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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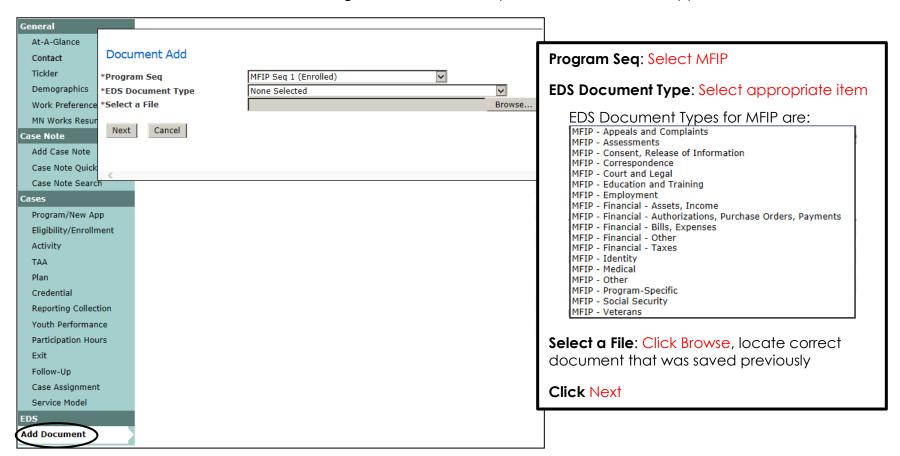
Add Document

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

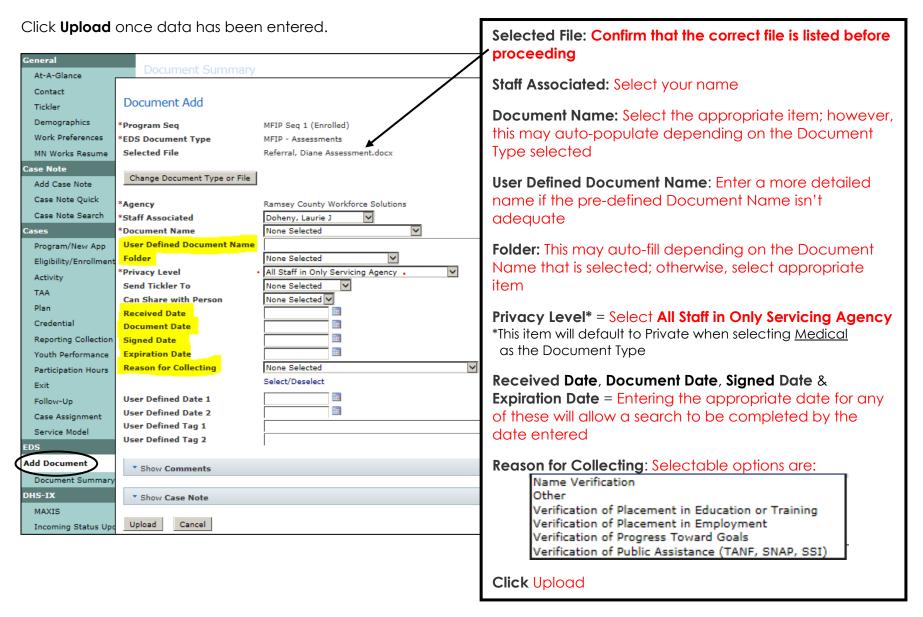
Refer to page 9 for the list of Document Types and the associated Document Names.

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



Add Document continued:

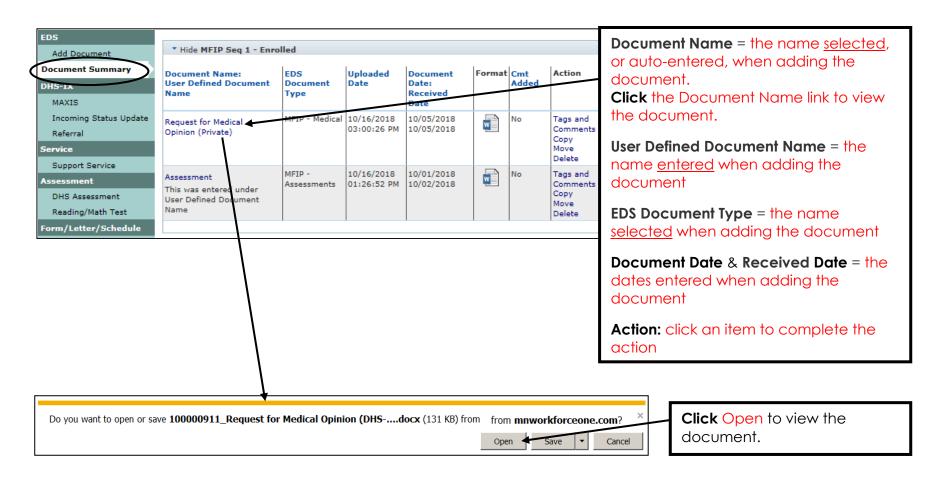
All items marked with an asterisk are required when adding documents. The items highlighted below are optional, but should be used when applicable.



Document Summary & View

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

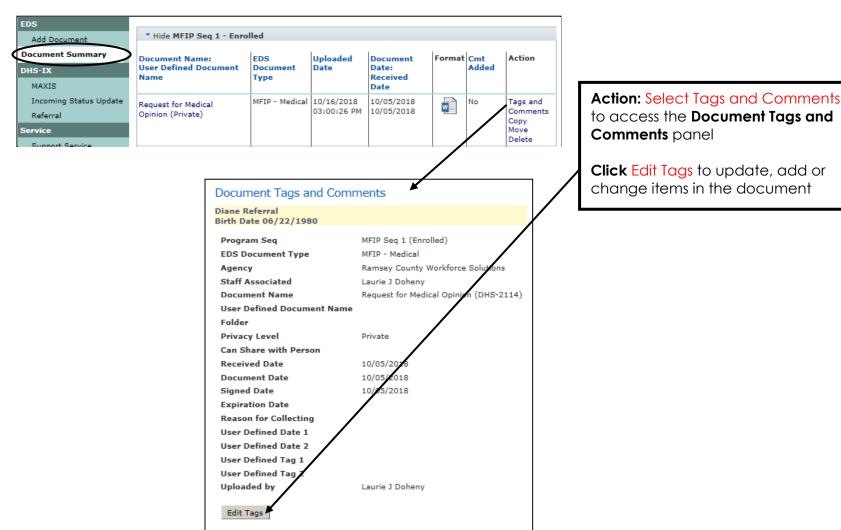
Click the **Document Summary** link from the left navigation menu and the panel shown below will appear allowing you to view the documents.



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.

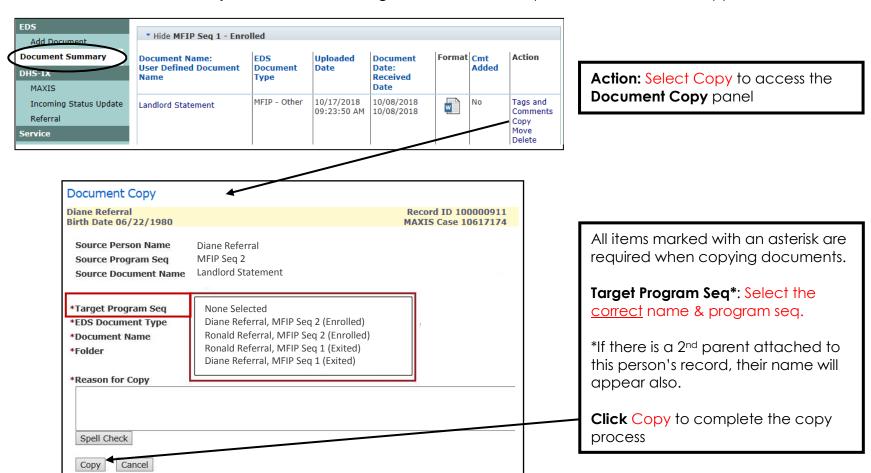


Copy Document

Users with the appropriate privileges may Copy documents:

- From one program sequence to another program sequence <u>within the same</u> 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.



