

# RETAIN PHASE 2

## Workforce One (WF1)

### Data Entry

# What's in this WF1 Guide?

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## TREATMENT GROUP

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BOTH GROUPS RETAIN Wage Cohorts: Slides 118 - 121

# Frequently Asked Questions/Informational General WF1

What is WF1?

- DEED's case management tracking system
- Any case management activities not entered into WF1 are not visible to DEED and will not be captured in official federal reports

When should enrollment in WF1 happen?

- Immediately after confirming the individual's eligibility and all required documentation for program enrollment is received
- Prior to applying any funds towards an individual's case

When should I use the top and side panels of WF1?

**Top Panel:** NOT case specific. It is recommended that you explore all top panel lists and familiarize yourself with the information available to you. (Forms, resources, reports, definitions, etc.)

**Side Panel:** Case specific. Used to navigate through a participant's record and perform case management data entry requirements

# Frequently Asked Questions/Informational General WF1

- Workforce One is a Case Management Tracking System. Case Management data is used within reports to inform leading agencies of the services being provided to each individual participant using RETAIN funding
- Workforce One is the starting point to performance indicators related to served and exit counts, employment status at enrollment and exit, and credential attainment rates
- Every participant's 1<sup>st</sup> quarter prior to RETAIN enrollment, earnings in the quarter they are enrolled, and their earnings in the 1<sup>st</sup>, 2<sup>nd</sup>, 3<sup>rd</sup>, and 4<sup>th</sup> quarters after enrolling in RETAIN will be verified through Unemployment Insurance Wage Detail or Supplemental Wage Information entered into WF1 (See Slides 109-115)
- When reporting performance outcomes for the RETAIN program, participants with wages in the 1<sup>st</sup> full quarter following their exit date will be considered a positive exit
  - ❖ *If wages are found the case is a positive exit*
  - ❖ *If wages are not found the case is a negative exit*

# Frequently Asked Questions/Informational Difference in Official Performance

## Why participants with “positive” WF1 exit reasons might not be positive in official performance

- A pseudo–Social Security Number was used on the case
- Wages were not found in Unemployment Insurance Wage Detail or WF1 Supplemental Wage Information (Follow-up data)
- The worker quit or lost their job prior to the first full quarter following their program exit date

# Frequently Asked Questions/Informational The “HELP” tab



If you are ever unsure of what type of information needs to be entered on any page of WF1

- Every page in WF1 has a “Help” feature that explains and defines everything within the current WF1 screen you are in
  - Click on “Help” within the top panel while in the page in question
  - Scroll through the displayed information to find the element in question

# Frequently Asked Questions/Informational Service Desk Tickets



For login issues, call 651-297-1111. For all other WF1 issues, submit a [WF1 help desk ticket](#).

If you accidentally enter the wrong information, open the wrong activity, or need to make any correction to a WF1 case record:

1. Confirm you or your management team do not have the level of access required to make the necessary correction yourselves
2. If you or your management team do not have authorized WF1 access to make the necessary correction, click the “WF1 help desk ticket” link located at the bottom of any WF1 screen
3. Answer all questions within the ticket and submit the form as directed

# Frequently Asked Questions/Informational What's the Difference?

## RETAIN SERVICES TAB: (slides 82 – 88) The only place in WF1 that captures reportable...

- Dates of communication with the participant, employer, healthcare provider, and/or workforce professional
- Dates of workplace accommodations
- Provider ID, Referrals, meetings, receipt of certain services

## CASE NOTES TAB: (Slides 89 – 95)

Place to capture detailed Information about the case participation or progress, purpose of the contact captured in RETAIN Services, description of any outcomes, next steps, and approval of support service details and/or training fund approvals

## FOLLOW-UP TAB: (Slides 109 – 115) The only place in WF1 that captures reportable...

- Dates of communication with the participant on their employment details after the participant exits the program



# Frequently Asked Questions/Informational THE “RETAIN SERVICE” TAB

**VERY IMPORTANT:** GUIDANCE ON HOW TO CAPTURE THE FOLLOWING INFORMATION FOR THE TREATMENT GROUP BEGINS ON SLIDE 82-88 OF THIS GUIDE

- Dates of Communications and Meetings with the Employer, Healthcare Provider, Participant, and Workplace Profession
- Healthcare Provider ID
- Participant’s receipt of an Ergonomic Assessment or On-site Job Analysis
- Referrals to services beyond RETAIN after 6 months, Ergonomic Assessment, On-site Job Analysis, or other Non-RETAIN Services
- The following types of Workplace Accommodations
  - Accessible Comm/Assistive Technologies
  - Modified Work Tasks
  - Other Accommodations
  - Physical Change
  - Policy Enhancement
  - Technical Assistance
  - If accommodations are unavailable

# Logging into Workforce One

- Go to Workforce One located here:  
<https://www.mnworkforceone.com/Default.aspx>
- Enter your Username and Password
- Click **Log IN**



The screenshot shows a login form with a light blue background. It features two input fields: one for the username and one for the password. To the right of the password field is a blue button with the text "LOG IN" in white. Below the input fields, there are two links: "Forgot Username/Password" and "Help".

\*Username:

\*Password:

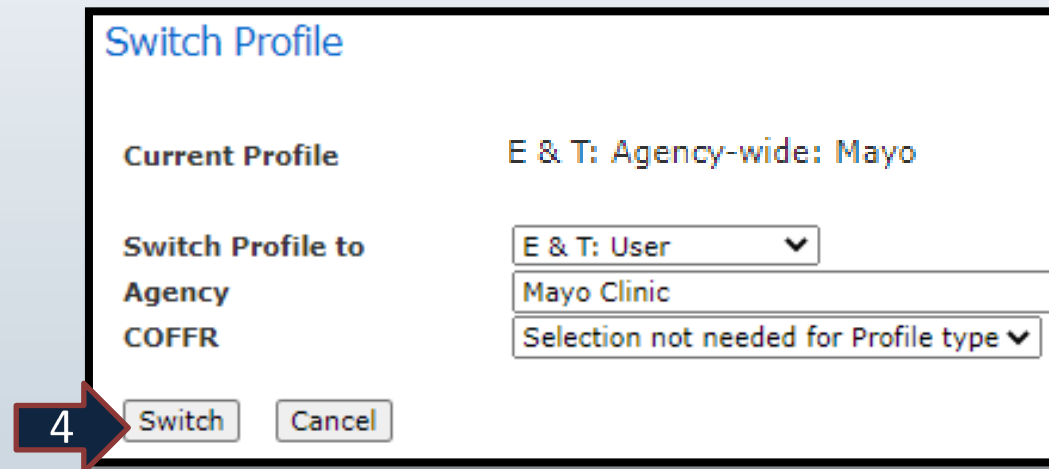
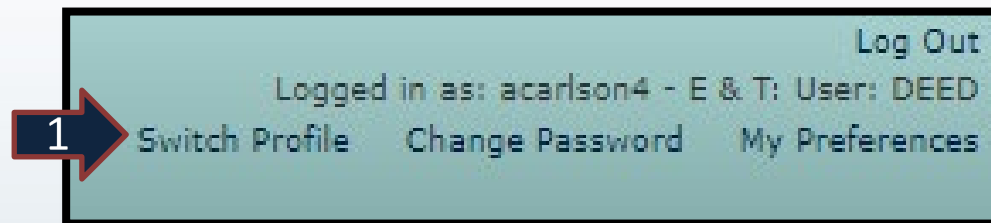
Forgot Username/Password Help

LOG IN

# FAQ: Switching your WF1 Profile to perform Case Management Data Entry

If you have multiple WF1 profiles, based on your job tasks, you may need to switch your profile before you will be able to perform case management data entry within the database

1. Click “Switch Profile” located in the top right corner of any WF1 screen
2. To have write ability as a case manager, switch your profile to “E & T: User”
3. You may need to select the Agency the case is being served by and the COFFR funding the case
4. Click “Switch”



# TREATMENT AND CONTROL GROUP PARTICIPANT RECORD SEARCH

The screenshot displays the WORKFORCE ONE application interface. At the top, the logo "WORKFORCE ONE" is visible. Below it is a navigation bar with the following items: Home, Search (highlighted with a red box and a dropdown arrow), My Tasks, Recent Work, Manage Case, Manage Program, and R. The Search dropdown menu is open, showing a list of options: Person (highlighted in yellow), Saved Searches, Advanced Search, TAA Worker, User, Connect Message Search, Document Search, Talent Pool, UI Applicant, Agency, COFFR, and Common ID. The background of the application shows a sidebar with "Dashboard" and "My Info" sections, and a footer with the Minnesota logo and contact information.

- Hover over “Search” in the top panel
- Select “Person” from the drop-down list

# TREATMENT AND CONTROL GROUP PARTICIPANT RECORD SEARCH

Person Search

▼ Hide Search Criteria

Last Name	<input type="text"/>
First Name	<input type="text"/>
Middle Initial	<input type="text"/>
SSN	<input type="text" value="216-54-8654"/>
Record ID	<input type="text"/>
MAXIS Case	<input type="text"/>
MAXIS PMI	<input type="text"/>
E-mail	<input type="text"/>
Mobile Username	<input type="text"/>
Staff Assigned	<input type="text" value="All Values"/>

- Enter the participant's Social Security Number in the "SSN" field
- Click "Run Search"

# TREATMENT AND CONTROL GROUP PARTICIPANT RECORD SEARCH

If search results are found, click on the individual's name and Skip to slide 18

Person Search

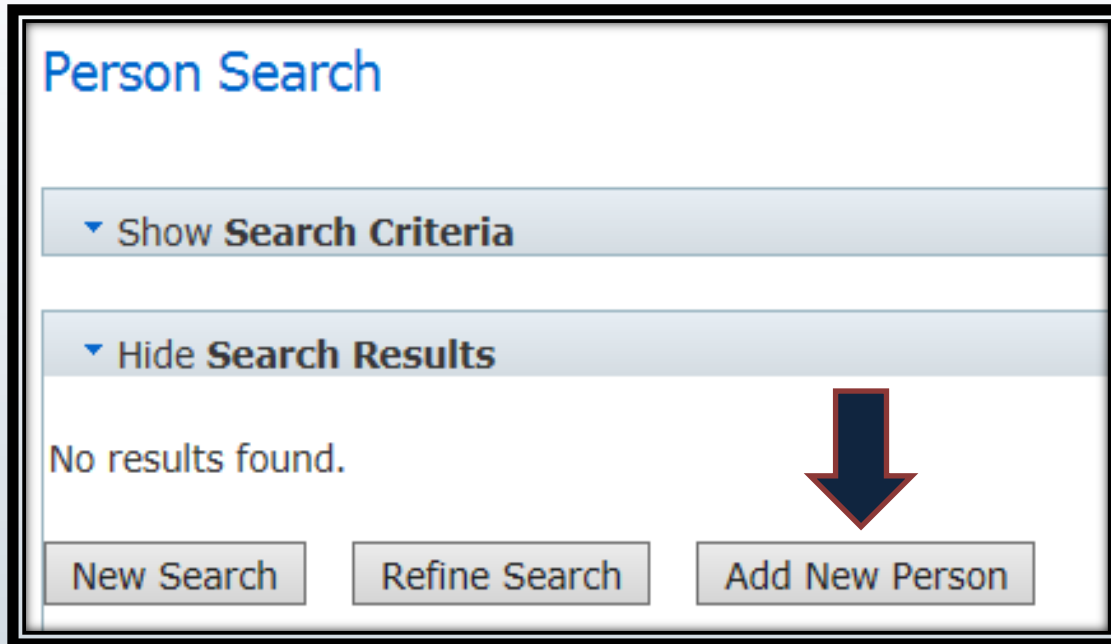
▼ Show Search Criteria

▼ Hide Search Results

Name: Birth Date ▼	SSN	Record ID
Smith, Jenna P 07/25/1976	8654	202015667

New Search   Refine Search

# TREATMENT AND CONTROL GROUP ADDING A NEW PERSON RECORD



The screenshot shows a web interface titled "Person Search". It features two dropdown menus: "Show Search Criteria" and "Hide Search Results". Below these, the text "No results found." is displayed. At the bottom, there are three buttons: "New Search", "Refine Search", and "Add New Person". A large red arrow points down to the "Add New Person" button.

