

Workforce One

WF1 Connect User Guide

June 2021

WF1 Connect app was created to simplify communications and provide greater access to financial benefits & services for participants of employment and economic support programs.

It is mandatory for Staff to introduce and offer WF1 Connect to participants; however, their participation is voluntary.

The messaging is safe, secure and simple, allowing multiple assigned staff to receive the same information at the same time.

WF1 Connect also allows document sharing between staff and participants, with the convenience of uploading to WF1 EDS.

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CREATE A MOBILE USER or OPT OUT/INACTIVATE

It is mandatory for Staff to introduce and offer WF1 Connect to participants; however, their participation is voluntary.

The **Mobile User Add** functionality in WF1 gives staff the ability to add a participant to **WF1 Connect** so they can download and use the **WF1 Connect** app. Once the participant has agreed to use the **WF1 Connect** app, the participant will need to provide a valid email to you. The email provided should be unique to the participant and should not be a shared email.

Click **Contact** on the left navigation menu.

- If there is not a current, valid email listed, you will need to add the email the participant has provided to you.
- If there is an email listed, you must confirm with the participant that it is a valid email.

The email listed will then display on the **Mobile User Add** panel.

Contact Information

Alex Newberg
Birth Date 06/22/1980
Record ID 202013500
MAXIS Case 135626584

*Last Name: Newberg *First Name: Alex MI:
Alias Last: Alias First: Alias MI:
Preferred First Name:
Pronoun: None Selected

Phone	Ext.	Phone Type	If other, please specify:	TTY	Video
(651) 555-1255		Home	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>
(651) 555-5555		Cell	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="text"/>		None Selected	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="text"/>		None Selected	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>

Ok with receiving text messages: None Selected

E-mail: alex.newberg@gmail.com, newberg80@email.com
E-mail Type: Personal 1, Personal 2

Save

E-mail – Enter a valid email received from the participant or confirm that the existing email is valid. The email must be listed in the **top/1st** email field.

E-mail Type = **Personal 1***
*If any other item is selected, the email listed will not appear under the Mobile User Add panel

Click **Save**

CREATE A MOBILE USER or OPT OUT/INACTIVATE continued:

Click **Mobile User** on the left navigation menu to create a **New User** or to **Opt Out**.

- **Opt Out:** The participant may choose to opt out of becoming a **Mobile User**.

The screenshot shows the 'Mobile User Add' form for Alex Newberg. The 'Mobile User Status' dropdown is set to 'Opted Out'. The 'Opted Out Date' field is empty. A callout box on the right contains the following text:

Mobile User Status = Opted Out
Opted Out Date – Enter Date
Click Save

- **New User:** Once email is listed on the **Contact** panel (shown on previous page), it will appear on the **Mobile User Add** panel.

The screenshot shows the 'Mobile User Add' form for Alex Newberg. The 'Mobile User Status' dropdown is set to 'New User'. The 'Personal 1 E-mail' field contains 'alex.newberg@gmail.com'. The 'Use Personal 1 E-mail as Username' checkbox is checked. A callout box on the right contains the following text:

Mobile User Status = New User
 The **Personal 1** email entered on the **Contact** panel appears here
Check Box next to **Use Personal 1 E-mail as Username** and the email will now display as the **Username**

The screenshot shows the 'Mobile User Add' form for Alex Newberg. The 'Mobile User Status' dropdown is set to 'New User'. The 'Personal 1 E-mail' field contains 'alex.newberg@gmail.com'. The 'Use Personal 1 E-mail as Username' checkbox is checked. The 'Username' field contains 'alex.newberg@gmail.com'. A callout box on the right contains the following text:

Click Search Other Record IDs for this Username
 WF1 will check for the same Username used in any other record and will list any results found

The dialog box contains the following text:

Select the name to attach.
 No other Record IDs found for this username.
 Cancel

If any other record is found, you must work with your participant to create another email that is unique to the participant.
Enter the new email in the **Username**, then
Click Search Other Record IDs for this Username to make sure the new email is unique

CREATE A MOBILE USER or OPT OUT/INACTIVATE continued:

Click **Send Welcome E-mail to Person** to finalize the account in WF1. The participant will get an email displaying their username and temporary password that they will use for their initial log in after downloading the **WF1 Connect** app.

Mobile User Add

Alex Newberg
Birth Date 06/22/1980

Record ID 202013500
MAXIS Case 135626584

*Mobile User Status: New User

Personal 1 E-mail: alex.newberg@gmail.com

Use Personal 1 E-mail as Username

*Username: alex.newberg@gmail.com

Search Other Record IDs for this Username

Comments

Spell Check

It may take several seconds to set up mobile user account.

Send Welcome E-mail to Person Cancel

Mobile User Status = **New User**

Use Personal 1 E-mail as Username box is checked

Click **Send Welcome E-mail to Person**

WF1 will display: **Mobile User Created**

WF1 has now generated an email to the participant. An example is displayed on the next page.

Person At-A-Glance

Alex Newberg
Birth Date 06/22/1980

Record ID 202013500
MAXIS Case 135626584

Mobile User created.

- Inactivate User:** If a participant no longer wants to use **WF1 Connect**, you will need to **Inactivate** their **Mobile User Status**.

Mobile User Add

Alex Newberg
Birth Date 06/22/1980

*Mobile User Status: Inactive

Personal 1 E-mail: laurie.doheny@co.ramsey.mn.us

Username: laurie.doheny@co.ramsey.mn.us

User Locked: No

Last Login Date: 05/27/2021 03:09 PM

Mobile Consent Status: Agreed

Mobile Consent Date: 05/24/2021 05:09 PM

Save

Mobile User Status = **Inactive**

Click **Save**

NOTE: If the participant later wants to use **WF1 Connect**, you may change the **Mobile User Status** back to **Active**

NOTE: Pages 4-6 provide the steps that the participant needs to complete. Staff guidance continues on page 7.

