

ADD ACTIVITY – ESL Training (CLUES), GED Training (CLUES), Job Search (CLUES)

The **MFIP Employment Counselor** will be provided the following information by **CLUES Staff**, allowing the MFIP Employment Counselor to enter participation hours and activities in the participant's WF1 record:

- A weekly Case Note entered in the participant's WF1 record indicating the scheduled workshop/session and the hours that the participant attended;
- Supporting documents of the participant's attendance and/or completion of the workshop/session.

The **MFIP Employment Counselor** will enter a corresponding activity in WF1 for the workshop/session outlined in the Case Note entered by CLUES Staff. See page 6 for crosswalk.

A red asterisk will indicate a required field when adding activities, and all required fields must be entered.

The **Activity Subtype** does not have an asterisk, but it requires **CLUES** to be entered for the corresponding workshop/session activity.

The screenshot shows the 'MFIP Activity' form for Evelyn Newberg. The left sidebar has 'Activity' circled. A callout box on the right provides instructions for several fields:

- Activity Type** = GED Training, ESL Training and/or Job Search
- Start Date** = the **Date** that CLUES Staff indicated in Case Notes that the participant started the activity
- Activity Subtype** = CLUES
- Remember to **Save**
- NOTE:** Some of the **Job Search** activities are short in time, thus opening a new **Job Search (CLUES)** activity for each workshop/session is not necessary if they are attended closely in time. The original **Job Search (CLUES)** activity may remain open, allowing the tracking of all hours under the one activity, until the Job Search is completed totally.

The form fields shown include: Program Seq (1), Agency: Location (Ramsey County Workforce Solutions: North St. Paul), Enrollment Date (01/07/2019), Entered by (Laurie J Doheny), Assign to Staff (Doheny, Laurie (Current Primary)), and Activity Type (highlighted). The 'Hide Open Activity' section contains: Start Date (highlighted with a red asterisk), Estimated End Date, Funding Stream (MFIP State-wide), Activity Subtype (CLUES, highlighted), Estimated Cost, Estimated Hours, and three User Defined Text fields.

ACTIVITY AND WORKSHOP/SESSION CROSSWALK

The **Job Search (CLUES)** activity should be opened if the participant attends any of the following **CLUES PE program** workshops/sessions:

- **PTE (Pathway to Employment)**
- **Financial Literacy**
- **Job Club**
- **Platicas en Familia**
- **YA! (Youth in Action)**
- **Citizenship Classes**
- **Voting Awareness**

NOTE: Some of the **Job Search** activities are short in time, thus opening a new **Job Search (CLUES)** activity for each workshop/session is not necessary if they are attended closely in time. The original **Job Search (CLUES)** activity may remain open, allowing the tracking of all hours under the one activity, until the Job Search is completed totally.

The **ESL Training (CLUES)** activity should be opened if the participant attends the following **CLUES PE program** workshop/session:

- **ESL (English as a Second Language)**

The **GED Training (CLUES)** activity should be opened if the participant attends the following **CLUES PE program** workshop/session:

- **GED Prep**

CLOSING ACTIVITIES

All activities enrolled for the **CLUES PE program** should be closed once the participant is no longer partaking in the activity. The only exception is the **Local Flag (CLUES)** activity, which will remain open until the participant leaves the **CLUES PE program**.

To close activities, click on the **Activity** tab and the panel below will appear.

Activity Summary

Evelyn Newberg
Birth Date 06/22/1980

Record ID 202013600
MAXIS Case 135626588

Hide MFIP Seq 1 - Enrolled

Enrollment Date: 01/07/2019 Exit Date:

Activity	Subtype	Work Exp Type	Funding Stream	Start Date/End Date	Staff: Agency	Action
Job Search (CLUES)			MFIP State-wide	08/31/2020 Open	Laurie J Doheny WF Solutions	Edit Delete Copy
Local Flag (CLUES)			MFIP State-wide	08/24/2020 Open	Laurie J Doheny WF Solutions	Edit
Job Search			MFIP State-wide	02/01/2019 Open	Laurie J Doheny WF Solutions	Edit
Assessment			MFIP State-wide	01/30/2019 Open	Laurie J Doheny WF Solutions	Edit

Click **Edit** for the Activity that will be closing. This example indicates that the **Job Search (CLUES)** activity is closing.

The Activity panel will appear.

Click **Go to Close Activity Panel** and enter the following items.

End Date = Date the activity ended

Completion Results - select appropriate item

Child Care Provided - select appropriate item

Transportation Provided - select appropriate item

Remember to **Save**.

MFIP Activity

Evelyn Newberg
Birth Date 06/22/1980

Record ID 202013600
MAXIS Case 135626588

Program Seq 1

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

Enrollment Date 01/07/2019

Entered by Laurie J Doheny

Assign to Staff Doheny, Laurie (Current Primary Staff)

Activity Type Job Search

Go to Close Activity Panel

Hide Close Activity

End Date

Actual Cost \$

Child Care Provided

Transportation Provided

Completion Results

Actual Hours

Save Save and Open New Activity Cancel

ADD CASE NOTE indicating Workshops/Sessions and Hours Attended

CLUES Staff will:

- Enter a weekly Case Note in the participant's WF1 record indicating the scheduled workshop/session and the hours that the participant attended. This information is used by the **MFIP Employment Counselor** to enter participation hours in WF1.
- Email supporting documents, to the **MFIP Employment Counselor**, of the participant's attendance and/or completion of the workshop/session.

To add **Case Notes**, click on the **Add Case Note** tab and the panel below will appear.

Besides the items marked with a red asterisk, the items highlighted below are also required when adding **Case Notes**.

The following items are required when adding case notes:

- Event Date** = Date that the details in the case note occurred
- Note Viewable By** = All Staff in Servicing Agency
- Program** = MFIP (Open)
- Staff Associated** = YOUR Name
- Category** = Participation Hours
- Contact Type** = Most appropriate item.
Type indicates if the contact was live* contact
- Status** = Closed
- Subject** = CLUES
- Enter case note detail indicating the workshop/session attended and total number of hours
- Remember to SAVE**

*Live contact is one-to-one contact between staff and participant (**the participant must respond**) in any of the following forms.

- In-person conversation between participant & staff;
- Telephone conversation between participant & staff (or voicemail from participant);
- Electronic message between participant & staff, including email, text message, instant message, or message sent via social media
- Postal mail update from participant

ADD PARTICIPATION HOURS

The **MFIP Employment Counselor** will enter participation hours in the participant's WF1 record using the following information provided by **CLUES Staff**:

- A weekly Case Note entered in the participant's WF1 record indicating the scheduled workshop/session and the hours that the participant attended;
- Supporting documents of the participant's attendance and/or completion of the workshop/session.

For detail steps, refer to the **WF1 User Guide – Participation Hours** listed on the providers web page.