- If you receive a message that says “No results found” this means the individual has never been case managed in a program using WF1
- Click on “Add New Person” to create a new shell record

# TREATMENT AND CONTROL GROUP

## ADDING A NEW PERSON RECORD

**Person Add**

SSN: 216-54-8654      SSN Verified

\*Last Name: Smith      \*First Name: Jenna      MI: P

Birth Date: 07/25/1976      Preferred First Name:

\*Address 1: 111 1st Street North

Address 2:

\*City: Eagan      \*State: MN      \*Zip: 55121

\*County: Dakota      \*Country: United States

Phone	Ext.	Phone Type	If other, please specify:	TTY	Video
(651) 387-1111		Cell		<input type="checkbox"/>	<input type="checkbox"/>
		None Selected		<input type="checkbox"/>	<input type="checkbox"/>
		None Selected		<input type="checkbox"/>	<input type="checkbox"/>
		None Selected		<input type="checkbox"/>	<input type="checkbox"/>

E-mail: jpsmith@gmail.com      E-mail Type: Personal 1

None Selected

\*Veteran Status: Not a Veteran

\*Citizen/Right to Work: Citizen

- To ensure accurate and complete reports, enter all known data into the available fields
- If the participant is not a U.S. Citizen, select “Right to Work” and enter the person’s Alien Registration Card Number and its Expiration Date
- Click “Save”



# TREATMENT AND CONTROL GROUP

## ADDING A NEW PERSON RECORD

**Contact Information**

Jenna P Smith Record ID 202015667  
Birth Date 07/25/1976

\*Last Name  \*First Name   
MI   
Alias Last  Alias First   
Alias MI   
Preferred First Name   
Pronoun

Phone	Ext.	Phone Type	If other, please specify:	TTY	Video
(651) 387-1111		Cell	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="text"/>	<input type="text"/>	None Selected	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="text"/>	<input type="text"/>	None Selected	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="text"/>	<input type="text"/>	None Selected	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>

Ok with receiving text messages

E-mail  E-mail Type

**Residential Address**

\*Address 1   
Address 2   
\*City  \*State  \*Zip   
\*County  \*Country

- The individual is now assigned a WF1 ID number
- This number will be used as an ID instead of the SSN
- Continue entering data into all fields that are still blank. For example, if you have alias information, preferred name, or alternate Contact, enter it.
- Click "Save"

# CONTROL GROUP SPECIFIC DATA ENTRY

# CONTROL GROUP NEW PROGRAM APPLICATION

The screenshot displays a web application interface with a navigation menu on the left and a main content area. The navigation menu is organized into sections: **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), and **Cases** (Program/New App, Eligibility/Enrollment). The main content area shows the **Program Summary** for Jenna P Smith, with a Record ID of 202015667. A yellow highlight is present under the name and birth date. Below this, there is a button labeled "Add New Application" and a message stating "No program sequences to display." Two red arrows with numbers 1 and 2 point to the "Program/New App" menu item and the "Add New Application" button, respectively.

1. Select "Program/New App" in the side panel
2. Click on "Add New Application"

# CONTROL GROUP Before Moving Forward

This worker has been assigned to a study group.

Please record the worker's MathematicalID and study group assignment for entry into your state's management information system.

You will not be able to retrieve this information after you exit this page.

MathematicalID: **40002923**

Study group assignment: **Control**

I have recorded the MathematicalID and study group assignment.

Exit this worker's record by clicking the I AM DONE button.

✓ I AM DONE

You will need the following information from Mathematica's Random Assignment System "CONFIRMIT"

1. Mathematica/Confirmit ID
2. Study Group Assignment
  - Treatment
  - Control

# CONTROL GROUP

## NEW PROGRAM APPLICATION

**New Application**

Jenna P Smith Record ID 202015667  
Birth Date 07/25/1976

Step: **1. Application**    2. Eligibility    3. Enrollment

\*Program: RETAIN

\*Application Date: 11/15/2021

Agency: Mayo Clinic  
[Display Funding Stream Options](#)

COFFR: Mayo Clinic - SDA 163

Location: Mayo Clinic

Service Model: No service models found

Primary Staff: Carlson, Amy

Support Staff: Westphal, Samantha

Send Tickler:

[Show Case Note](#)

[Show User Defined Fields](#)

[Continue to Eligibility](#)    [Save and Exit Wizard](#)    [Cancel](#)

- Program name: RETAIN
- Application Date: Date participant signed their application
- Primary Staff: Select the assigned case manager
- Support Staff: Person who will also be entering data on the case or coverage for Primary
- Click “Continue to Eligibility”

# CONTROL GROUP ELIGIBILITY DATA ENTRY

Step:	1. Application	2. Eligibility	3. Enrollment
<b>Program Seq</b>	1		
<b>Agency: Location</b>	Mayo Clinic: Mayo Clinic		
<b>Entered by</b>	Amy Carlson		
<b>Application Date</b>	08/01/2022		
<b>*Decision Date</b>	<input type="text" value="08/01/2022"/>		
<b>*Birth Date</b>	<input type="text" value="03/23/1948"/>	<b>Age</b>	74
<b>*Resident of MN</b>	<input type="text" value="Yes"/> ▼		
<b>*Working in MN</b>	<input type="text" value="Yes"/> ▼		
<b>*Diagnosis of Illness/Injury that Impacts Employment</b>	<input type="text" value="Yes"/> ▼		
<b>*Invasive Procedure within Past 12 Weeks or within Next 8 Weeks that impacts Employment</b>	<input type="text" value="No"/> ▼		
<b>*Employed within the Last 6 Months</b>	<input type="text" value="Yes"/> ▼		
<b>*RETAIN Healthcare Sub/Recipient Employee</b>	<input type="text" value="No"/> ▼		
<b>*Employer Offers Return to Work Program</b>	<input type="text" value="No"/> ▼		
<b>*Legal Representation/Litigation related to Workers' Compensation</b>	<input type="text" value="No"/> ▼		
<b>*Has Capacity to give Appropriate Informed Consent</b>	<input type="text" value="Yes"/> ▼		
<b>*Confirmit ID Number</b>	<input type="text" value="40000121"/>		
<b>*Part of Control or Treatment Group</b>	<input type="text" value="Control"/> ▼		
<input type="button" value="Determine Results"/>			
<b>Determination Results</b>		Eligible	
<input type="button" value="Save and Continue to Enrollment"/> <input type="button" value="Save and Exit Wizard"/> <input type="button" value="Cancel"/>			

- Decision Date: Date RTWCM determined eligibility based off application data
- Enter Mathematica ID provided through Confirmit
- Select “Control” for the last question
- Click “Determine Results”
- If determined “Ineligible” an error will display at the bottom of the screen that must be corrected before moving forward
- If determined “Eligible” click “Save and Continue to Enrollment”

# CONTROL GROUP PARTICIPANT ENROLLMENT

Step: 1. Application 2. Eligibility **3. Enrollment**

Program Seq 1  
 Agency: Location Mayo Clinic: Mayo Clinic  
 Entered by Amy Carlson Last Updated by Amy Carlson  
 Application Date 08/01/2022 Decision Date 08/01/2022

\*Enrollment Date 08/01/2022  
 \*Initial Services Date 08/01/2022  
 \*Primary Staff Carlson, Amy  
 SSN 561-65-6542

\*Last Name Johnson \*First Name Paula MI P  
 \*Birth Date 03/23/1948 Age 74  
 \*Address 1 333 3rd Street  
 Address 2  
 \*City Eagan \*State MN \*Zip 55121  
 \*County Dakota \*Country United States

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

OK with receiving text messages Yes

E-mail johnson@gmail.com E-mail Type Personal 1

- Continue your data entry throughout the entire Enrollment Screen
- Initial Service date is the first date you communicated with the worker/participant
- Confirm previously entered contact information is accurate

# CONTROL GROUP

## PARTICIPANT ENROLLMENT

*Gender	Female
*Ethnicity - Hispanic or Latino	Person is Not Hispanic or Latino
*Race	<input type="checkbox"/> American Indian or Alaska Native <input type="checkbox"/> Black or African American <input type="checkbox"/> Hawaiian Native/Pacific Islander <input type="checkbox"/> Asian <input type="checkbox"/> Did Not Self-Identify <input checked="" type="checkbox"/> White
*Primary Language	English
*Veteran Status	Not a Veteran
*Highest Level of Education	Education Beyond the Bachelor's Degree
*Applied or Received SSI/SSDI	No
*Public Income Received	Other Public Programs
	Select/Deselect
*If Other Public Programs	TANF, SNAP, MFIP
*Referred to RETAIN by	Self-Referral - Social Media or Press Coverage
*Housing Problems and/or Economic Circumstances	No
*Medical Insurance Coverage	Other
	Select/Deselect
*If Other Medical Insurance	Refugee Medical Assistance
*Current Health Condition	Good
*Current Injury/Illness Limits the Type or Amount of Work	Yes
*Primary Injury or Illness	Ankle
*Primary Condition Resulted From	Accident or Injury
*Injury or Illness Onset Date	07/15/2022
*Injury/Illness Caused by Work-Related Factors	No
*Part of Workers' Compensation Claim	No
*Is Injury or Illness New or Worsening	New

- If Referred to RETAIN by "OTHER" explain in case note section at bottom of this screen
- If the injury or illness is worsening, use the date it began to worsen as the onset date
- If there is "Select/Deselect" underneath a dropdown list, clicking on it will allow you to select more than one choice



# CONTROL GROUP PARTICIPANT ENROLLMENT

*Has Substance Use Disorder	No
*Has Mental Illness Diagnosis	No
*Current Employer Name	IBM
*Employer Industry Classification	Manufacturing
*Labor Force Status	Employed Full-Time
*In Last 12 Months, Job Paid More than \$1,000 a Month	Yes
*Hours per Week Worked Prior to Injury/Illness	40
*Occupation of Pre-Injury/Illness Job	Management, Professional, or Related
*Employed at Current Job	Between 2 Years and 5 Years
*Absence from Work Begin Date	07/20/2022
*How Long Since Last at Work	Between 1 Day and 1 Week
*Number of Work-Loss Days	5
*Number of Days Working with Restrictions	5
*Person Expressed Dissatisfaction/Conflict With Current Job/Employer	No
Other Employability Risk Factors	threat of being fired

- Continue entering data using the information provided to you on the participant's application
- Using the dropdown lists provided, make the selection that best fit the information provided by your participant


# CONTROL GROUP PARTICIPANT ENROLLMENT

**Open Initial Activity**

\*Activity Type

Activity Subtype

\*Funding Stream

Estimated End Date  

Estimated Hours

**Case Note**

If Referred to RETAIN by "OTHER"  
EXPLAIN WHAT "OTHER" MEANS IN THIS SECTION

- Since participants in the Control Group will only receive one service and that service is to receive a brochure, the “Informational Brochure” activity must be the first and only activity on a Control Group participant’s case record
- Click “Enroll”

# CONTROL GROUP

## Participant is now Enrolled!

**WORKFORCE ONE**

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

Enrollment saved. ✓

### Eligibility/Enrollment Summary

**Jenna P Smith** Record ID 202015667  
Birth Date 07/25/1976

▼ Hide RETAIN Seq 1 - Enrolled

Eligibility/Determination Date	11/15/2021
Eligibility Agency	Mayo
Enrollment Date	11/15/2021
Enrollment Agency	Mayo
COFFR	Mayo Clinic - SDA 163
Exit Date	

[View/Print Enrollment](#)

**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**

# CONTROL GROUP EXIT THE PARTICIPANT

**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  
TAA  
Plan  
Credential  
Measurable Skills Gain  
Reporting Collection  
Youth Performance

**Exit**

Follow-Up

### Exit Summary

Jenna P Smith Record ID 202015667  
Birth Date 07/25/1976

▼ Hide RETAIN Seq 1 - Enrolled

Activity(ies) to Be Closed	Funding Stream	Start Date	Staff: Agency	Staff Role
Info Brochure	Mayo RETAIN Phase 2	11/15/2021	Amy Carlson Mayo	Primary Staff