PARTICIPANT STEPS TO ACCESS WF1 CONNECT

The email shown below is an example of what the **participant** will receive once you have finished the steps on pages 1-3. The **participant** will need to complete the steps outlined in the email to finish the **WF1 Connect** setup.

Mon 5/24/2021 3:35 PM

 noreply.WF1Connect@state.mn.us
Welcome to WF1 Connect!

To Goodwitch, Glinda

Welcome Glinda,

Thank you for choosing to use Workforce One (WF1) Connect. This free app is a new way for you to communicate with your employment counselor, financial or child care worker. We created an account for you and now need you to complete the following three steps to finish the Workforce One Connect setup.

Step 1: Download the app by going to either the App Store for iPhone or Google Play Store for Android and type 'Workforce One Connect' in the search field. Select the app from the list, select the **Install** button, and then select the **Open** button.

Step 2: Log in with your temporary password. Note: The temporary password needs to be entered exactly as shown below.

Your Username: glinda.d.goodwitch@gmail.com

Your Temporary Password: aV0@Jztl

Step 3: Once you log in, you will be sent to a page to change your password, and add three challenge questions. You will receive an e-mail confirming that your password has been changed.

If you then have any questions, please contact your employment counselor, financial, or child care worker.

Thank you for choosing Workforce One Connect.

(Do not reply to this message. Replies to this message are undeliverable)

Inform your **participant** that the 3 steps listed in the email from WF1 Connect need to be completed to finish setup

NOTE: Pages 4-6 provide the steps that the participant needs to complete. Staff guidance continues on page 7.

PARTICIPANT STEPS TO ACCESS WF1 CONNECT continued:

Once the participant downloads the **Workforce One Connect** app to their phone, the following steps will need to be completed by the participant to access the **WF1 Connect** app.

Step 1:
Enter the WF1 Connect **Username** listed in the email
Click **Next**

Step 2:
Enter the WF1 Connect **Temporary Password** listed in the email
Enter **New Password**
Select **Challenge Questions** and Enter **Answers**
Click **Save**

NOTE: Participant's Username/Email address will appear here

NOTE: Pages 4-6 provide the steps that the participant needs to complete. Staff guidance continues on page 7.

PARTICIPANT STEPS TO ACCESS WF1 CONNECT continued:

The final step to be completed by the participant is to accept the terms of the mobile app.

The image shows a mobile app interface for 'Workforce One Mobile Consent Terms'. The screen is divided into two columns of text. The left column contains introductory text and a list of points under 'I know:'. The right column contains a list of terms, a paragraph about declining, and a paragraph about selecting 'Decline'. At the bottom, there are two buttons: 'Accept and Continue' and 'Decline'. A callout box with a black border and white background points to the 'Accept and Continue' button. The callout box contains the text: 'Final Step: Click Accept and Continue'. The 'Accept and Continue' button is highlighted in blue.

5:09

Workforce One Mobile Consent Terms

By selecting the Accept and Continue button, I agree to use the Workforce One (WF1) Connect mobile app.

I allow my private information to be shared through the Workforce One (WF1) Connect mobile app with county welfare agencies, state agencies, and service providers who need my information to provide services to me or on my behalf and for case management.

I know that state and federal privacy laws protect my private information.

I know:

- Why I am being asked to share my information.
- I do not have to consent to the release of my information and it will not affect my benefits or services if I do not give my consent.
- That, generally, I must give my written consent to give out my information.
- If I do not consent, my information will not be released unless the law allows it.
- I may stop this consent with a written notice at any time, but this written notice will not affect information that has already been released.
- The person or entity who gets my information may be able to pass it on to others. If the person or entity passes my information on to others, the information may no longer be protected by this consent.

- I am responsible for any data charges from my cell phone service provider for using the Workforce One (WF1) Connect mobile application.
- The messages county welfare agencies, state agencies, and service providers send to me through the Workforce One (WF1) Connect mobile application may contain private information. I am responsible for protecting my private information on my mobile phone.
- If the Workforce One (WF1) Connect mobile application becomes unavailable, I know I must continue to comply with all applicable program requirements, including providing information when needed. Failing to do so may impact my eligibility for or receipt of benefits or services.

If I decline by selecting the Decline button, I will not be able to use the Workforce One (WF1) Connect mobile application to share my information with county welfare agencies, state agencies, and service providers.

Selecting the Decline button will not impact my eligibility for or receipt of benefits or services from county welfare agencies, state agencies, and service providers.

I have read, understood, and agree to the Consent Terms.

Accept and Continue Decline

Final Step:
Click **Accept and Continue**

NOTE: Pages 4-6 provide the steps that the participant needs to complete. Staff guidance continues on page 7.

ADD NEW CONVERSATION

You are able to message with the participant, once the participant has completed the steps on pages 4-6 and has accepted the terms of the **WF1 Connect** app.

Click on **Mobile User** to confirm that the participant has completed the required steps.

The screenshot shows the 'Mobile User Edit' page for Glinda D Goodwitch. The left sidebar has 'Mobile User' circled in red. The main content area shows user details and a 'Mobile Consent Status' of 'Agreed'. Two callout boxes provide additional information:

- Top Callout:** The **Mobile Consent Status** will list **Agreed** and the **Mobile Consent Date** will be listed also. (Points to the 'Agreed' status and '05/24/2021 05:09 PM' date.)
- Bottom Callout:** If the participant needs to have their **WF1 Connect** password reset prior to finalizing the steps on pages 4-6, the primary assigned staff in WF1 is the only person that may assist. **Click **Send Reset Password E-mail to Person**** and the participant will receive an email with instructions. If the participant has forgotten their password after finalizing the steps, they have a *Forgot Password* link on the **WF1 Connect** app. (Points to the 'Send Reset Password E-mail to Person' button.)

