

Workforce One

Electronic Document Storage (EDS) System - MFIP
November 2018



All program documents must be uploaded to WF1's EDS system by the assigned Employment Counselor, program Supervisor, Case Aide or Data Specialist.

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Add Document

Documents must be saved to your computer prior to uploading to WF1's EDS.

It is recommended to save the document with the participant's name and brief description for ease in locating correct document. Document Name example: Referral, Diane Assessment

Refer to page 9 for the list of Document Types and the associated Document Names.

Click the **Add Document** link from the left navigation menu and the panel shown below will appear.

General

- At-A-Glance
- Contact
- Tickler
- Demographics
- Work Preference
- MN Works Resur

Case Note

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

Cases

- Program/New App
- Eligibility/Enrollment
- Activity
- TAA
- Plan
- Credential
- Reporting Collection
- Youth Performance
- Participation Hours
- Exit
- Follow-Up
- Case Assignment
- Service Model

EDS

- Add Document**

Document Add

*Program Seq: MFIP Seq 1 (Enrolled)

*EDS Document Type: None Selected

*Select a File: Browse...

Next Cancel

Program Seq: Select MFIP

EDS Document Type: Select appropriate item

EDS Document Types for MFIP are:

- MFIP - Appeals and Complaints
- MFIP - Assessments
- MFIP - Consent, Release of Information
- MFIP - Correspondence
- MFIP - Court and Legal
- MFIP - Education and Training
- MFIP - Employment
- MFIP - Financial - Assets, Income
- MFIP - Financial - Authorizations, Purchase Orders, Payments
- MFIP - Financial - Bills, Expenses
- MFIP - Financial - Other
- MFIP - Financial - Taxes
- MFIP - Identity
- MFIP - Medical
- MFIP - Other
- MFIP - Program-Specific
- MFIP - Social Security
- MFIP - Veterans

Select a File: Click **Browse**, locate correct document that was saved previously

Click Next

Add Document continued:

All items marked with an asterisk are required when adding documents.
The items highlighted below are optional, but should be used when applicable.

Click **Upload** once data has been entered.

Selected File: Confirm that the correct file is listed before proceeding

Staff Associated: Select your name

Document Name: Select the appropriate item; however, this may auto-populate depending on the Document Type selected

User Defined Document Name: Enter a more detailed name if the pre-defined Document Name isn't adequate

Folder: This may auto-fill depending on the Document Name that is selected; otherwise, select appropriate item

Privacy Level* = Select **All Staff in Only Servicing Agency**

*This item will default to Private when selecting Medical as the Document Type

Received Date, Document Date, Signed Date & Expiration Date = Entering the appropriate date for any of these will allow a search to be completed by the date entered

Reason for Collecting: Selectable options are:

- Name Verification
- Other
- Verification of Placement in Education or Training
- Verification of Placement in Employment
- Verification of Progress Toward Goals
- Verification of Public Assistance (TANF, SNAP, SSI)

Click **Upload**

Document Summary & View

The **Document Summary** panel lists the documents that have been uploaded to each program sequence.

Click the **Document Summary** link from the left navigation menu and the panel shown below will appear allowing you to view the documents.

Document Name: User Defined Document Name	EDS Document Type	Uploaded Date	Document Date: Received Date	Format	Cmt Added	Action
Request for Medical Opinion (Private)	MFIP - Medical	10/16/2018 03:00:26 PM	10/05/2018 10/05/2018	Word Document	No	Tags and Comments Copy Move Delete
Assessment This was entered under User Defined Document Name	MFIP - Assessments	10/16/2018 01:26:52 PM	10/01/2018 10/02/2018	Word Document	No	Tags and Comments Copy Move Delete

Document Name = the name selected, or auto-entered, when adding the document.

Click the Document Name link to view the document.

User Defined Document Name = the name entered when adding the document

EDS Document Type = the name selected when adding the document

Document Date & Received Date = the dates entered when adding the document

Action: click an item to complete the action



Click Open to view the document.

Edit Document - Tags and Comments

Users with the appropriate privileges are able to **Edit** document tags and/or add comments to documents.