Funding Stream	Start Date	End Date
Mayo RETAIN Phase 2	11/15/2021	

Exit Program Sequence

- Click on “Exit” in the side panel immediately after enrolling a Control Group participant
- Once in the “Exit Summary” screen, click on “Exit Program Sequence”

# CONTROL GROUP PARTICIPANT EXIT

**RETAIN Exit**

**Jenna P Smith** **Record ID 202015667**  
**Birth Date 07/25/1976**

**Program Seq** 1  
**Agency: Location** Mayo Clinic: Mayo Clinic  
**Enrollment Date** 11/15/2021  
**Entered by** Amy Carlson

**\*Primary Exit Reason** Control Group

- The “Primary Exit Reason” will automatically be “Control Group”, which cannot be changed
- Click on “Next”

# CONTROL GROUP PARTICIPANT EXIT

*Exit Date	11/15/2021
*Labor Force Status	Not in the Labor Force
*Did the participant receive support services?	No
*Did the participant receive needs related payments?	No
*Disability Status	Yes, Disability is Employment Barrier
*Disability Category	Physical Impairment
*Employment Work Setting	Not Currently Employed
*Referred to Other Services Beyond RETAIN	No

▼ Hide Activities

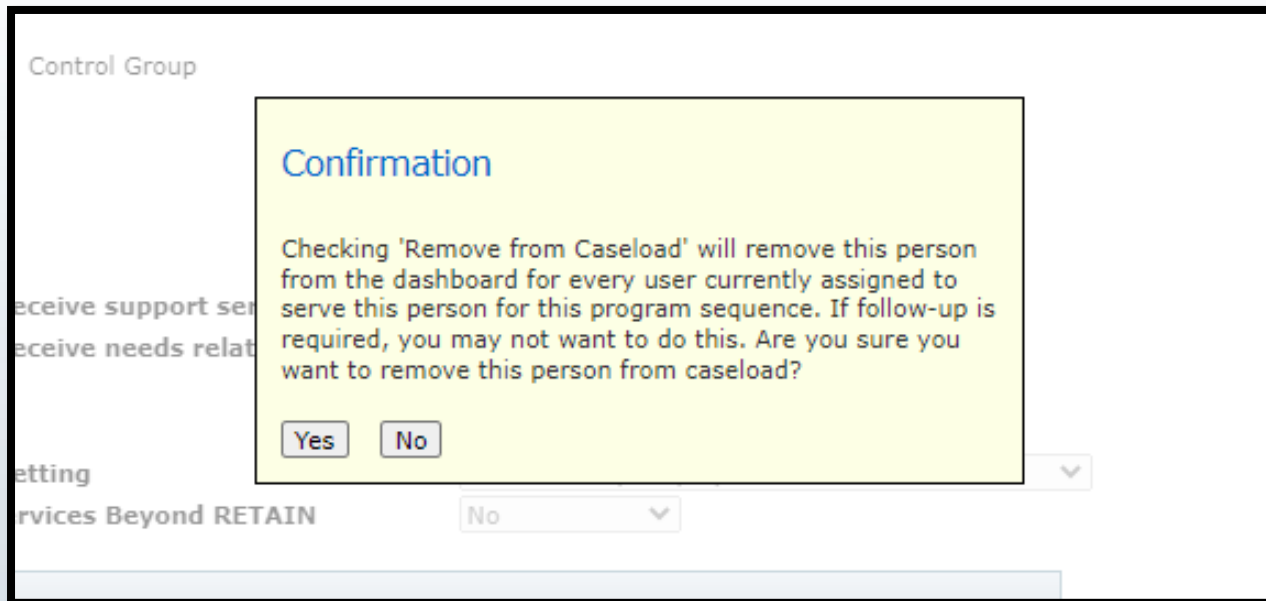
Activity: Subtype	Start Date	*Completion Result
Info Brochure	11/15/2021	Successful

▼ Show Case Note

Remove from caseload

- Complete all fields within the Exit screen with the information known at the time of enrollment
- Close the “Info Brochure” activity by selecting the successful choice within the dropdown list
- Click “Remove from caseload”
- Click “Save Final Exit”

# CONTROL GROUP PARTICIPANT EXIT



ANSWER THE “REMOVE FROM CASELOAD” WARNING AS “YES”

# THE CONTROL PARTICIPANT IS EXITED!

## Exit Summary

Jenna P Smith  
Birth Date 07/25/1976

Record ID 202015667

▼ Hide RETAIN Seq 1 - Exited

Exit Date 11/15/2021    Exit Reason    Control Group

Funding Stream	Start Date	End Date
Mayo RETAIN Phase 2	11/15/2021	11/15/2021

[View Exit](#)



# TREATMENT GROUP DATA ENTRY

# TREATMENT GROUP NEW PROGRAM APPLICATION

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

**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

**Program Summary**

Jenna A Smith Birth Date 07/25/1976 Record ID 202015680

Add New Application

No program sequences to display.

1. Select “Program/New App” in the side panel
2. Click on “Add New Application”

# TREATMENT GROUP Before Moving Forward

This worker has been assigned to a study group.

Please record the worker's MathematicalID and study group assignment for entry into your state's management information system.

You will not be able to retrieve this information after you exit this page.

MathematicalID: **40000535**  
Study group assignment: **Treatment**

I have recorded the MathematicalID and study group assignment.  
Exit this worker's record by clicking the I AM DONE button.

✓ I AM DONE

You will need the following information from Mathematica's Random Assignment System "CONFIRMIT"

1. Mathematica/Confirmit ID
2. Study Group Assignment
  - Treatment
  - Control

# TREATMENT GROUP NEW PROGRAM APPLICATION

New Application

Jenna A Smith Record ID 202015680  
Birth Date 07/25/1976

Step: **1. Application**    2. Eligibility    3. Enrollment

\*Program: RETAIN

\*Application Date: 11/15/2021

Agency: Mayo Clinic  
[Display Funding Stream Options](#)

COFFR: Mayo Clinic - SDA 163

Location: Mayo Clinic

Service Model: No service models found

Primary Staff: Carlson, Amy

Support Staff: Westphal, Samantha

Send Tickler:

▼ Show Case Note

▼ Show User Defined Fields

- Program name: RETAIN
- Application Date: Date participant signed their application
- Primary Staff: Select the assigned case manager
- Support Staff: Person who will also be entering data on the case or coverage for Primary
- Click “Continue to Eligibility”

# TREATMENT GROUP ELIGIBILITY DATA ENTRY

Step: 1. Application 2. Eligibility 3. Enrollment

Program Seg 1  
Agency: Location Mayo Clinic: Mayo Clinic  
Entered by Amy Carlson  
Application Date 08/01/2022

\*Decision Date 08/01/2022  
\*Birth Date 03/23/1948 Age 74  
\*Resident of MN Yes  
\*Working in MN Yes  
\*Diagnosis of Illness/Injury that Impacts Employment Yes  
\*Invasive Procedure within Past 12 Weeks or within Next 8 Weeks that impacts Employment No  
\*Employed within the Last 6 Months Yes  
\*RETAIN Healthcare Sub/Recipient Employee No  
\*Employer Offers Return to Work Program No  
\*Legal Representation/Litigation related to Workers' Compensation No  
\*Has Capacity to give Appropriate Informed Consent Yes  
\*Confirmit ID Number 40000121  
\*Part of Control or Treatment Group Treatment

Determine Results

Determination Results Eligible

Save and Continue to Enrollment Save and Exit Wizard Cancel

- Decision Date: Date RTWCM determined eligibility based off application data
- Enter Mathematica ID provided through Confirmit
- Select “Treatment” for the last question
- Click “Determine Results”
- If determined “Ineligible” an error will display at the bottom of the screen that must be corrected before moving forward
- If determined “Eligible” click “Save and Continue to Enrollment”

# TREATMENT GROUP PARTICIPANT ENROLLMENT

Step: 1. Application 2. Eligibility **3. Enrollment**

Program Seq 1  
 Agency: Location Mayo Clinic: Mayo Clinic  
 Entered by Amy Carlson Last Updated by Amy Carlson  
 Application Date 08/01/2022 Decision Date 08/01/2022

\*Enrollment Date 08/01/2022  
 \*Initial Services Date 08/01/2022  
 \*Primary Staff Carlson, Amy  
 SSN 561-65-6542

\*Last Name Johnson \*First Name Paula MI P  
 \*Birth Date 03/23/1948 Age 74  
 \*Address 1 333 3rd Street  
 Address 2  
 \*City Eagan \*State MN \*Zip 55121  
 \*County Dakota \*Country United States

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

OK with receiving text messages Yes

E-mail johnson@gmail.com E-mail Type Personal 1

- Continue your data entry throughout the entire Enrollment Screen
- Initial Service date is the first date you communicated with the worker/participant
- Confirm previously entered contact information is accurate

# TREATMENT GROUP PARTICIPANT ENROLLMENT

*Gender	Female
*Ethnicity - Hispanic or Latino	Person is Not Hispanic or Latino
*Race	<input type="checkbox"/> American Indian or Alaska Native <input type="checkbox"/> Black or African American <input type="checkbox"/> Hawaiian Native/Pacific Islander <input type="checkbox"/> Asian <input type="checkbox"/> Did Not Self-Identify <input checked="" type="checkbox"/> White
*Primary Language	English
*Veteran Status	Not a Veteran
*Highest Level of Education	Education Beyond the Bachelor's Degree
*Applied or Received SSI/SSDI	No
*Public Income Received	Other Public Programs
	Select/Deselect
*If Other Public Programs	TANF, SNAP, MFIP
*Referred to RETAIN by	Self-Referral - Social Media or Press Coverage
*Housing Problems and/or Economic Circumstances	No
*Medical Insurance Coverage	Other
	Select/Deselect
*If Other Medical Insurance	Refugee Medical Assistance
*Current Health Condition	Good
*Current Injury/Illness Limits the Type or Amount of Work	Yes
*Primary Injury or Illness	Ankle
*Primary Condition Resulted From	Accident or Injury
*Injury or Illness Onset Date	07/15/2022
*Injury/Illness Caused by Work-Related Factors	No
*Part of Workers' Compensation Claim	No
*Is Injury or Illness New or Worsening	New

- If Referred to RETAIN by "OTHER" explain in case note section at bottom of this screen
- If the injury or illness is worsening, use the date it began to worsen as the onset date
- If there is "Select/Deselect" underneath a dropdown list, clicking on it will allow you to select more than one choice

# TREATMENT GROUP PARTICIPANT ENROLLMENT

*Has Substance Use Disorder	No
*Has Mental Illness Diagnosis	No
*Current Employer Name	IBM
*Employer Industry Classification	Manufacturing
*Labor Force Status	Employed Full-Time
*In Last 12 Months, Job Paid More than \$1,000 a Month	Yes
*Hours per Week Worked Prior to Injury/Illness	40
*Occupation of Pre-Injury/Illness Job	Management, Professional, or Related
*Employed at Current Job	Between 2 Years and 5 Years
*Absence from Work Begin Date	07/20/2022
*How Long Since Last at Work	Between 1 Day and 1 Week
*Number of Work-Loss Days	5
*Number of Days Working with Restrictions	5
*Person Expressed Dissatisfaction/Conflict With Current Job/Employer	No
Other Employability Risk Factors	threat of being fired

- Continue entering data using the information provided to you on the participant's application
- Using the dropdown lists provided, make the selection that best fit the information provided by your participant




# TREATMENT GROUP PARTICIPANT ENROLLMENT

**Open Initial Activity**

\*Activity Type

Activity Subtype

\*Funding Stream

Estimated End Date  

Estimated Hours

**Case Note**

If Referred to RETAIN by "OTHER"  
EXPLAIN WHAT "OTHER" MEANS IN THIS SECTION

- Since treatment group participants receive information on the program's purpose and the services RTWCMs can provide them, the 1<sup>st</sup> activity must be "Orientation"
- Click "Enroll"

# TREATMENT GROUP

## Participant is now Enrolled!

**WORKFORCE ONE**

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

**General** ✔ Enrollment saved.

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**

### Eligibility/Enrollment Summary

**Jenna A Smith** Record ID 202015680  
Birth Date 07/25/1976

▼ Hide RETAIN Seq 1 - Enrolled

Eligibility/Determination Date	11/15/2021
Eligibility Agency	Mayo
Enrollment Date	11/15/2021
Enrollment Agency	Mayo
COFFR	Mayo Clinic - SDA 163
Exit Date	

[View/Print Enrollment](#)

# TREATMENT GROUP

## Individual Employment Plan (IEP) Requirement

An Individualized Employment Plan must be completed by the counselor and the participant in accordance with the IEP policy located here:

<https://apps.deed.state.mn.us/ddp/PolicyDetail.aspx?pol=411>

Since the IEP is the participant's plan and is a living document it must

- Be updated when an Obstacle or Barriers are overcome
- Goals/Objectives are achieved
- New goals/objectives are set
- Situations or Life changes occur
- Be signed/dated by the counselor and the participant with new signatures/dates added each time it is updated
- Be provided to the participant and a copy must be placed in the case file when the first plan is approved as well as all updated/modified plans

# TREATMENT GROUP

## Individual Employment Plan (IEP) Requirement

Home Search ▶ My Tasks ▶ Recent Work Manage Case ▶ Manage Program ▶

**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
- TAA

**Plan**

- Credential

**Plan Summary**

Jenna A Smith  
Birth Date 07/25/1976

Hide RETAIN Seq 1 - Enrolled

No plans found.