Mobile User Edit
Record ID 202015080
MAXIS Case 135627488

Glinda D Goodwitch
Birth Date 06/22/1999

*Mobile User Status: Active
Personal 1 E-mail: laurie.doheny@co.ramsey.mn.us
Username: laurie.doheny@co.ramsey.mn.us
User Locked: No
Last Login Date: 05/24/2021 05:57 PM
Mobile Consent Status: Agreed
Mobile Consent Date: 05/24/2021 05:09 PM

Search Other Record IDs for this Username

Comments

Spell Check

Save Send Reset Password E-mail to Person Cancel

ADD NEW CONVERSATION continued:

Click **Connect Messages** on the left navigation menu.

Messages to and from the participant are found under the **Connect Message Summary** panel. The information and ability to make changes to information displayed on the summary is based on user privileges.

General
At-A-Glance
Contact
Tickler
Connect Messages
Demographics

Connect Message Summary
Glinda D Goodwitch
Birth Date 06/22/1999

No conversations found.
Add New Conversation

Click Add New Conversation
The panel shown below will appear

Conversation Add
Glinda D Goodwitch
Birth Date 06/22/1999
Record ID 202015
MAXIS Case 135627

Hide Message Add

*To Goodwitch, Glinda D

*Conversation Category None Selected

*Conversation Subject

Mark as High Priority

*Privacy Level Not Private

Date Due

*Message

Spell Check

*Staff to view message/reply Doheny, Laurie - MFIP Seq 1 (Primary)
Select/Deselect

Select a File Browse..

Add File

Send Message Back to Message Summary

- Select or enter** the information for the **highlighted** items
- Mark as High Priority** - This checkbox allows the user to identify the message as high priority, which will be evident to the recipient when viewing the message.
- Privacy Level** - If the message is set to "Private", only the conversation creator, the current conversation recipients, and current primary, financial, or child care workers can view the message
- Staff to view message/reply** - allows you to select multiple staff that will have ability to view the messages. The dropdown will be populated with staff currently assigned to the recipient
- Select a File** - The field allows the user to select a file from their computer to add to the message. Once you have selected a file, you must **click Add File**
- Click Send Message**

ADD NEW CONVERSATION continued:

The example below shows the required items completed, including several staff added to the message.

Conversation Add

Glinda D Goodwitch Record ID 202015080
Birth Date 06/22/1999 MAXIS Case 135627488

▼ Hide Message Add

*To Goodwitch, Glinda D

*Conversation Category Document Needed ▼

*Conversation Subject School Transcript Needed

Mark as High Priority

*Privacy Level Not Private ▼

Date Due 05/30/2021

*Message

B

Hi Glinda,
Please send me a copy of your school transcript by 5/30/21.
Thanks!

Spell Check

Staff to view message/reply Doheny, Laurie - MFIP Seq 1 (Primary); Counselor1, Job; Counselor10, Job; Counselor11, Job; Counselor12, Job; Counselor2, Job; Counselor3, Job; Counselor4, Job; Counselor5, Job; Counselor6, Job; Counselor7, Job; Counselor8, Job; Counselor9, Job
[Select/Deselect](#)

Select a File

Now that all the required items have been entered, you may send the message or make any necessary changes

Click Send Message

CONNECT MESSAGE SUMMARY – Search, Read & Reply

The **Connect Message Summary** panel displays two panels; **Search Criteria** & **Conversation Results**.

- The **Search Results** panel allows you to search for specific conversations/messages. The default is All Values & Open.
- The **Conversation Results** panel provides a list of conversations/messages sent to the participant and indicates information about the conversation/message, including files received.

You may also start a new conversation by **clicking Add New Conversation** and following the steps on pages 8-9.

Connect Message Summary

Glinda D Goodwitch
Birth Date 06/22/1999

Record ID 202015080
MAXIS Case 135627488

Search Criteria

Staff: All Values
Conversation Category: All Values
Message Status: Open

Sent Date: [] To []
Received Date: [] To []

Subject: []

Run Search

Conversation Results

Show 25 100 200 500
Displaying 1 to 1 of 1

Conver Category: Subject	Initial Sent Date/Time	Last Msg Read by Prsn	Last Msg Recvd from Prsn	Latest Msg Status	Last Staff to Reply	File Rcd	Staff in Conver	Action
Doc Needed : School Transcript Needed	05/24/21 05:05 PM by Laurie J Doheny	No	05/24/21 05:16 PM	Read by some	Laurie J Doheny at 05/24/21 05:37 PM	Yes	Doheny, Laurie Counselor1, Job Counselor10, Job Counselor11, Job Counselor12, Job	Read/Reply Close Remove Me

New Search Refine Search Add New Conversation

You may search for specific messages by selecting items from the boxes or entering dates, then **Click Run Search**

Any of the columns that are **blue** may be sorted by clicking on the header.

The column **highlighted** indicates that the sort is by that column.

The **Action** column indicates what you are able to do within the conversation

Read/Reply - This allows you to:

- Read the complete conversation
- Continue the conversation of this specific conversation
- Manage files in the conversation
- Add Case Note of the conversation
- Close the conversation
- Send Tickler to staff

Close - This allows you to end the conversation

Remove Me - This allows you to remove yourself from the conversation

CONNECT MESSAGE SUMMARY – Search, Read & Reply continued:

The **Conversation Reply** panel appears after clicking the **Read/Reply** action on the **Connect Message Summary** panel, shown on the previous page. This panel includes the **Conversation History** and **Message Add** panels for the specific message.