Click the **Document Summary** link from the left navigation menu and the panel shown below will appear.

EDS	Hide MFIP Seq 1 - Enrolled					
Add Document	Document Name: User Defined Document Name	EDS Document Type	Uploaded Date	Document Date: Received Date	Format	Cmt Added
Document Summary	Request for Medical Opinion (Private)	MFIP - Medical	10/16/2018 03:00:26 PM	10/05/2018 10/05/2018		No
DHS-IX						Tags and Comments Copy Move Delete
MAXIS						
Incoming Status Update						
Referral						
Service						
Support Service						

Action: Select **Tags and Comments** to access the **Document Tags and Comments** panel

Click **Edit Tags** to update, add or change items in the document

Document Tags and Comments

Diane Referral
Birth Date 06/22/1980

Program Seq MFIP Seq 1 (Enrolled)
EDS Document Type MFIP - Medical
Agency Ramsey County Workforce Solutions
Staff Associated Laurie J Doheny
Document Name Request for Medical Opinion (DHS-2114)
User Defined Document Name
Folder
Privacy Level Private
Can Share with Person
Received Date 10/05/2018
Document Date 10/05/2018
Signed Date 10/05/2018
Expiration Date
Reason for Collecting
User Defined Date 1
User Defined Date 2
User Defined Tag 1
User Defined Tag 2
Uploaded by Laurie J Doheny

Copy Document

Users with the appropriate privileges may **Copy** documents:

- From one program sequence to another program sequence within the same person record, AND
- From one person's record to another person's record if they have matching MAXIS Case Numbers, for example, a 2nd parent on the same case.

Click the **Document Summary** link from the left navigation menu and the panel shown below will appear.

EDS							
Add Document							
Document Summary							
DHS-1X							
MAXIS							
Incoming Status Update							
Referral							
Service							
▼ Hide MFIP Seq 1 - Enrolled							
Document Name: User Defined Document Name	EDS Document Type	Uploaded Date	Document Date: Received Date	Format	Cmt Added	Action	
Landlord Statement	MFIP - Other	10/17/2018 09:23:50 AM	10/08/2018 10/08/2018		No	Tags and Comments Copy Move Delete	

Action: Select **Copy** to access the **Document Copy** panel

Document Copy

Diane Referral Record ID 10000911
 Birth Date 06/22/1980 MAXIS Case 10617174

Source Person Name Diane Referral
 Source Program Seq MFIP Seq 2
 Source Document Name Landlord Statement

*Target Program Seq
 *EDS Document Type
 *Document Name
 *Folder

None Selected
 Diane Referral, MFIP Seq 2 (Enrolled)
 Ronald Referral, MFIP Seq 2 (Enrolled)
 Ronald Referral, MFIP Seq 1 (Exited)
 Diane Referral, MFIP Seq 1 (Exited)

*Reason for Copy

Spell Check

Copy Cancel

All items marked with an asterisk are required when copying documents.

Target Program Seq*: Select the correct name & program seq.

*If there is a 2nd parent attached to this person's record, their name will appear also.

Click Copy to complete the copy process

Move Document

Users with the appropriate privileges may **Move** documents from one program sequence to another program sequence within the same person record.

For example, a document may move from **MFIP Seq 1** to **Adult Seq 1**.

Most Users can only move documents within seven days of when added to WF1's EDS system.

NOTE: Users are not allowed to move documents that are attached to payments or authorizations.

Click the **Document Summary** link from the left navigation menu and the panel shown below will appear.

EDS	▼ Hide MFIP Seq 1 - Enrolled						
Add Document	Document Name: User Defined Document Name	EDS Document Type	Uploaded Date	Document Date: Received Date	Format	Cmt Added	Action
Document Summary	Landlord Statement	MFIP - Other	10/17/2018 09:23:50 AM	10/08/2018 10/08/2018		No	Tags and Comments Copy Move Delete
DHS-IX							
MAXIS							
Incoming Status Update							
Referral							
Service							

Action: Select **Move** to access the **Document Move** panel

Document Move

Diane Referral
Birth Date 06/22/1980

Record ID 100000911
MAXIS Case 10617174

Source Person Name Diane Referral
Source Program Seq MFIP Seq 1
Source Document Name Request for Medical Opinion (DHS-2114)

***Target Program Seq**

***EDS Document Type**

***Document Name**

Folder

***Reason for Move**

All items marked with an asterisk are required when moving documents.