Add Plan

An IEP must be captured in WF1 with a plan approval date no later than 15 days after the enrollment date

1. Click on “Plan” in the side panel of the case record
1. In the Plan Summary screen, click on “Add Plan”



# TREATMENT GROUP

## Individual Employment Plan (IEP) Requirement

**RETAIN Employment Plan**

Jenna A Smith Record ID 202015680  
Birth Date 07/25/1976

**Program Seq** 1  
**Agency: Location** Mayo Clinic: Mayo Clinic  
**Entered by** Amy Carlson  
**Staff Assigned** Amy Carlson

**\*Plan Mode**  None Selected ▾  
None Selected  
Online   
Paper

1. Select "PAPER"
2. Click "Save and Continue"

# TREATMENT GROUP




## CAPTURING THE IEP FOR FEDERAL REPORTS

**RETAIN Employment Plan**

**Jenna A Smith**  
Birth Date 07/25/1976

<b>Program Seq</b>	1
<b>Agency: Location</b>	Mayo Clinic: Mayo Clinic
<b>Entered by</b>	Amy Carlson
<b>Staff Assigned</b>	Amy Carlson
<b>Plan Mode</b>	Paper

▼ Show Case Note

<b>Plan Status</b>	Pending
<b>*Start Date</b>	12/10/2021  ← 1
<b>Review Date</b>	12/10/2022  ← 2
<b>*Confirmation Date</b>	12/10/2021  ← 3

1. **START DATE:** Is when the plan started
2. **REVIEW DATE:** Is the date you will receive a reminder to update (not to exceed 1 year into the future)
3. **CONFIRMATION DATE:** Is the date the plan was signed by the Case Manager and Participant
4. Click Save and Active

# TREATMENT GROUP

## CAPTURING THE IEP FOR FEDERAL REPORTS

- 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
- TAA
- Plan**

### Plan Summary

Jenna A Smith Record ID 202015680  
Birth Date 07/25/1976

▼ Hide RETAIN Seq 1 - Enrolled

Plan Type: Mode	Plan Status	Start Date: End Date	Staff: Agency
Employment Plan Paper	Active	12/10/2021	Amy Carlson Mayo

THE INDIVIDUAL EMPLOYMENT PLAN IS CAPTURED!

# TREATMENT GROUP

## WF1 ACTIVITIES

### WF1 Activities track

- What your participant has done, is doing, and (whenever possible) what they plan to do next
- The provider funding the service and who approved the participant to receive the service
- The date your participant started receiving the service and when they no longer needed that service (activity start and end dates)
- Where they received the service and employer/training details related to that service



# TREATMENT GROUP WF1 ACTIVITIES

## Open WF1 Activities:

- ❖ *Are services the participant is currently receiving*
- ❖ *The activity start date is the date the participant started receiving that service*

## Closed WF1 Activities:

- ❖ *Are the services the participant is no longer receiving*
- ❖ *The activity end date is the date the participant stopped receiving that service*

# TREATMENT GROUP

## WF1 Available Activities

Apprenticeship  
Assessment  
Career Counseling  
Classroom Training  
Credential Attained without Training  
Customized Training  
Employability Assessment  
GED Training  
Holding  
Individual Plan Development  
Job Readiness  
Job Retention

Non-Credentialed Training  
OJT - Public or Private  
Orientation  
Paid Work Experience  
Partnering  
Restricted Work  
Returned to Work  
Staff Assisted Job Placement  
Staff Assisted Job Search in Area  
Transitional Employment  
Uncompensated Work Experience  
Work Loss

# TREATMENT GROUP IMPORTANT ACTIVITIES

IF THE PARTICIPANT IS WORKING WITH RESTRICTIONS AT TIME OF ENROLLMENT **OR** AT ANYTIME DURING ENROLLMENT YOU MUST OPEN THE **“RESTRICTED WORK”** ACTIVITY

---

IF THE PARTICIPANT IS NOT WORKING AT TIME OF ENROLLMENT **OR** AT ANYTIME DURING ENROLLMENT, YOU MUST OPEN THE **“WORK LOSS”** ACTIVITY

As soon as one of these activities is opened on the case, the counselor will be able to capture the counts required in the RETAIN Service tab (See slides starting on 85)

# TREATMENT GROUP

## WF1 Activity Definitions

**Classroom Training:** An organized program or course of study that provides specific vocational skills that lead to proficiency in performing actual tasks and technical functions required by certain occupational fields at entry, intermediate, or advanced levels and results in an industry-recognized credential when successfully completed.

**Customized Training:** Training that is designed to meet the specific requirements of an employer (including a group of employers) that is conducted with a commitment by the employer to employ an individual upon successful completion of the training and for which the employer pays a significant portion of the cost of training according to several criteria.

**Employability Assessment:** Questioning the participant about ways they perform work tasks and/or questioning the supervisor on specific job tasks and activities as needed

**GED Training:** Attending approved training to obtain a General Equivalency Diploma (GED) funded by the RETAIN program.

**Holding:** The participant will be out of contact for more than 30 days. Example: Has been institutionalized, a family member is very ill, the participant is having surgery.

# TREATMENT GROUP

## WF1 Activities and when to use them

**Individual Plan Development:** IEPs are developed jointly by the participant case manager. The plan is an ongoing strategy to identify employment goals, achievement objectives, and an appropriate combination of services for the participant to achieve employment goals. Service providers must keep IEPs current to ensure all parties involved are accountable for their responsibilities.

**Informational Brochure:** Provides the participant with information on resources available through American Job Centers, CareerOne, and the Job Accommodation Network

**Job Readiness:** When reviewing symptoms and medical conditions with participant to determine the impact on essential job functions, reviewing physician restrictions with the participant, resolving differences in work restrictions from multiple providers, and when collaborating with the healthcare provider, participant, and employer to brainstorm solutions to barriers and mitigate physical risk factors

# TREATMENT GROUP

## WF1 Activities and when to use them

**Job Retention**: to capture the start date of work loss days for participants enrolled in RETAIN prior to having surgery that will impact their ability to work. If a participant can perform work tasks at the time of enrollment due to a future scheduled surgery, this activity must be opened. The end date of this activity indicates the first day of work loss.

**Non-credential Training**: An organized course of study that provides specific vocational skills that lead to proficiency in performing actual tasks required by certain occupational fields at entry, intermediate, or advanced levels but does not result in an industry- recognized credential when successfully completed.

**OJT - Public or Private**: is designed to provide a participant with the knowledge and skills necessary to perform full-time/long term employment job tasks. It provides reimbursement to the employer of up to a set percentage of the participant's given wage rate to assist in training costs and additional supervision related to the job training taking into account the content of training, prior work experience of the participant, and the service strategy of the participant, as appropriate.

# TREATMENT GROUP

## WF1 Activities and when to use them

**Orientation**: When the participant receives information on the RETAIN program, its services, and information on roles and responsibilities

**Paid Work Experience**: Paid structured learning experience that takes place in a workplace for a limited period of time. An internship or other work experience may be arranged within the private for-profit sector, the non-profit sector, or the public sector. Labor standards apply in any work experience setting with an employee/employer relationship, as defined by the Fair Labor Standards Act.

**Partnering**: Indicates the participant was assigned a QRC through Workers' Comp

**Restricted Work**: If at any time your participant's employer allows the participant to continue working with restrictions, modified work tasks, or accommodations.

**Returned to Work**: If the participant returns to their pre-injury illness job but has not yet exited from the RETAIN program. State date of this activity must be the date returned to work.

**Staff Assisted Job Placement**: When recommending/promoting the participant to prospective employers (participant consent required)

# TREATMENT GROUP

## WF1 Activities and when to use them

**Staff Assisted Job Search in Area:** Informing the participant of relevant job postings related to their interested career/industry located within a 35-mile commute from their residence. Includes providing information on in-demand industry sectors and occupations

**Transitional Employment/Job:** time-limited, paid work experiences that are subsidized up to 100% for individuals with barriers to employment who are chronically unemployed or who have an inconsistent work history. Must be combined with comprehensive career and supportive services as well as designed to establish a work history, demonstrate success in the workplace, and develop skills that lead to entry into and retention in unsubsidized employment

**Uncompensated Work Experience:** Unpaid structured learning experience that takes place in a workplace for a limited period of time. An internship or other work experience may be arranged within the private for-profit sector, the non-profit sector, or the public sector. Labor standards apply in any work experience setting with an employee/employer relationship, as defined by the Fair Labor Standards Act.

**Workforce Preparation and Education:** Indicates the participant was referred to employment services provided by a workforce development agency and will continue receiving RETAIN services from a RTWCM at the same time.



# What Training Activities need a Measurable Skills Gain Captured?

<b>Apprenticeship</b>	<b>Classroom Training</b>
<b>Customized Training</b>	<b>GED Training</b>
<b>OJT - Public or Private</b>	

# What Training Activities need a Credential Captured?

<b>Apprenticeship</b>	<b>Classroom Training</b>
<b>Customized Training</b>	<b>GED Training</b>

# TREATMENT GROUP OPENING ACTIVITIES ON THE CASE RECORD

The screenshot displays a web interface for a case record. On the left is a side panel with a menu. The 'Activity' option is highlighted, indicated by a red arrow with the number '1'. The main content area is titled 'Activity Summary' and shows details for 'Jenna A Smith' (Record ID 202015680, Birth Date 07/25/1976). Below this, there is a section for 'Enrollment Date: 11/15/2021' and 'Exit Date:'. A table lists activities, with one row for 'Orientation' (Subtype: Work Exp Type, Funding Stream: Mayo RETAIN Phase 2, Start Date/End Date: 11/15/2021 Open, Staff: Amy Carlson Mayo, Agency: Mayo, Action: Edit Copy). Below the table is a button labeled 'Add RETAIN Activity', which is pointed to by a red arrow with the number '2'.