Conversation Reply

Glinda D Goodwitch
Birth Date 06/22/1999

Hide **Conversation History**

Message	Sent Date	Sent By	Staff/Person in Conversation	File(s) Sent	File(s) Rcvd
Thanks for the reminder.	05/24/21 05:16 PM	Goodwitch, Glinda D	Counselor1, Job (Unread) Counselor10, Job (Unread) Counselor9, Job (Unread) Doheny, Laurie (Read)		Yes
Hi Glinda, Please send me a copy of your school transcript by 5/30/21. Thanks!	05/24/21 05:05 PM	Doheny, Laurie	Counselor1, Job (Unread) Counselor10, Job (Unread) Counselor9, Job (Unread) Goodwitch, Glinda D (Read)		No

No Case Note has been added for this Conversation.

Manage Files Add Case Note for Conversation Close Conversation

Back to Message Summary Send Tickler to Staff

Hide **Message Add**

*To Goodwitch, Glinda D
*Conversation Category Document Needed
Conversation Subject School Transcript Needed
Mark as High Priority Yes
Privacy Level Not Private
Date Due 05/30/2021

*Message

Spell Check

Staff to view message/reply Doheny, Laurie - MFIP Seq 1 (Primary); Counselor1, Job; Counselor10, Job; Counselor11, Job; Counselor12, Job; Counselor2, Job; Counselor3, Job; Counselor4, Job; Counselor5, Job; Counselor6, Job; Counselor7, Job; Counselor8, Job; Counselor9, Job
[Select/Deselect](#)

Select a File Browse...

Add File

Send Message Back to Message Summary

The **Conversation History** detail appears at the top, you must scroll down to locate the **Message Add** section, or **Click** the **Conversation History** header to hide the detail

The **Message Add** panel allows you to reply to an existing message

Enter or **update** the existing information, as outlined on pages 8-9, then **click** **Send Message**

MANAGE FILES/DOCUMENTS

The feature to **Manage Files** appears after clicking the **Read/Reply** action on the **Connect Message Summary** panel, shown on page 10.

Conversation Reply

Glinda D Goodwitch
Birth Date 06/22/1999

Hide Conversation History

Message	Sent Date	Sent By	Staff/Person in Conversation	File(s) Sent	File(s) Rcvd
Thanks for the reminder.	05/24/21 05:16 PM	Goodwitch, Glinda D	Counselor1, Job (Unread) Counselor10, Job (Unread) Counselor9, Job (Unread) Doheny, Laurie (Read)		Yes
Hi Glinda, Please send me a copy of your school transcript by 5/30/21. Thanks!	05/24/21 05:05 PM	Doheny, Laurie	Counselor1, Job (Unread) Counselor10, Job (Unread) Counselor9, Job (Unread) Goodwitch, Glinda D (Read)		No

No Case Note has been added for this Conversation.

Manage Files Add Case Note for Conversation Close Conversation

Back to Message Summary Send Tickler to Staff

Hide Message Add

*To: Goodwitch, Glinda D

*Conversation Category: Document Needed

Conversation Subject: School Transcript Needed

Mark as High Priority: Yes

Privacy Level: Not Private

Date Due: 05/30/2021

*Message

Spell Check

Staff to view message/reply: Doheny, Laurie - MFIP Seq 1 (Primary); Counselor1, Job; Counselor10, Job; Counselor11, Job; Counselor12, Job; Counselor2, Job; Counselor3, Job; Counselor4, Job; Counselor5, Job; Counselor6, Job; Counselor7, Job; Counselor8, Job; Counselor9, Job

Select/Deselect

Select a File: Browse...

Add File

Send Message Back to Message Summary

Several options are available in the **Conversation History** panel, which includes **Manage Files**

Click Manage Files

- To view the documents you received from the participant
- To save the document to EDS

MANAGE FILES/DOCUMENTS continued:

The **Message Manager Files** panel allows you to view and save the file/document you received from the participant.

Message Manager Files

Glinda D Goodwitch
Birth Date 06/22/1999

Record ID 202015080
MAXIS Case 135627488

Conversation Category: Subject Document Needed: School Transcript Needed

Select the File Name to save a copy on your local drive.

Files Received in Conversation

Select	File Name	Format	Received Date ^
<input checked="" type="checkbox"/>	a560bc35-d1fe-48ee-aa4d-2ebd2dbb0206.jpg		5/24/2021 5:16:33 PM

Documents in Workforce One EDS associated with this Conversation
No EDS documents for this conversation.

Clicking the file allows you to open the file or save the document to your device. Otherwise you may save to EDS.

Check the **box** next to the file
Note: If there are multiple files listed, you may check more than one box to save to the same EDS Document Type.
Or you may save other files to EDS separately.

Click **Save to EDS Document** and the panel below will appear

Multiple Document Add

Glinda D Goodwitch
Birth Date 06/22/1999

*Program Seq MFIP Seq 1 (Enrolled)
*Agency Ramsey County Workforce Solutions
*Staff Associated

Click **Next** and the panel on the next page will appear

MANAGE FILES/DOCUMENTS continued:

The following panel appears after clicking **Next**, shown on the previous page.

Multiple Document Add

Glinda D Goodwitch Record ID 202015080
 Birth Date 06/22/1999 MAXIS Case 135627488

*Program Seq MFIP Seq 1 (Enrolled)
 *Agency Ramsey County Workforce Solutions
 *Staff Associated Doheny, Laurie J
 Selected File a560bc35-d1fe-48ee-aa4d-2ebd2dbb0206.jpg
 *EDS Document Type Education and Training

EDS Document Type – select the appropriate item
 Click **Add to List** and the panel below will appear

Multiple Document Add

Glinda D Goodwitch Record ID 202015080
 Birth Date 06/22/1999 MAXIS Case 135627488

*Program Seq MFIP Seq 1 (Enrolled)
 *Agency Ramsey County Workforce Solutions
 *Staff Associated Doheny, Laurie J
 Selected File a560bc35-d1fe-48ee-aa4d-2ebd2dbb0206.jpg
 *EDS Document Type None Selected

The following files have not been saved until the 'Upload' button has been clicked. Use the 'Edit' action if more tags need to be added to a document prior to uploading.