Move Document

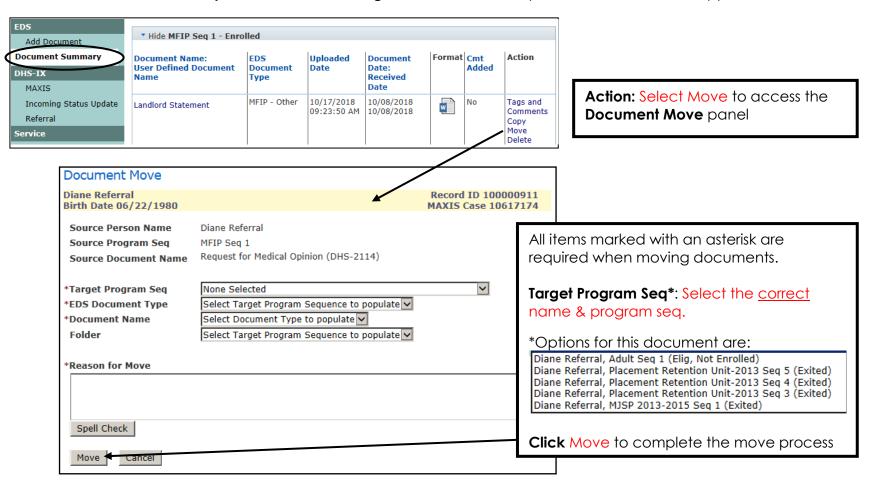
Users with the appropriate privileges may **Move** documents from one program sequence to another program sequence within the same person record.

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.

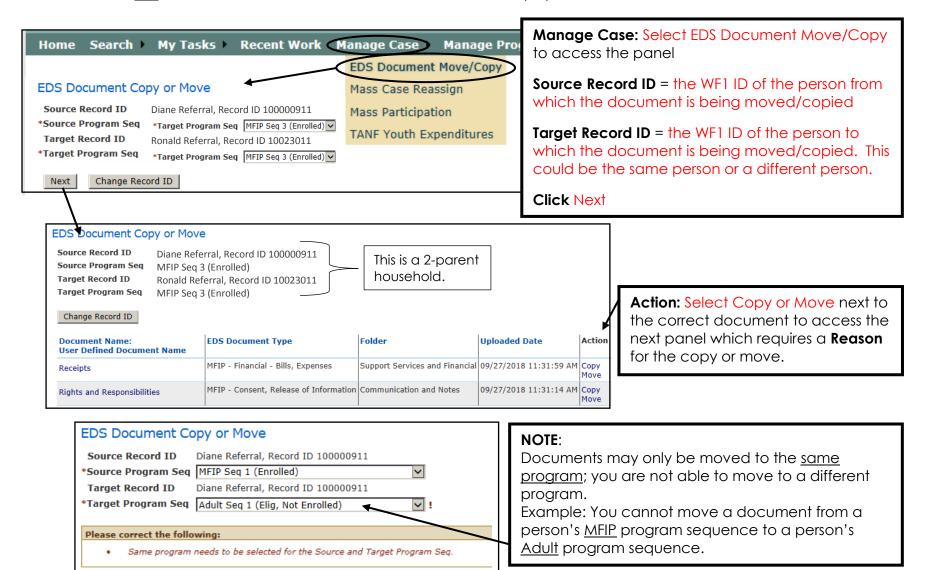


Manage Case: Move/Copy Document

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 <u>only</u> allows a document to move <u>within the same program</u>.

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

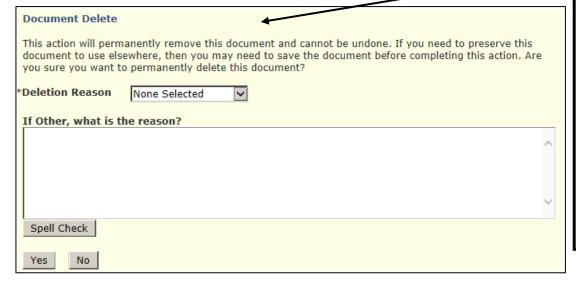


Delete Document

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.





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 Tennessen 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