

## DWP/MFIP ES POLICY

**Date Revised:** October 8, 2024

**To:** MFIP & DWP Employment Services Providers

**From:** Workforce Solutions Integrated Planning Manager

**Subject:** Electronic Document Storage (EDS) Guidance

**Purpose:** To update the EDS Implementation policy maintaining relevant guiding information

### **Background:**

The State of Minnesota launched Workforce One (WF1) Electronic Document Storage (EDS) effective June 2017. The update to WF1 allowed users to incorporate supporting documentation into the system. Workforce Solutions implemented EDS for all new MFIP cases effective January 2, 2019. DHS made it a requirement for documents to be updated into EDS system effective January 1, 2020.

### **GUIDANCE:**

#### **A. Existing Cases**

Any documentation that supports current ES activities must be uploaded into EDS. These documents include but are not limited to: Assessments, Signed copies of Employment Plan, Monthly Activity logs/attendance, Employment Verification, School Verification, Medical Opinion Form, Child Care Transmittal, Referral for upcoming support(s) and FSS/Extension checklist(s), etc.

[See 24.12 What is needed in ES case file.](#)

#### **B. Re-opened MFIP cases**

When a case is closed and re-opens under a different sequence, a new EDS file is created under the current MFIP sequence. If documentation (i.e. employment verification, medical opinion form, etc.) in former MFIP sequence on EDS is still current they can be copied into the new sequence as follows:

1. Open the participants **EDS document summary** on WF1.
2. Locate the desired document to be copied to the new MFIP sequence.
3. Select **copy** on the right-hand side of your screen under **action**.
4. Choose appropriate **target program sequence, EDS document type & document name**.
5. Select **copy** to complete the copying process.

A summary of why this document was copied can be included prior to completing this process. (i.e., MFIP Seq 2 open 10/5/24. EVF dated 8/25/24 was copied to verify current employment status).

#### **C. Job Search, Social Service & Education Logs**

For auditing purposes, these logs & corresponding verifications are to be scanned individually to ensure that monitors are able to find all documents with ease. Do not group & scan multiple logs. The document date in EDS should reflect the date received.

**D. Document/File Retention**

- Paper files containing documentation up to 12/31/18 must be retained onsite. Upon case closure, close the record in WF1. Closure of paper files are to follow the current existing file retention policy; Cases open, pending, or otherwise active on or after 1/1/2014:
  - ✓ Destroy documents other than exception documents\* 10 years after received.
  - ✓ Destroy all documents 10 years after case (last program) closure.
 Reference: [DHS Bulletin Number 22-85-02 Retention Schedule](#) - ID 13. Public Assistance Client Files.
  
- Workforce One will purge records 10 years after exit the program sequences including case notes and person records if there is no other enrollment. The “records to be purged” report can be accessed in Workforce One.

**E. Scanning & Routing**

Document scanning & routing will differ between each agency due to scanner type and capacity. All documents are individually uploaded into WF1 EDS as guided in the [External Provider Resources - Policies & Manuals](#) → WF1 User Guides → EDS MFIP. Scanning & routing guidance is as follows:

1. Direct scanner to send electronic document image to your email or desktop.
2. Save attachment/document to computer prior to uploading to EDS. It is recommended to create a new folder titled EDS to store and locate scanned documents.
3. Save document with the participants name & a brief description.
4. Open case record in WF1.
5. Locate EDS on left side menu – Select Add Document.
6. Select current Program Sequence.
7. Choose EDS Document Type from list of options.
8. Select file to be uploaded. Locate scanned document by choosing “browse” and navigate to saved document.
9. Document will now appear next to “Select a File” on WF1 EDS.
10. Select next and follow directions provided by EDS User Guide.

## F. Frequently Asked Questions

- **Expectations/How Often:** It is recommended that each site develop a schedule to ensure that employment counselors are allowing time to upload documentation at least one to two times per week. Documents are to be uploaded into EDS within 10 business days of receipt.
- **Original Document Retention:** Original documentation is retained for 90 days after entry into EDS. After 90 days, documentation can be shredded.
- **Document Date:** All documents in EDS are to reflect the date the document was received.
- **Transportation Assistance/Support Services:** Documentation defining the type of assistance received (gas card, bus card, gift card) and the participants signature verifying receipt is to be indexed into EDS within 10 days of issue date. Do not group multiple support service documents.
- **Financial/Child Care Documents:** Do not index documents in EDS that are not Employment Service documents. If employment counselors are sending childcare applications, household report forms, request for MFIP case closure, request for child under one exemption, paystubs, etc. it is recommended that they case note that the document was sent including date/time. Keep documents that were sent in the same EDS file as indexed EDS documents being held for 90 days. Employment counselors are encouraged to set WF1 ticklers to verify in MAXIS/MEC2 that document(s) were received and processed by Financial/Child Care.

## G. Resources

- **WFS EDS User Guide:** Step by step instructions to assist EDS users in the process of uploading & indexing MFIP ES documentation. the [External Provider Resources - Policies & Manuals](#) → WF1 User Guides EDS MFIP.
- **WFS MFIP to EDS Configuration Summary:** For consistency of EDS document storage this document aligns Ramsey County & DHS Forms | Document Types | Document Names | User Defined Document Names. [External Provider Resources - Policies & Manuals](#) → MFIP to EDS Configuration Summary.
- **WF1 EDS User Guide:** This user guide identifies how to use EDS in WF1. Located in WF1 System → Resources Tab → User How-To Guides → EDS User Guide.
- **WF1 EDS Configuration Summary:** This list in WF1 identifies the EDS Document Type and Name. Located in WF1 System → References Tab → EDS Configuration.