File Name	EDS Document Type	*Document Name	User-Defined Document Name	*Privacy Level	Action
a560bc35-d1fe-48ee-aa4d-2ebd2dbb0206.jpg	MFIP - Education and Training	Grades, Transcript	<input type="text"/>	Only Staff's Agency	Delete Edit

If there are multiple files, they would be listed here, allowing you to check the box to save to another EDS Document Type.
 Note the message listed here.
 Click **Upload** to complete the process

MANAGE FILES/DOCUMENTS continued:

The **Message Manager Files** panel below will appear after clicking **Upload**, as shown on the previous page.

Document saved.

Message Manage Files

Glinda D Goodwitch
Birth Date 06/22/1999

Record ID 202015080
MAXIS Case 135627488

Conversation Category: Subject Document Needed: School Transcript Needed

Select the File Name to save a copy on your local drive.

Files Received in Conversation

Select	File Name	Format	Received Date
<input type="checkbox"/>	a560bc35-d1fe-48ee-aa4d-2ebd2dbb0206.jpg		5/24/2021 5:16:33 PM

Save to EDS Document

Documents in Workforce One EDS associated with this Conversation

Document Name: User Defined Document Name	EDS Document Type	Uploaded By	Uploaded Date	Format
Grades, Transcript	MFIP - Education and Training	Doheny, Laurie	05/24/2021 05:33:31 PM	

The document has now been saved to EDS.

Document Summary

Glinda D Goodwitch
Birth Date 06/22/1999

Record ID 202015080
MAXIS Case 135627488

Show Filter Criteria

Hide MFIP Seq 1 - Enrolled

Document Name: User Defined Document Name	EDS Document Type	Uploaded Date	Document Date: Received Date	Format	Cmt Added	Action
Grades, Transcript	MFIP - Education and Training	05/24/2021 05:33:31 PM			No	

Add MFIP Document

Document Summary

The document now appears in the **EDS Document Summary** panel also

ADD CASE NOTE FOR CONVERSATION

The feature to **Add Case Note for Conversation** appears after clicking the **Read/Reply** action on the **Connect Message Summary** panel, shown on page 10.

Conversation Reply

Glinda D Goodwitch
Birth Date 06/22/1999

Hide Conversation History

Message	Sent Date	Sent By	Staff/Person in Conversation	File(s) Sent	File(s) Rcvd
Thanks for the reminder.	05/24/21 05:16 PM	Goodwitch, Glinda D	Counselor1, Job (Unread) Counselor10, Job (Unread) Counselor9, Job (Unread) Doheny, Laurie (Read)		Yes
Hi Glinda, Please send me a copy of your school transcript by 5/30/21. Thanks!	05/24/21 05:05 PM	Doheny, Laurie	Counselor1, Job (Unread) Counselor10, Job (Unread) Counselor9, Job (Unread) Goodwitch, Glinda D (Read)		No

No Case Note has been added for this Conversation.

Manage Files Add Case Note for Conversation Close Conversation

Back to Message Summary Send Tickler to Staff

Several options are available in the **Conversation History** panel, which includes **Add Case Note for Conversation**

This feature allows you to add the complete conversation from **WF1 Connect** to a case note, rather than using copy/paste from your email or typing a detailed case note

Click **Add Case Note for Conversation** and the panel below will appear

Hide Add Casenote

Category: None Selected
Select/Deselect

Case Note

Laurie J Doheny 05/24/2021 05:37
Message: I received your transcript. Thanks for your quick response.

Glinda D Goodwitch 05/24/2021 05:16
Message: Thanks for the reminder.

Laurie J Doheny 05/24/2021 05:05

Spell Check

Save Case Note Cancel Case Note

Category – select the appropriate item(s)

Case Note - The conversation has been auto-entered in the case note detail

Click **Save Case Note**

ADD CASE NOTE FOR CONVERSATION continued:

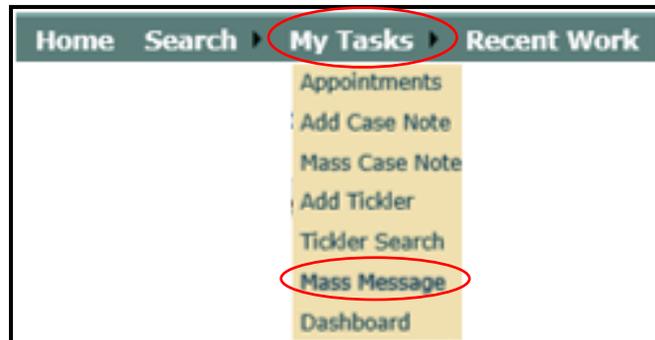
The **Case Note View** panel displays the complete conversation from **WF1 Connect**.