Activity: Subtype: Work Exp Type	Funding Stream	Start Date/End Date	Staff: Agency	Action
Orientation	Mayo RETAIN Phase 2	11/15/2021 Open	Amy Carlson Mayo	Edit Copy

1. Click on “Activity” within the side panel of the participant’s case record
2. Click “Add RETAIN Activity”

# TREATMENT GROUP

## OPENING ACTIVITIES ON THE CASE RECORD

### RETAIN Activity

Jenna A Smith Record ID 202015680  
Birth Date 07/25/1976

**Program Seq** 1  
**Agency: Location** Mayo Clinic: Mayo Clinic  
**Enrollment Date** 11/15/2021  
**Entered by** Amy Carlson  
**\*Assign to Staff** Carlson, Amy (Current Primary) ▼  
**\*Activity Type** Individual Plan Development ▼

- Confirm the “Assign to Staff” is correct. If not, select the correct staff within your agency that approved the service for the participant.
- Select the “Activity Type” from the dropdown list that best describes the service the participant will/is receiving.
- Click “Next”

# TREATMENT GROUP

## OPENING ACTIVITIES ON THE CASE RECORD

Activity Type Individual Plan Development

Change Activity/Staff

Hide Open Activity

\*Start Date 11/15/2021

Estimated End Date

Funding Stream Mayo RETAIN Phase 2

Activity Subtype

Delivery Method Virtual

Estimated Cost \$

Estimated Hours

User Defined Text 1

User Defined Text 2

User Defined Date

Show Comments

Show Case Note

Hide Close Activity

End Date

Actual Cost \$

Completion Results None Selected

Actual Hours

Save Save and Open New Activity Cancel

- The start date is the date the participant began the specific service
- If you have an estimated end date, cost, or hours enter those details
- Select the “Delivery Method” anticipated
- Skip the “Comments” and “Case Note” section (See case note section of this PowerPoint for instructions on how to capture these)
- Click “Save”

# TREATMENT GROUP

## OPENING ACTIVITIES ON THE CASE RECORD

### Activity Summary

Jenna A Smith  
Birth Date 07/25/1976

Record ID 202015680

▼ Hide RETAIN Seq 1 - Enrolled

Enrollment Date: 11/15/2021 Exit Date:

Activity: Subtype: Work Exp Type	Funding Stream	Start Date/ End Date	Staff: Agency	Action
Job Readiness	Mayo RETAIN Phase 2	12/03/2021 Open	Amy Carlson Mayo	Edit Delete Copy
Employability Assess	Mayo RETAIN Phase 2	12/03/2021 Open	Amy Carlson Mayo	Edit Delete Copy
Career Counseling	Mayo RETAIN Phase 2	11/15/2021 Open	Amy Carlson Mayo	Edit Delete Copy
Assessment	Mayo RETAIN Phase 2	11/15/2021 Open	Amy Carlson Mayo	Edit Delete Copy
Indv Plan Dvpmt	Mayo RETAIN Phase 2	11/15/2021 Open	Amy Carlson Mayo	Edit Delete Copy
Orientation	Mayo RETAIN Phase 2	11/15/2021 Open	Amy Carlson Mayo	Edit Delete Copy

Add RETAIN Activity

- Every service provided to the participant must have an activity entered on the case record that represents the service and the timeframe that type of service was provided.
- The Individualized Plan Development, Career Counseling, and Job Readiness activities should be services continuously provided to every participant

# TREATMENT GROUP

## CLOSING ACTIVITIES ON THE CASE RECORD

Work Preferences	<b>Enrollment Date: 11/15/2021 Exit Date:</b>				
MN Works Resume					
<b>Case Note</b>					
Add Case Note					
Case Note Quick					
Case Note Search					
<b>Cases</b>					
Program/New App					
Eligibility/Enrollment					
<b>Activity</b>					
TAA					
Plan					
Credential					
Measurable Skills Gain					
	<b>Activity: Subtype: Work Exp Type</b>	<b>Funding Stream</b>	<b>Start Date/ End Date</b>	<b>Staff: Agency</b>	<b>Action</b>
	Job Readiness	Mayo RETAIN Phase 2	12/03/2021 Open	Amy Carlson Mayo	Edit Delete Copy
	Employability Assess	Mayo RETAIN Phase 2	12/03/2021 Open	Amy Carlson Mayo	Edit Delete Copy
	Career Counseling	Mayo RETAIN Phase 2	11/15/2021 Open	Amy Carlson Mayo	Edit Delete Copy
	Assessment	Mayo RETAIN Phase 2	11/15/2021 Open	Amy Carlson Mayo	Edit Delete Copy
	Indv Plan Dvpmt	Mayo RETAIN Phase 2	11/15/2021 Open	Amy Carlson Mayo	Edit Delete Copy
	Orientation	Mayo RETAIN Phase 2	11/15/2021 Open	Amy Carlson Mayo	Edit Delete Copy



Click “Edit” within the “Action” column with the activity name the participant is no longer receiving

# TREATMENT GROUP

## CLOSING ACTIVITIES ON THE CASE RECORD

**RETAIN Activity**

Jenna A Smith Record ID 202015680  
Birth Date 07/25/1976

**Program Seq** 1  
**Agency: Location** Mayo Clinic: Mayo Clinic  
**Enrollment Date** 11/15/2021  
**Entered by** Amy Carlson  
**Assign to Staff** Carlson, Amy (Current Primary Staff)  
**Activity Type** Orientation

▼ Show Open Activity

▼ Show Comments

▼ Show Case Note

▼ Hide Close Activity

**End Date**   **Completion Results**  ▼  
**Actual Cost** \$  **Actual Hours**

- By clicking on the blue header lines, you can expand/collapse them
- Scroll to the bottom of the screen and enter the
  - Actual End Date the participant stopped receiving the service
  - The participant's completion results
  - The Actual Cost and Hours (if the information is available)
- Click "SAVE"



# TREATMENT GROUP ACTIVITIES ON THE CASE RECORD

Activity: Subtype: Work Exp Type	Funding Stream	Start Date/ End Date	Staff: Agency	Action
Job Readiness	Mayo RETAIN Phase 2	12/03/2021 Open	Amy Carlson Mayo	Edit Delete Copy
Employability Assess	Mayo RETAIN Phase 2	12/03/2021 Open	Amy Carlson Mayo	Edit Delete Copy
Career Counseling	Mayo RETAIN Phase 2	11/15/2021 Open	Amy Carlson Mayo	Edit Delete Copy
Assessment	Mayo RETAIN Phase 2	11/15/2021 Open	Amy Carlson Mayo	Edit Delete Copy
Indv Plan Dvpmt	Mayo RETAIN Phase 2	11/15/2021 Open	Amy Carlson Mayo	Edit Delete Copy
Orientation	Mayo RETAIN Phase 2	11/15/2021 12/10/2021	Amy Carlson Mayo	Edit Delete Copy Reopen

- RETAIN activities need to be opened and closed in accordance with the Data Entry Timeliness policy located here: <https://apps.deed.state.mn.us/ddp/PolicyDetail.aspx?pol=552>
- If the participant begins accessing a closed service again, the assigned case manager can reopen the activity

# TREATMENT GROUP

## OPENING TRAINING TYPE ACTIVITIES

**RETAIN Activity**



Jenna A Smith Record ID 202015680  
Birth Date 07/25/1976

**Program Seq** 1  
**Agency: Location** Mayo Clinic: Mayo Clinic  
**Enrollment Date** 11/15/2021  
**Entered by** Amy Carlson  
**\*Assign to Staff** Carlson, Amy (Current Primary) ▼  
**\*Activity Type** Classroom Training ▼

- Confirm the “Assign to Staff” is correct. If not, select the correct staff within your agency that approved the service for the participant.
- Select the “Activity Type” from the dropdown list that best describes the training service the participant will receive. (Apprenticeship, Classroom Training, Customized Training, GED Training, Non-credential training, OJT – Public or Private)
- Click “Next”

# TREATMENT GROUP

## OPENING TRAINING TYPE ACTIVITIES

<b>Activity Type</b>	Classroom Training
<input type="button" value="Change Activity/Staff"/>	
▼ Hide Open Activity	
*Start Date	<input type="text" value="12/01/2021"/> 
Estimated End Date	<input type="text" value="12/15/2021"/> 
Funding Stream	Mayo RETAIN Phase 2
Activity Subtype	<input type="text"/>
Delivery Method	<input type="text" value="Virtual"/> ▼
Estimated Cost	\$ <input type="text" value="150"/>
Estimated Hours	<input type="text" value="80"/>
User Defined Text 1	<input type="text"/>
User Defined Text 2	<input type="text"/>
User Defined Date	<input type="text"/>

- The start date is the date the participant begins the training service
- Enter the estimated end date, cost, and hours the participant was approved for this training

# TREATMENT GROUP

## OPENING TRAINING TYPE ACTIVITIES

▼ Hide School Info

**\*School**  - Rochester Community and Technical College  
*Clear School code for new search.*

**\*School Location**  ▼


**\*Training Program (CIP)**  - Accounting Technology/Technician and Bookkeeping  
*Clear CIP code for new search.*

**\*Training Title (O\*NET)**  - Bookkeeping, Accounting, and Auditing Clerks  
*Clear O\*NET code for new search.*

**Activity is Part of Career Pathway**  ▼

**\*Proposed Credential Type**

<input type="checkbox"/> GED	<input type="checkbox"/> High School Diploma
<input checked="" type="checkbox"/> Occupational Skills Certificate	<input type="checkbox"/> Occupational Certification
<input type="checkbox"/> Technical/Occupational Skills License	<input type="checkbox"/> Certificate of Completion of an Apprenticeship
<input type="checkbox"/> AA or AS Degree	<input type="checkbox"/> BA or BS Degree
<input type="checkbox"/> Master's Degree	<input type="checkbox"/> Doctorate Degree
<input type="checkbox"/> Other Recognized Credential	

**\*Estimated Attainment Date**  

**\*Pell Grant Recipient**  ▼

- By clicking “Search/Validate” you can easily search the codes you need related to the specific training
- Select the type of credential training
- Enter the Estimated date the participant will attain the credential and if they received a Pell Grant to assist with the cost

# TREATMENT GROUP

## OPENING TRAINING TYPE ACTIVITIES

▼ Hide Case Note

Case Manager approved certification in QuickBooks at Rochester Community College to assist the participant with the skills needed to retain employment with current employer after employer agreed to modified work tasks that require this knowledge. This training is credentialed training listed on the Eligible Training Provider List (proof in casefile) Case Manager and participant updated the IEP. Training approved to begin 12/1/2021 with an approved end date of 12/15/2021.

Spell Check

▼ Show Close Activity

Save Save and Open New Activity Cancel

- Enter a brief summary case note detailing the approved training dates, program, and school. Explain the fact you provided the participant with the ETPL and updated their IEP
- Click “Save”

# TREATMENT GROUP

## TRAINING ACTIVITY DATA ERRORS

If a participant was scheduled to begin training but the participant decided not to attend the training before any training costs were applied

**DO NOT SIMPLY CLOSE THE TRAINING ACTIVITY, DELETE IT!**

- ❖ If there is a training activity on record, reports will look for Measurable Skill Gains
- ❖ If there is a training activity on record, reports will look for a captured credential
- ❖ If there is not an MSG or a credential captured, it will result in a negative in those attainment rates

# TREATMENT GROUP Measurable Skill Gains (MSG) Data Entry Timeliness

MSGs must be entered into WF1 no later than

***15 business days after receiving proof of a gain or  
within 365 days after the start of the fiscal year***

Whichever is earlier

# TREATMENT GROUP

## 5 Types of Measurable Skill Gains (MSG)

1. **Educational Functioning Level Date:** New documented assessments showing an increase in abilities;
2. **Secondary Report Card Date:** Documented attainment of a secondary school diploma or its recognized equivalent;
3. **Post-Secondary Transcript Date:** showing sufficient number of credit hours in accordance with academic standards;
4. **Training Milestone:** OJT or Apprenticeship progress report from the employer or training provider;
5. **Skills Progression Date:** Successful passage of an exam that is required for a particular occupation or progress in attaining technical or occupational skills



## TREATMENT GROUP

Where are MSGs entered in WF1?

*“Measurable Skills Gain”*

The *ONLY* place  
to capture

**PARTICIPANT TRAINING GAINS**

# TREATMENT GROUP

## Capturing Measurable Skill Gains (MSG)

The screenshot shows a web application interface with a left-hand navigation menu and a main content area. The navigation menu is divided into sections: 'General' (containing At-A-Glance, Contact, Tickler, Demographics, Work Preferences, MN Works Resume), 'Case Note' (containing Add Case Note, Case Note Quick, Case Note Search), 'Cases' (containing Program/New App, Eligibility/Enrollment, Activity, TAA, Plan, Credential), and 'Measurable Skills Gain' (containing Reporting Collection). The main content area is titled 'Measurable Skill Gain Summary' and displays information for 'Jenna A Smith' with 'Record ID 202015680' and 'Birth Date 07/25/1976'. Below this information, it states 'No measurable skills found.' and includes a button labeled 'Add New Measurable Skill'. Two red arrows with the text 'L. Click here' point to the 'Add New Measurable Skill' button and the 'Measurable Skills Gain' menu item.