Target Program Seq*: Select the correct name & program seq.

*Options for this document are:

- Diane Referral, Adult Seq 1 (Elig, Not Enrolled)
- Diane Referral, Placement Retention Unit-2013 Seq 5 (Exited)
- Diane Referral, Placement Retention Unit-2013 Seq 4 (Exited)
- Diane Referral, Placement Retention Unit-2013 Seq 3 (Exited)
- Diane Referral, MJSP 2013-2015 Seq 1 (Exited)

Click Move to complete the move process

Manage Case: Move/Copy Document

Users with the appropriate privileges may access the **EDS Document Move/Copy** page by navigating to **Manage Case** in the top navigation menu and selecting "EDS Document Move/Copy".

This **Move** differs from the **Move** on page 6, as this only allows a document to move within the same program.

NOTE: Users are not allowed to move documents that are attached to payments or authorizations.

Manage Case: Select EDS Document Move/Copy to access the panel

Source Record ID = the WF1 ID of the person from which the document is being moved/copied

Target Record ID = the WF1 ID of the person to which the document is being moved/copied. This could be the same person or a different person.

Click **Next**

EDS Document Copy or Move

Source Record ID: Diane Referral, Record ID 100000911
 *Source Program Seq: MFIP Seq 3 (Enrolled)
 Target Record ID: Ronald Referral, Record ID 10023011
 *Target Program Seq: MFIP Seq 3 (Enrolled)

Next Change Record ID

This is a 2-parent household.

Action: Select Copy or Move next to the correct document to access the next panel which requires a **Reason** for the copy or move.

Document Name: User Defined Document Name	EDS Document Type	Folder	Uploaded Date	Action
Receipts	MFIP - Financial - Bills, Expenses	Support Services and Financial	09/27/2018 11:31:59 AM	Copy Move
Rights and Responsibilities	MFIP - Consent, Release of Information	Communication and Notes	09/27/2018 11:31:14 AM	Copy Move

EDS Document Copy or Move

Source Record ID: Diane Referral, Record ID 100000911
 *Source Program Seq: MFIP Seq 1 (Enrolled)
 Target Record ID: Diane Referral, Record ID 100000911
 *Target Program Seq: Adult Seq 1 (Elig, Not Enrolled) !

Please correct the following:


- Same program needs to be selected for the Source and Target Program Seq.

NOTE: Documents may only be moved to the same program; you are not able to move to a different program. Example: You cannot move a document from a person's MFIP program sequence to a person's Adult program sequence.

Delete Document

Users with the appropriate privileges may delete documents from EDS.

Click the **Document Summary** link from the left navigation menu and the panel shown below will appear.

EDS							
Add Document							
Document Summary							
DHS-IX							
MAXIS							
Incoming Status Update							
Referral							
Service							
▼ Hide MFIP Seq 1 - Enrolled							
Document Name: User Defined Document Name	EDS Document Type	Uploaded Date	Document Date: Received Date	Format	Cmt Added	Action	
Landlord Statement	MFIP - Other	10/17/2018 09:23:50 AM	10/08/2018 10/08/2018		No	Tags and Comments Copy Move Delete	

Document Delete

This action will permanently remove this document and cannot be undone. If you need to preserve this document to use elsewhere, then you may need to save the document before completing this action. Are you sure you want to permanently delete this document?

*Deletion Reason

If Other, what is the reason?

Spell Check

Yes No

Action: Select **Delete** next to the correct document to access the **Document Delete** panel

Deletion Reason: Select appropriate item

Deletion Reasons are:

- Duplicate Document
- Scanning Error
- Wrong Person
- Other

Additional info must be entered in the textbox if **Other** is selected as the **Deletion Reason**.