General	Case Note View	
At-A-Glance	Glinda D Goodwitch	
Contact	Birth Date 06/22/1999	
Tickler	Event Date	05/24/2021
Connect Messages	Note Viewable By	All Staff in Servicing Agency
Demographics	Program	MFIP
Mobile User	Agency	Ramsey County Workforce Solutions
Work Preferences	Staff Assigned	Doheny, Laurie J
MN Works Resume	Category	Correspondence; Training
Case Note	Contact Method	
Add Case Note	Contact Type	
Case Note Quick	Status	Open
Case Note Search	Mass Case Note	No
Cases	Subject	School Transcript Needed
Program/New App	Note	
Eligibility/Enrollment	Laurie J Doheny 05/24/2021 05:37	
Activity	Message: I received your transcript. Thanks for your quick response.	
Plan		
Credential	Glinda D Goodwitch 05/24/2021 05:16	
Youth Performance	Message: Thanks for the reminder.	
Participation Hours		
Exit	Laurie J Doheny 05/24/2021 05:05	
Follow-Up	Message: Hi Glinda,	
Case Assignment	Please send me a copy of your school transcript by 5/30/21.	
Service Model	Thanks!	
EDS	<input type="button" value="Edit"/>	
Add Document	<input type="button" value="Back to Case Note Search"/>	
Add Multiple Documents	Entry Date	05/24/2021 05:55 PM By Laurie J Doheny
	Last Updated Date	By

MASS MESSAGE ADD continued:

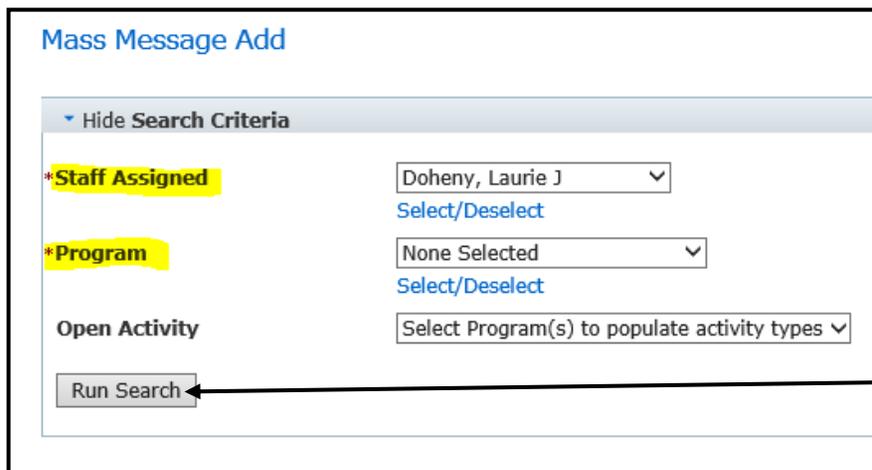
This feature allows the user to send the same **WF1 Connect** message to multiple participants at the same time.

NOTE: **Mass Message Add** should be used for sharing job club flyers, webinar sessions, workshop info, etc.
No participant-specific information should be included in the message, i.e. no personal information (names, addresses, etc)



Click **My Tasks** from the top navigation

Click **Mass Message** and the panel below will appear



A screenshot of the 'Mass Message Add' form. The form has a title 'Mass Message Add' and a 'Hide Search Criteria' dropdown. Below this, there are three fields: '*Staff Assigned' with a dropdown menu showing 'Doheny, Laurie J' and a 'Select/Deselect' link; '*Program' with a dropdown menu showing 'None Selected' and a 'Select/Deselect' link; and 'Open Activity' with a dropdown menu showing 'Select Program(s) to populate activity types'. At the bottom left, there is a 'Run Search' button with an arrow pointing to it from the right.

The items **highlighted** are required

Staff Assigned - Select name(s)*

*User's name auto-populates

Program - Select program(s)

Open Activity - Select one or multiple (optional)

Click **Run Search** and the panel on the next page will appear

MASS MESSAGE ADD continued:

The panel below will appear after clicking **Run Search**, as shown on the previous page.

The screenshot shows a web interface for adding a mass message. At the top, there's a 'Hide Search Results' dropdown and a 'Show' section with radio buttons for 25, 100, 200, and 500 (500 is selected). Below this is a table with two columns: 'Name' and 'Record ID'. The first row is highlighted in yellow and contains 'Gale, Henry A' and '100000962'. The second row is greyed out and contains 'Goodwitch, Glinda D' and '202015080'. Below the table are buttons for 'Select All', 'Deselect All', 'New Search', and 'Refine Search'. The 'Select All' button is highlighted with a red arrow. Below the table are several form fields: '*Conversation Category' (dropdown menu with 'None Selected'), '*Conversation Subject' (text input), '*Mark as High Priority' (checkbox), '*Privacy Level' (dropdown menu with 'Not Private'), and 'Date Due' (text input with a calendar icon). Below these is a large text area for the '*Message'. At the bottom, there are buttons for 'Spell Check', 'Message Sent by' (Laurie J Doheny), 'Select a File' (with a 'Browse...' button), 'Add File', 'Send Message', and 'Cancel'. The 'Send Message' button is highlighted with a red arrow.

Select	Name	Record ID
<input checked="" type="checkbox"/>	Gale, Henry A	100000962
<input type="checkbox"/>	Goodwitch, Glinda D	202015080

The items **highlighted** are required

Select – Check the box next to the participants to whom you want to send the message or
Click **Select All** to include all the participants listed

Mark as High Priority - This checkbox allows the user to identify the message as high priority, which will be evident to the recipient(s) when viewing the message.

Privacy Level - If the message is set to "Private", only the conversation creator, the current conversation recipients, and current primary, financial, or child care workers can view the message

Select a File - The field allows the user to select a file from their computer to add to the message. Once you have selected a file, you must **click Add File**

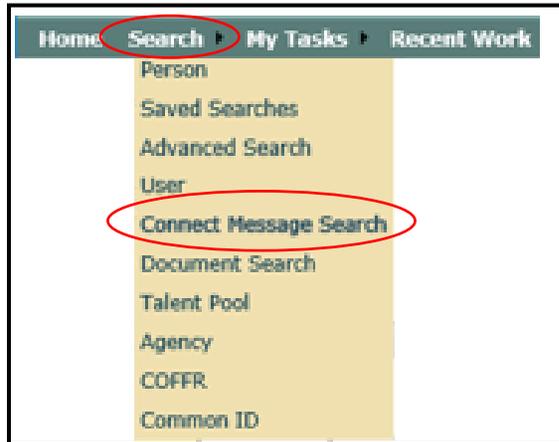
Click Send Message*

*In order to send a message, either the Message field needs to be populated or a file needs to have been added to the message.