**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

### Measurable Skill Gain Summary

Jenna A Smith Record ID 202015680  
Birth Date 07/25/1976

No measurable skills found.

[Add New Measurable Skill](#)

*L. Click here*

*L. Click here*

# TREATMENT GROUP


## Capturing Measurable Skill Gains (MSG)

Measurable Skills Gain Add

Jenna A Smith Record ID 202015680  
Birth Date 07/25/1976

\*Program Sequence      RETAIN Seq 1

\*Measurable Skill Type      Secondary or Post-Secondary Transcript ▼

\*Attainment Date      12/15/2021 

- Select the type of gain your participant achieved
- Enter the Attainment Date the documentation shows as the date the gain was achieved
- Click “Save Skill”

# TREATMENT GROUP

## Measurable Skill Gains (MSG) is Captured!!

### Measurable Skill Gain Summary

Jenna A Smith

Record ID 202015680

Birth Date 07/25/1976

Measurable Skill Type	Program Sequence	Attainment Date	Program Year	Document Name: User Defined Document Name	Format	Action
Secondary or Post-Secondary Transcript	RETAIN Seq 1	<u>12/15/2021</u>	2021			Edit

# TREATMENT GROUP

## CLOSING TRAINING TYPE ACTIVITIES

Activity: Subtype: Work Exp Type	Funding Stream	Start Date/ End Date	Staff: Agency	Action
Classroom Trng	Mayo RETAIN Phase 2	12/01/2021 Open	Amy Carlson Mayo	<a href="#">Edit</a> <a href="#">Delete</a> <a href="#">Copy</a>
Job Readiness	Mayo RETAIN Phase 2	12/03/2021 Open	Amy Carlson Mayo	<a href="#">Edit</a> <a href="#">Delete</a> <a href="#">Copy</a>
Employability Assess	Mayo RETAIN Phase 2	12/03/2021 Open	Amy Carlson Mayo	<a href="#">Edit</a> <a href="#">Delete</a> <a href="#">Copy</a>
Career Counseling	Mayo RETAIN Phase 2	11/15/2021 Open	Amy Carlson Mayo	<a href="#">Edit</a> <a href="#">Delete</a> <a href="#">Copy</a>
Assessment	Mayo RETAIN Phase 2	11/15/2021 Open	Amy Carlson Mayo	<a href="#">Edit</a> <a href="#">Delete</a> <a href="#">Copy</a>
Indv Plan Dvpmt	Mayo RETAIN Phase 2	11/15/2021 Open	Amy Carlson Mayo	<a href="#">Edit</a> <a href="#">Delete</a> <a href="#">Copy</a>
Orientation	Mayo RETAIN Phase 2	11/15/2021 12/10/2021	Amy Carlson Mayo	<a href="#">Edit</a> <a href="#">Delete</a> <a href="#">Copy</a> <a href="#">Reopen</a>

Click “Edit” within the “Action” column with the training activity the participant is no attending

# TREATMENT GROUP CLOSING TRAINING TYPE ACTIVITIES

Activity Type Classroom Training

▼ Show Open Activity

▼ Show School Info

▼ Show Comments

▼ Hide Case Note

Participant successfully completed their QuickBooks certification. A copy of the attained credential is in the case file. Case Manager has captured the credential in the Credential tab of WF1.

▼ Hide Close Activity

End Date   Completion Results  ▼

Actual Cost \$  Actual Hours

- Enter a quick case note explaining the reason you are closing the activity
- End Date: the last day the participant attended classes
- Enter the completion status
- Enter the cost the program paid towards the training
- Click “Save”

**REMINDER:** Nothing in this screen allows you to capture a credential

# TREATMENT GROUP

## Credentials Attained Data Entry Timeliness

Credentials must be entered into WF1 no later than

***10 business days after receiving a copy of the credential or within 365 days from the participant's exit date***

**Whichever is earlier**

# TREATMENT GROUP CAPTURING THE CREDENTIAL

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  
TAA  
Plan  
**Credential**

Displaying 1 to 1 of 1



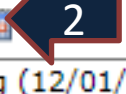
Credential Type	Program Sequence	Assoc Activity: Funding Stream	Actual Attainment Date	Last Updated By: Date	Document Name: User Defined Document Name	Format	Action
Cred Pend	RETAIN Seq 1	Classroom Trng Mayo RETAIN Phase 2		Carlson, Amy 12/10/2021			Edit

Add Credential

1. After a copy of the credential is received, click on “Credential” in the side panel
2. in the “Credential Summary Screen” click on “Edit”



# TREATMENT GROUP CAPTURING THE CREDENTIAL

Program Sequence	RETAIN Seq 1
*Credential Type	Occupational Skills Certificate 
Estimated Attainment Date	12/15/2021 
Actual Attainment Date	12/15/2021 
Associated Activity	Classroom Training (12/01/2021-Mayo RETAIN Phase 2) ▼
Comments	
<input type="button" value="Spell Check"/>	
<input type="button" value="Add Document"/>	
<input <img="" alt="arrow 3" data-bbox="106 1235 212 1328" type="button" value="Save"/>	<input type="button" value="Cancel"/>

1. Select the attained credential type from the dropdown list
2. Enter the Credential Attainment Date printed on the credential
3. Click Save

# TREATMENT GROUP THE CREDENTIAL IS CAPTURED!

✔ Credential saved.

### Credential Summary

Jenna A Smith Record ID 202015680  
 Birth Date 07/25/1976

Show  25  100  200  500  
 Displaying 1 to 1 of 1

Credential Type	Program Sequence	Assoc Activity: Funding Stream	Actual Attainment Date	Last Updated By: Date	Document Name: User Defined Document Name	Format	Action
Occ Skills Cert	RETAIN Seq 1	Classroom Trng Mayo RETAIN Phase 2	12/15/2021	Carlson, Amy 12/15/2021			<a href="#">Edit</a>

### REMINDER

The case manager needs to complete this task any time during the participant's enrollment or within 365 days after the participant's exit date for all participants with training activities!

## **RETAIN SERVICE TAB**

# TREATMENT GROUP THE “RETAIN SERVICE” TAB

## RETAIN CASE MANAGERS MUST CAPTURE ALL DATES THEY

- **Communicate** with the Employer, Healthcare Provider, Participant, and/or Workplace Professional
- **Attend meetings** with the Employer, Healthcare Provider, and/or Other Party
- **Refer** their participant to services beyond RETAIN after 6 months, Ergonomic Assessments, On-site Job Analysis, and/or other Non-RETAIN Services
- **Assist with Workplace Accommodations**
  - Accessible Comm/Assistive Technologies
  - Modified Work Tasks
  - Other Accommodations
  - Physical Change
  - Policy Enhancement
  - Technical Assistance
  - If accommodations were not unavailable
- **Dates the Participant received** of an Ergonomic Assessment or On-site Job Analysis

# THE “RETAIN SERVICE” TAB

After opening the appropriate activities (see slide 51)

Begin **MONTHLY** data entry of

**Work-Loss Days**

And/or

**Days of Restricted Work  
Activity**

# TREATMENT GROUP

## THE “RETAIN SERVICE” TAB

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

TAA

Plan

Credential

Measurable Skills Gain

Reporting Collection

Youth Performance

Exit

Follow-Up

Case Assignment

Service Model

**Document**

Add Document

Add Multiple Documents

Document Summary

**Service**

**RETAIN**

Add New RETAIN Service

Hide RETAIN Seq 1 - Enrolled - Work-Loss/Restriction Days

No Work/Loss Days exist for this program sequence.

Add New Month

### Monthly Data Entry of Work-Loss Days and Restricted Work Activities

1. Click on “RETAIN Service” in the side panel of the case record
2. Click on “Add New Month”

# TREATMENT GROUP

## THE “RETAIN SERVICE” TAB

### RETAIN Work-Loss/Restriction Days Add

Jodie J Johnson  
Birth Date 01/01/1967

Record ID 202013833

Month/Year August 2022  
Entered by Amy Carlson  
Last Updated by

Activity Type	Start Date/ End Date	08/01 Days	08/07 Days	08/14 Days	08/21 Days	08/28 Days	Monthly Totals
Work Loss	11/15/2021 - Open	5	5	5			15
<b>Totals</b>		5	5	5	0	0	15

Calculate Totals

4

Monthly Grand Total 15

1

2

3

Case Note

Spell Check

5

Save and Back to RETAIN Service Summary

Cancel

1. Enter the days worked during the weeks available
2. Click on “Calculate Totals”
3. Click “Calculate Totals”
4. Click “Save and Back to RETAIN Service Summary”

# TREATMENT GROUP

## THE “RETAIN SERVICE” TAB

Correspondence: Employer Communication  
Correspondence: Healthcare Provider Communication  
Correspondence: Participant Communication  
Correspondence: Workplace Professional Communication  
Healthcare Provider ID  
Meeting with Employer  
Meeting with Healthcare Provider  
Meeting with Other Party  
Received Ergonomic Assessment  
Received On-site Job Analysis  
Referral: Services Beyond RETAIN after 6 Months

Referred for Ergonomic Assessment  
Referred for On-site Job Analysis  
Referred to Non-RETAIN Services  
Workplace Accommodation: Accessible Comm/Assistive Technologies  
Workplace Accommodation: Modified Work Tasks  
Workplace Accommodation: Other  
Workplace Accommodation: Physical Change  
Workplace Accommodation: Policy Enhancements  
Workplace Accommodation: Technical Assistance  
Workplace Accommodations Unavailable

Capturing other “RETAIN Services” you provide to/for your participant  
If there is more than one service to capture, they need to be captured separately

*Example: If you performed four services by speaking to the (1) worker, (2) provider, and (3) employer then provided (4) technical assistance for work accommodations you will need to capture each services (4) individually. If you spoke to the employer and worker multiple times, each occurrence needs to be captured separately.*



# THE “RETAIN SERVICE” TAB

## SPECIAL NOTE

The first RETAIN Service on the case will include two additional questions

### Perceived Level of Engagement

\*Perceived Level of Healthcare Provider Engagement

\*Perceived Level of Employer Engagement

#### Healthcare Options

- Low Provider Engagement
- Medium Provider Engagement
- High Provider Engagement
- No Provider Engagement
- Person did not permit staff to contact healthcare provider

#### Employer Options

- Low Employer Engagement
- Medium Employer Engagement
- High Employer Engagement
- No Employer Engagement
- Person did not permit staff to contact employer


# TREATMENT GROUP

## CAPTURING THE HEALTHCARE PROVIDER ID

**Retain Service Summary**

Jenna A Smith Record ID 202015737  
Birth Date 05/25/1976

**Add Retain Service**

*Program Sequence	RETAIN Seq 1
*RETAIN Service	Healthcare Provider ID
*Healthcare Provider ID	55555
*Service Date	12/20/2021 
*Perceived Level of Healthcare Provider Engagement	Low provider engagement
*Perceived Level of Employer Engagement	Medium employer engagement

1. Select "Healthcare Provider ID" from the dropdown list
2. Enter the 5-digit Provider ID
3. Enter the date this information was made available to you
4. Select your perceived level of engagement from the participant's employer and healthcare provider
5. Click "Save"

# TREATMENT GROUP

## RETAIN SERVICE TAB: OTHER DATA


**Retain Service Summary**

John J Johnson Record ID 202014986  
Birth Date 02/26/1977

**Add Retain Service**

▪ **Program Sequence** RETAIN Seq 1

▪ **RETAIN Service** Correspondence: Healthcare Provider Communication

▪ **Service Date** 01/05/2021 

1. Select the specific service provided within the dropdown list
2. Enter the date that service took place
3. Click “Save”

# TREATMENT GROUP

## RETAIN SERVICE TAB: OTHER DATA

RETAIN Service	Program Sequence	Service Date *	Action
Correspondence: Employer Communication	RETAIN Seq 1	12/05/2021	Edit Delete
Correspondence: Participant Communication	RETAIN Seq 1	12/05/2021	Edit Delete
Workplace Accommodation: Modified Work Tasks	RETAIN Seq 1	12/02/2021	Edit Delete
Correspondence: Employer Communication	RETAIN Seq 1	12/01/2021	Edit Delete
Correspondence: Participant Communication	RETAIN Seq 1	12/01/2021	Edit Delete
Meeting with Employer	RETAIN Seq 1	12/01/2021	Edit Delete
Meeting with Healthcare Provider	RETAIN Seq 1	12/01/2021	Edit Delete
Received Ergonomic Assessment	RETAIN Seq 1	12/01/2021	Edit Delete
Received On-site Job Analysis	RETAIN Seq 1	12/01/2021	Edit Delete
Referred for Ergonomic Assessment	RETAIN Seq 1	11/20/2021	Edit Delete
Referred for On-site Job Analysis	RETAIN Seq 1	11/20/2021	Edit Delete
Correspondence: Participant Communication	RETAIN Seq 1	11/15/2021	Edit Delete
Healthcare Provider ID	RETAIN Seq 1	11/15/2021	Edit Delete

Each service you've entered will display on the RETAIN Service Summary screen.