Click Yes to complete the deletion of the selected document

Document Types and Document Names

The following **EDS Document Types** and **Document Names** are the basic fields used when adding participant documents to WF1's EDS system.

EDS Document Type	Document Name
MFIP - Appeals and Complaints	Appeal
	Sanction Document
	Verification of Good Cause
MFIP - Assessments	Assessment
	Career Assessment
	Interest Assessment or Inventory
	Job Search Readiness Checklist
	Personality Assessment or Inventory
	Reading, Math Assessment
	Skills Assessment or Inventory
MFIP - Consent, Release of Information	Authorization to Communicate via E-mail and Texting
	Consent for Release or Exchange of Information
	Consent to Share Wage and Employment Information
	Data Privacy Form or Tennessee Notice
	Equal Opportunity (EO), How We Use Your Personal Information
	Overview Document
	Rights and Responsibilities
MFIP - Correspondence	E-mail
	Letter
	Non-Compliance Letter or Failure to Comply Notice
MFIP - Court and Legal	Background Check or Criminal History Record
	Court Document, Order, or Record
	Other Legal Document

Document Types and Document Names continued:

EDS Document Type	Document Name
MFIP - Education and Training	Certificate of Attendance or Completion
	Class List or Schedule
	Credential
	Education Plan
	FAFSA (Free Application for Federal Student Aid) Report
	Financial Aid Award Letter or Fee Statement
	Financial Aid Information Form (DHS-2646)
	Grades or Transcript
	School Books or Supplies List
	Verification of School Attendance or Progress
MFIP - Employment	Authorization for Release of Employment Information (DHS-2146)
	Business Plan
	Cover Letter
	Employability Assessment
	Employment Plan
	Employment Plan Signature Page
	Employment Verification
	Injury Protection Program (IPP)
	Job Search Activity Log
	Layoff Letter, Notice, or List
	Pay Stub or Check Stub
	Professional References
	Resume
	Sample Application for Employment
	Union Statement
	Workers Compensation Record or Claim
	Worksite Agreement

Document Types and Document Names continued:

EDS Document Type	Document Name
MFIP - Financial - Assets, Income	Car Title
	Direct Deposit Form
	Title or Deed Paper
MFIP - Financial - Authorizations, Purchase Orders, Payments	Authorization
	Purchase Order
MFIP - Financial - Bills, Expenses	Bill or Bill Statement
	Bus Card Distribution Tracking Log
	Child Care
	Day Care Provider's Statement
	Estimate or Quote
	Insurance (Car, Property)
	Invoice and Supporting Documents
	Lease Agreement
	Mileage Form or Log
	Receipts
	Transportation Support Request
MFIP - Financial - Other	Obligation Form
MFIP - Financial - Taxes	W-4 Form
MFIP - Identity	Birth Certificate
	Driver's License
	Immigration and Naturalization Document
	Permanent Resident Card
	State ID

Document Types and Document Names continued:

EDS Document Type	Document Name
MFIP - Medical	Assessor / Treatment Provider Report (DHS-4316)
	Chemical Dependency Evaluation
	Doctor's Statement
	Health Insurance Card or Medicare Card
	Medical Document, Form, Record, or Report
	Physician Certification (DHS-1503)
	Psychological Document, Form, Record, or Report
	Request for Medical Opinion (DHS-2114)
	Social Worker Document or Statement
MFIP - Other	Battered Women's Shelter Statement
	Landlord Statement
MFIP - Program-Specific	Case Transfer Checklist
	DWP/MFIP Child Care Transmittal, Request for Authorization
	DWP/MFIP Employment Services Referral (DHS-3166)
	DWP/MFIP Observation Checklist (DHS-3483)
	DWP/MFIP Status Update Form (DHS-3165)
	Extension Decision Form
	Family Stabilization Services (FSS) Eligibility
	Family Violence
	Family Violence Referral (DHS-3323)
	Family Violence Waiver Safety Plan
	Intake
	Referral
	Sanction Policy Case Review
	Uncompensated Work Experience
	Volunteer Transportation Referral Form
MFIP - Social Security	Social Security Administration (SSA) Letter
MFIP - Veterans	DD-214 Form