The message has now been sent to those selected.

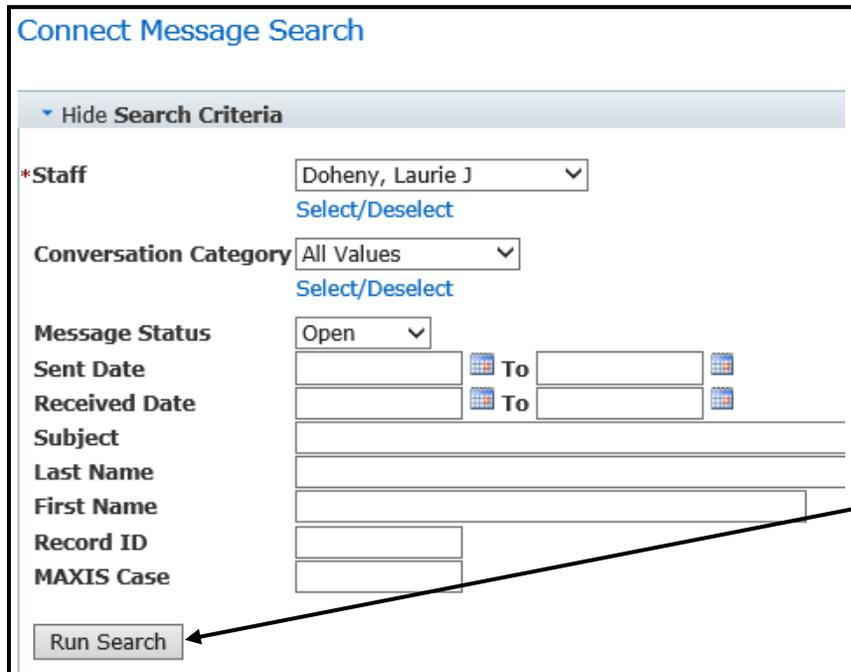
SEARCH FOR CONNECT MESSAGE

This feature allows you to search for **WF1 connect** messages and conversations using a number of criteria; see the conversation status; read/reply, or remove yourself from a conversation.



Click **Search** from the top navigation

Click **Connect Message Search** and the panel below will appear



The 'Connect Message Search' panel is shown. It has a title 'Connect Message Search' and a 'Hide Search Criteria' button. The search criteria include: '*Staff' with a dropdown menu showing 'Doheny, Laurie J' and a 'Select/Deselect' link; 'Conversation Category' with a dropdown menu showing 'All Values' and a 'Select/Deselect' link; 'Message Status' with a dropdown menu showing 'Open'; 'Sent Date' and 'Received Date' with date pickers and 'To' fields; 'Subject', 'Last Name', 'First Name', 'Record ID', and 'MAXIS Case' with text input fields. A 'Run Search' button is at the bottom left.

Staff Assigned - Select name(s)*

*User's name auto-populates

Enter info and/or **select values** from the items listed to receive results for specific messages

Click **Run Search** and the panel on the next page will appear

SEARCH FOR CONNECT MESSAGE continued:

The panel below will appear after clicking **Run Search**, as shown on the previous page.

Connect Message Search

▼ Hide Search Criteria

*Staff [Select/Deselect](#)

Conversation Category [Select/Deselect](#)

Message Status

Sent Date To

Received Date To

Subject

Last Name

First Name

Record ID

MAXIS Case

▼ Hide Search Results

Show 25 100 200 500
Displaying 1 to 2 of 2

Person Name	Record ID	MAXIS Case	Conversation Category: Subject	Last Message Received from Person	Latest Message Status	Last Staff to Reply	Staff in Conver	Action
Goodwitch, Glinda D	202015080	135627488	Event Notif : Job Club			Laurie J Doheny at 05/26/2021 08:03 PM	Doheny, Laurie	Read/Reply
Gale, Henry A	100000962	10617170	Event Notif : Job Club			Laurie J Doheny at 05/26/2021 08:03 PM	Doheny, Laurie	Read/Reply

The selected **Search Criteria, Staff & Conversation Category**, resulted in 2 records fitting the criteria

The **Action** column lists what you may do with the message

NOTE: The **Actions** listed depend on the type of message

MESSAGE AUTO-SENT FROM SESSIONS & APPOINTMENTS – Sessions

When you register a participant/**WF1 Connect** mobile application user for a Session, that participant will automatically receive a **WF1 Connect** message notifying them of the session registration. In addition to the original notification, a **WF1 Connect** reminder message will be auto-sent 3 days prior to the scheduled session.

There are 2 ways to register participants:

1. From the **top** navigation - allows you to register one or many participants for a Session



From the **top** navigation:

Click **Manage Program**, then
Click **Sessions**

The **Search Criteria** panel will appear. Enter the criteria and **Click** **Run Search** to receive session results. Under the Action column, **Click** **Register** for the appropriate session.

2. From the **left** navigation, within a Person Record - allows you to register the one participant



From the **left** navigation, within a Person Record:

Click **Session**, then
Click **Go to Session Search**

The **Search Criteria** panel will appear. Expand the **Search Criteria**, if needed. Enter the criteria and **Click** **Run Search** to receive session results. Under the Action column, **Click** **Register** for the appropriate session.

MESSAGE AUTO-SENT FROM SESSIONS & APPOINTMENTS – Sessions continued:

Once you have completed the registration process, you will receive notification that the registration has been saved and a **WF1 Connect** message has been sent.

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

✔ Registration saved. Connect message(s) sent.