**Federal Reporting Requirements:** Must report initial date, most recent date, and cumulative counts

## CASE NOTES

# TREATMENT GROUP

## Case Note Entry

- Information provided verbally by service providers about the case participation or progress
- Purpose of the contact, information provided, description of outcomes, and next steps
- Information on contacts with other program staff
- All Support Service and Training fund approvals
  - Documentation for each disbursement must be included, including cost to provider (not value of service)
  - Documentation must show how approval was consistent with local policy

# TREATMENT GROUP

## Communication and Contact

### How often do you need to communicate with your participant?

- Case managers need to attempt communication with their participants at least every 30 days
- The case manager needs to case note in the participant's Workforce One record at least every 30 days detailing the attempt to communicate and/or if there was live contact received from the participant
- If no live contact has occurred for 90 consecutive days, the case manager **MUST** exit the participant due to non-compliance with communication requirements

# TREATMENT GROUP

## Definition of LIVE CONTACT

### *One-to-one contact between the provider's staff and the participant*

- In-person conversation
- Telephone conversation (or voicemail from participant)
- Electronic message including email, text message (SMS), instant message (IM), or message sent via social media (e.g. Facebook, Twitter, etc.)
- Postal mail update from participant

*Mass emails and/or mass mailings are not case specific and will not fulfill the monthly contact requirement*



# TREATMENT GROUP

## Case Note Entry

Note Selected

- 90-Day Summary
- Action Plan
- Activity
- Application
- Appointment
- Apprenticeship
- Assessment
- Case Assignment/Transfer
- Child Care
- Closure/Exit
- Community Partner
- Computer/High Tech Tools
- Correspondence
- Counseling and Guidance
- Eligibility
- Employment/Service Plan
- Engagement
- Enrollment
- Financial/Billing
- Follow-up
- Information and Referral
- Information Release
- Intake
- Interviewing
- Job Referral
- Job Search
- Job Search Allowance
- Job/Employment

- Measurable Skills Gain
- Medical Report
- Non-Compliance
- On-the-Job Training
- Other
- Participation Hours
- Placement
- Planning
- Priority for Service
- Privacy Change
- Referral
- Relocation Allowance
- RTAA
- Session
- Social Services
- SSA Benefit Verification
- Start Sanction Process
- Support Service
- Technology
- Tools
- TRA
- Training
- Training Progress Report
- Transportation
- Tutoring
- Work Experience

### REMINDER

State and Federal Monitors will look at case notes to determine if data entry policies are being obeyed and services provided are justified

<ul style="list-style-type: none"> <li>Tickler</li> <li>Connect Messages</li> <li>Demographics</li> <li>Mobile User</li> <li>Work Preferences</li> <li>MN Works Resume</li> <li><b>Case Note</b></li> <li><b>Add Case Note</b></li> <li>Case Note Quick</li> <li>Case Note Search</li> <li><b>Cases</b></li> <li>Program/New App</li> <li>Eligibility/Enrollment</li> <li>Activity</li> <li>TAA</li> <li>Plan</li> <li>Credential</li> <li>Measurable Skills Gain</li> <li>Reporting Collection</li> <li>Youth Performance</li> <li>Exit</li> <li>Follow-Up</li> <li>Case Assignment</li> <li>Service Model</li> <li><b>EDS</b></li> <li>Add Document</li> <li>Add Multiple Documents</li> <li>Document Summary</li> <li><b>Service</b></li> <li>RETAIN Service</li> <li>Support Service</li> </ul>	<p><b>*Event Date</b> <input type="text" value="11/15/2021"/></p> <p><b>*Note Viewable By</b> <input type="text" value="All Staff in Servicing Agency"/></p> <p><b>Agency</b> Mayo Clinic</p> <p><b>*Program</b> <input type="text" value="RETAIN (Open)"/> Select/Deselect</p> <p><b>Staff Associated</b> <input type="text" value="Carlson, Amy"/></p> <p><b>Category</b> <input type="text" value="Employment/Service Plan"/> Select/Deselect</p> <p><b>Contact Method</b> <input type="text" value="Video"/></p> <p><b>Contact Type</b> <input type="text" value="Live Contact with Person"/></p> <p><b>*Status</b> <input type="text" value="Closed"/></p> <p><b>Subject</b> <input type="text" value="Plan Development"/></p> <p><b>*Note</b></p> <p>Participant and case manager completed the participant's employment plan. The plan was signed and dated by the participant and case manager on 12/10/2021. The participant was provided a copy of their employment plan, which details their employment goal, barriers to employment, steps to overcome their barriers with estimated achievement dates. The participant's main priority is to have their case manager facilitate communication with their employer in hopes of obtaining modified work tasks during the 4 weeks their doctor has restricted their number of hours allowed to stand during the day. Case Manager will begin working on scheduling meetings with the participant's supervisor, Jacob Anderson, to discuss possible accommodations. The original IEP has been placed into the participant's case file. Participant and case manager will continue to update the IEP as the participant progresses through the program. The dates of this IEP were entered into the "Plan" tab of this WF1 case record.</p> <p><input type="button" value="Spell Check"/> <input type="button" value="Save and Remain on Page"/> <input type="button" value="Save and Add New Case Note"/> <input type="button" value="Cancel"/></p>
---	--



**CASE NOTES**  
See Next Slide for Directions

# TREATMENT GROUP

## Case Notes

**Data Entry Timeliness policy located here:** <https://apps.deed.state.mn.us/ddp/PolicyDetail.aspx?pol=552>

### Instructions for Case Note Data Entry

1. Click “Add Case Note” within the side panel of the participant’s WF1 record
2. Enter the Event Date (date it occurred)
3. Select the staff the case note should be viewable
4. Select the “RETAIN” program
5. Select the staff associated with the event (automatically defaults to the WF1 user entering)
6. Select the Category of case note (high-level subject)
7. Select the Contact Method associated with the event
8. Select the Contact Type (who was involved in the event)
9. Change “Status” to Closed
10. Enter a brief subject title
11. Type an overview of the event, who was involved, what was discussed, timeframes decided, etc.
12. Click Spell Check and make corrections as needed
13. Click “Save”

# TREATMENT GROUP EXITING THE PARTICIPANT

# TREATMENT GROUP

## Program Exit Data Entry Timeliness

All participants must be exited from the RETAIN program no later than 6 Months following their RETAIN Enrollment Date

***All participant exits must be entered into WF1 no later than 192 days following the enrollment date***

**The Exit Date must be retroactive to the 182<sup>nd</sup> day**

# TREATMENT GROUP EXITING THE PARTICIPANT

1. Click on “Exit” in the side panel when you are ready to close the case
2. Once in the “Exit Summary” screen, click on “Exit Program Sequence”

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  
TAA  
Plan  
Credential  
Measurable Skills Gain  
Reporting Collection  
Youth Performance  
**Exit**  
Follow-Up  
Case Assignment

▼ Hide RETAIN Seq 1 - Enrolled

Activity(ies) to Be Closed	Funding Stream	Start Date	Staff: Agency	Staff Role
Employability Assess	Mayo RETAIN Phase 2	12/03/2021	Amy Carlson Mayo	Primary Staff
Job Readiness	Mayo RETAIN Phase 2	12/03/2021	Amy Carlson Mayo	Primary Staff
Indv Plan Dvpmt	Mayo RETAIN Phase 2	11/15/2021	Amy Carlson Mayo	Primary Staff
Assessment	Mayo RETAIN Phase 2	11/15/2021	Amy Carlson Mayo	Primary Staff
Career Counseling	Mayo RETAIN Phase 2	11/15/2021	Amy Carlson Mayo	Primary Staff

Funding Stream	Start Date	End Date
Mayo RETAIN Phase 2	11/15/2021	

Exit Program Sequence

# TREATMENT GROUP EXITING THE PARTICIPANT

## RETAIN Exit

Jenna Smith  
Birth Date 07/25/1976

Record ID 202015873

**Program Seq** 2  
**Agency: Location** Mayo Clinic: Mayo Clinic  
**Enrollment Date** 03/07/2022  
**Entered by** Arif Shahriar

\*Primary Exit Reason

None Selected ▼

None Selected

Did not Return to Work

Moved from Area

Returned to Different Job with Pre-Injury/Illness Empr

Returned to Pre-Injury/Illness Job

Returned to Work Different Empr, not Pre-Injury/Illness Empr

Workers Compensation (QRC) Assignment

Next Cancel

- Once in the Exit screen, click on the “Primary Exit Reason” field and choose the appropriate exit reason from the drop-down list that best fits the reason the participant’s case is closing
- Click on “Next”

# TREATMENT GROUP EXITING THE PARTICIPANT

## RETAIN Exit









Jenna A Smith  
Birth Date 07/25/1976

Record ID 202015680

**Program Seq** 1  
**Agency: Location** Mayo Clinic: Mayo Clinic  
**Enrollment Date** 11/15/2021  
**Entered by** Amy Carlson

\***Primary Exit Reason** Returned to Different Job with Pre-Injury/Illness Empr

Change Exit Reason

\***Exit Date** 12/20/2021   
\***Labor Force Status** Employed Full-Time   
\***Did the participant receive support services?** No   
\***Did the participant receive needs related payments?** No   
\***Disability Status** Yes, Disability Not Barrier to Employment   
\***Disability Category** Physical Impairment   
\***Employment Work Setting** Working in Competitive, Integrated Employment   
\***Referred to Other Services Beyond RETAIN** No 

Answer all  
questions within  
the Exit screen



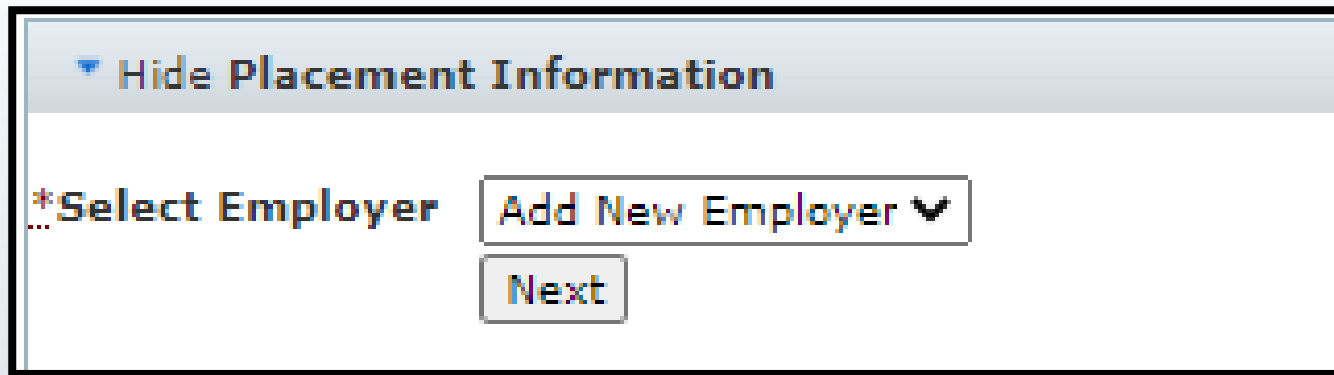
# TREATMENT GROUP EXITING THE PARTICIPANT

▼ Hide Activities

Activity: Subtype	Start Date	*Completion Result
Indv Plan Dvpmt	11/15/2021	Successful ▼
Assessment	11/15/2021	Successful ▼
Career Counseling	11/15/2021	Successful ▼
Employability Assess	12/03/2021	Successful ▼
Job Readiness	12/03/2021	Successful ▼