Session Registration Management

Session Name resume workshop (English)
Agency Ramsey County Workforce Solutions
Held At Virtual
Date 06/18/2021
Time 10:00 AM - 11:00 AM
Mandatory Yes

Capacity 20
Registered 2
Available 18

Displaying 1 to 2 of 2

Select	Name	Status	Record ID	MAXIS Case	Last Notice Date	Email
<input type="checkbox"/>	Gale, Henry A	Registered	100000962	10617170		henry.gale@gmail.com
<input type="checkbox"/>	Goodwitch, Glinda D	Registered	202015080	135627488		glinda.d.goodwitch@gmail.com

Message appears after a session registration, from the **top** navigation, has been completed

The participants that you selected for the Session are listed as **Registered**

General

At-A-Glance
Contact
Tickler
Connect Messages
Demographics
Mobile User
Work Preferences
MN Works Resume

Case Note
Add Case Note
Case Note Quick
Case Note Search

✔ Registration saved. Connect message sent.

Person Session Summary

Glinda D Goodwitch
Birth Date 06/22/1999

Record ID 202015080
MAXIS Case 135627488

Displaying 1 to 2 of 2

Session Name	Date/Time	Held At	Status	Last Notice Date	Action
resume workshop (English)	06/18/2021 10:00 - 11:00	WF Solutions: Virtual	Registered		Unregister
power plus (English)	07/07/2021 10:00 - 11:00	WF Solutions: Virtual	Registered		Unregister

Message appears after a session registration, from the **left** navigation within a Person Record, has been completed

The participant is listed as **Registered**

MESSAGE AUTO-SENT FROM SESSIONS & APPOINTMENTS – Appointments

When you schedule appointments for a participant/**WF1 Connect** mobile application user, that participant will automatically receive a **WF1 Connect** message notifying them of the appointment. In addition to the original notification, a **WF1 Connect** reminder message will be auto-sent 3 days prior to the scheduled appointment.

General

- At-A-Glance
- Contact
- Tickler
- Connect Messages
- Demographics
- Mobile User
- Work Preferences
- MN Works Resume

Service

- RETAIN Service
- Support Service

Assessment

- DHS Assessment
- Reading/Math Test

Form/Letter/Schedule

- Appointment**

Appointment Summary

Glinda D Goodwitch
Birth Date 06/22/1999

Record ID 202015080
MAXIS Case 135627488

No results found.

Add New Appointment

From the **left** navigation, within a Person Record:

Click **Appointments**
Click **Add New Appointment**

The **Appointment Details** panel will appear. Complete the details and Click **Save**

Once you have scheduled an appointment, you will receive notification that the appointment has been saved and a **WF1 Connect** message has been sent.

Appointment saved. Connect message sent.

Appointment Summary

Glinda D Goodwitch
Birth Date 06/22/1999

Record ID 202015080
MAXIS Case 135627488

Show 25 100 200 500
Displaying 1 to 1 of 1

Select	Appointment Name	Date/Time	Appointment With	Status	Last Notice Date	Action
<input type="checkbox"/>	Appointment to Discuss - school plans (Mandatory)	06/01/2021 09:00 - 09:30	Laurie J Doheny WF Solutions	Scheduled		Edit

Add New Appointment View/Print Appointment(s) Selected

Message appears after an appointment has been saved & that a WF1 Connect message has been sent

The participant is listed as **Scheduled**

MESSAGE AUTO-SENT FROM SESSIONS & APPOINTMENTS – WF1 Connect Message Details

General

- At-A-Glance
- Contact
- Tickler
- Connect Messages**
- Demographics
- Mobile User
- Work Preferences
- MN Works Resume

Case Note

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

Cases

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

Connect Message Summary

Glinda D Goodwitch Record ID 202015080
 Birth Date 06/22/1999 MAXIS Case 135627488

▼ Show Search Criteria

▼ Hide Conversation Results

Show 25 100 200 500
 Displaying 1 to 5 of 5

Conver Category: Subject	Initial Sent Date/ Time	Last Msg Read by Prsn	Last Msg Recvd from Prsn	Latest Msg Status	Last Staff to Reply	File Rcd	Staff in Conver	Action
Appt : Reminder for Wednesday, July 7, 2021, 10:00 AM - 11:00 AM	05/27/21 11:38 AM by Laurie J Doheny	No			Laurie J Doheny at 05/27/21 11:38 AM	No	Doheny, Laurie	Read/Reply Delete
Appt : Reminder for Friday, June 18, 2021, 10:00 AM - 11:00 AM	05/27/21 11:32 AM by Laurie J Doheny	No			Laurie J Doheny at 05/27/21 11:32 AM	No	Doheny, Laurie	Read/Reply Delete

The **Connect Message Summary** panel displays the Sessions and Appointments that have been scheduled

1:19

Messages

Select a subject to view or to send a reply, or select the new messages icon to start a new conversation.

- Reminder for Wednesday, July 7, 2021, 10:00 AM - 11:00 AM
 Due Date: 07/07/2021
 From: Laurie Doheny 05/27/2021 11:38 AM
- ! Reminder for Friday, June 18, 2021, 10:00 AM - 11:00 AM
 Due Date: 06/18/2021
 From: Laurie Doheny 05/27/2021 11:32 AM
- ! Reminder for Tuesday, June 1, 2021, 9:00 AM - 9:30 AM
 Due Date: 06/01/2021
 From: Laurie Doheny 05/27/2021 10:08 AM
- Job Club
 From: Laurie Doheny 05/26/2021 08:03 PM
- ! School Transcript Needed
 Due Date: 05/30/2021
 From: Laurie Doheny 05/24/2021 05:37 PM

Messages Resources Contact Settings

This is an example of the messages that the participant will see when they access their **WF1 Connect** app