Close all activities that remain open with the appropriate completion result

# TREATMENT GROUP EXITING THE PARTICIPANT



Hide Placement Information

\*Select Employer

In the “Placement Information” section, click “Next”

# TREATMENT GROUP EXITING THE PARTICIPANT

▼ Hide Placement Information

**Employer 1**

Delete Placement

\*Empr Name IBM

Worksite Business Office

Empr Contact Jacob Anderson

Empr E-mail janderson@IBM.org

Address 1 3605 Highway 52 N, Rochester

Address 2

City Rochester \*State MN Zip 55901

County Olmsted Country United States

Phone Ext. Phone Type If other, please specify: TTY Video

(507) 253-4011 Work

Enter all known  
employment details

# TREATMENT GROUP EXITING THE PARTICIPANT

• Employer Industry (NAICS)

445120

- Convenience Stores

*Clear NAICS code for new search.*

Search/Validate NAICS

Select a NAICS from the below list and enter that code into the “Employer Industry (NAICS)”

- 212299 = Agriculture or Mining
- 236220 = Construction or Utilities
- 335999 = Manufacturing
- 445299 = Retail Trade, Wholesale Trade, or Transportation
- 519190 = Information
- 541219 = Finance or Real Estate
- 561110 = Professional, Management or Administrative Services
- 611710 = Education or Health Care
- 711410 = Accommodation and Food Services or Arts and Entertainment
- 811198 = Other Services
- 923120 = Public Administration

# TREATMENT GROUP EXITING THE PARTICIPANT

<b>*Occupational Title (O*NET)</b>	<input type="text" value="41-2011.00"/> - Cashiers
	<i>Clear O*NET code for new search.</i>
	<input type="button" value="Search/Validate O*NET"/>

**Enter one of the following ONET codes depending on the participant's employment at program exit**

- 11-9199.00 = Management, professional, or related
- 43-4051.00 = Service
- 41-9099.00 = Sales and office
- 47-4099.00 = Natural Resources, Construction, or maintenance
- 53-6099.00 = Production, transportation, or material moving

# TREATMENT GROUP EXITING THE PARTICIPANT

Job Title	Bookkeeper
Source of Job Lead	Networking ▼
*Job Sector	Private ▼
Job Duration	Permanent (150 days or More) ▼
*Job Start Date	12/20/2021 🇺🇸
*Hourly Wage	\$ 25 <input type="checkbox"/> Undisclosed
*Hours per Week	40
*Job is Training Related	Yes ▼
*Benefit Package	Yes ▼
Benefit Detail	<input checked="" type="checkbox"/> Dental <input checked="" type="checkbox"/> Health <input checked="" type="checkbox"/> Life <input type="checkbox"/> Other <input checked="" type="checkbox"/> Retirement <input checked="" type="checkbox"/> Vacation
If other, please explain:	<input type="text"/>
Select Second Employer	Add New Employer ▼ Next

- Enter as many details as possible on the participant's employment at time of exit
- If the participant is employed by more than one employment, click on "Next" under the "Add New Employer" dropdown list and repeat slides 103-106

# TREATMENT GROUP EXITING THE PARTICIPANT

Plan  
Credential  
Measurable Skills Gain  
Reporting Collection  
Youth Performance  
**Exit**  
Follow-Up  
Case Assignment  
Service Model

▼ Show **Activities**

▼ Show **Placement Information**

▼ Show **Case Note**

**Remove from caseload**

Save Final Exit   Save Exit as Pending   Cancel

- It is not recommended to remove your participant from your caseload until at least one year has gone by since their exit date. This allows case managers to easily find the participant's record in order to capture Supplemental Wage Information and other data after they exit from the RETAIN program. DO NOT CLICK "Remove from caseload"
- Click "Save Final Exit"

# TREATMENT GROUP EXITING THE PARTICIPANT

**Exit Summary**

Jenna A Smith Record ID 202015680  
Birth Date 07/25/1976

▾ Hide RETAIN Seq 1 - Exited

Exit Date 12/13/2021    Exit Reason Returned to Different Job with Pre-Injury/Illness Empr

Funding Stream	Start Date	End Date
Mayo RETAIN Phase 2	11/15/2021	12/20/2021

[View Exit](#)

**THE PARTICIPANT IS EXITED FROM THE RETAIN PROGRAM!**



# TREATMENT GROUP FOLLOW-UPS

# TREATMENT GROUP

## Follow-Up Data

Reasons to capture Follow-up details related to participant employment due to...

- The RETAIN reporting requirement to capture earnings during the 1<sup>st</sup> quarter prior to enrollment, the quarter of enrollment, and the 1<sup>st</sup> – 4<sup>th</sup> quarters following program enrollment. This data entry is especially important for participants employed by employers who are not required to report wages to the Unemployment Insurance Division.
- Performance Accountability of taxpayer funded programs. This data will be used to determine success rates of those programs administered by the Minnesota Department of Employment and Economic Development.
- State and local area management teams needing real time data to determine if case managers are sufficiently performing their job to assist participants in retaining their employment and/or if the case manager needs technical assistance.

# TREATMENT GROUP Follow-Up Data

The screenshot shows a software interface with a left sidebar and a main content area. The sidebar has several sections: 'Work Preferences' (with 'MN Works Resume' below it), 'Case Note' (with 'Add Case Note', 'Case Note Quick', and 'Case Note Search' below it), 'Cases' (with 'Program/New App', 'Eligibility/Enrollment', 'Activity', 'TAA', 'Plan', 'Credential', 'Measurable Skills Gain', 'Reporting Collection', 'Youth Performance', and 'Exit' below it), and 'Follow-Up' (highlighted with a red arrow labeled '1'). The main content area has a header 'Hide RETAIN Seq 1 - Exited' and the text 'No follow-ups found.' Below this text is a button labeled 'Add Follow-Up' (highlighted with a red arrow labeled '2').

1. Click on “Follow-Up” in the side panel of the participant’s case record
2. Click “Add Follow-up”

# TREATMENT GROUP Follow-Up

**RETAIN Follow-Up**

Jenna A Smith Record ID 202015680  
Birth Date 07/25/1976

**Program Seq** 1  
**Agency: Location** Mayo Clinic: Mayo Clinic  
**Enrollment Date** 11/15/2021  
**Entered by** Amy Carlson  
**Exit Date** 12/13/2021

**\*Contact Date**    
**\*Follow-Up Interval**    
**\*Contact Method**    
**Labor Force Status**  

**Comments**

Case Manager contacted participant to check in on how everything is going. Participant said everything is going well and she is still loving her new job. She again said thank you for all the assistance during the time she was ordered to have restricted work due to her injury.

Enter the date you performed the employment follow-up/check in, the follow-up interval, contact method, current employment status, and any additional information in the comment section

[Continue to next slide](#)

# TREATMENT GROUP

## Follow-Up

▼ Hide Employment Verification - IBM

Updated at	Job Title	Hourly Wage	Hours per Week	Benefits Package
Exit	Bookkeeper	\$25.00	40	Yes

\*Still employed at this employer?  Yes  No

Job Title

\*Hourly Wage \$   Undisclosed

\*Hours per Week

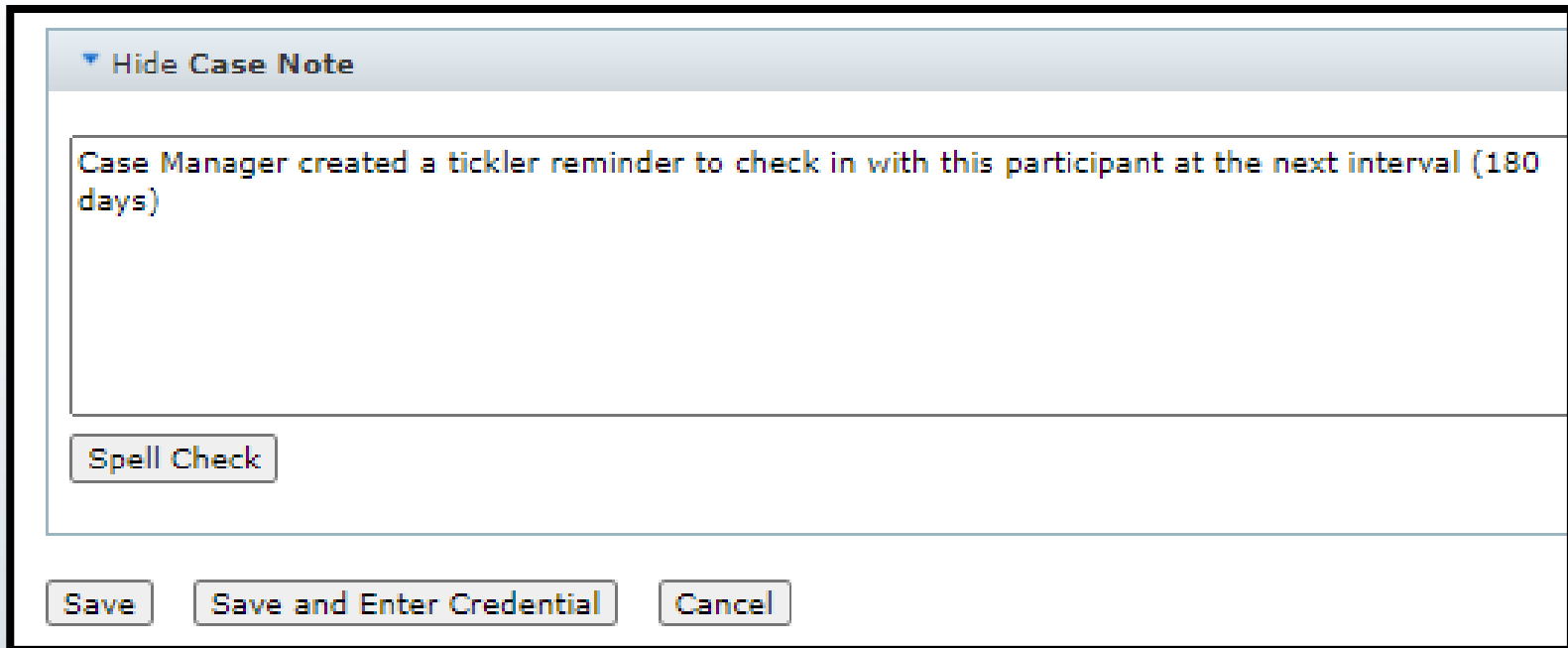
Benefit Package  ▼

Enter any known employment changes within the “Employment Verification” section of the Follow-up screen. If the participant has a new employer or any additional employment, click “Add New Employer” and enter its details now

[Continue to next slide](#)

# TREATMENT GROUP

## Follow-Up



The screenshot shows a software window with a title bar that says "Hide Case Note". Below the title bar is a large text area containing the text: "Case Manager created a tickler reminder to check in with this participant at the next interval (180 days)". Below the text area is a "Spell Check" button. At the bottom of the window are three buttons: "Save", "Save and Enter Credential", and "Cancel".

- Enter any case notes you want known on the case
- Example: Case manager created a tickler as a reminder to follow-up at the next interval
- Click “Save”

# TREATMENT GROUP Follow-Up Complete!

**Follow-Up Summary**

Jenna A Smith Record ID 202015680  
Birth Date 07/25/1976

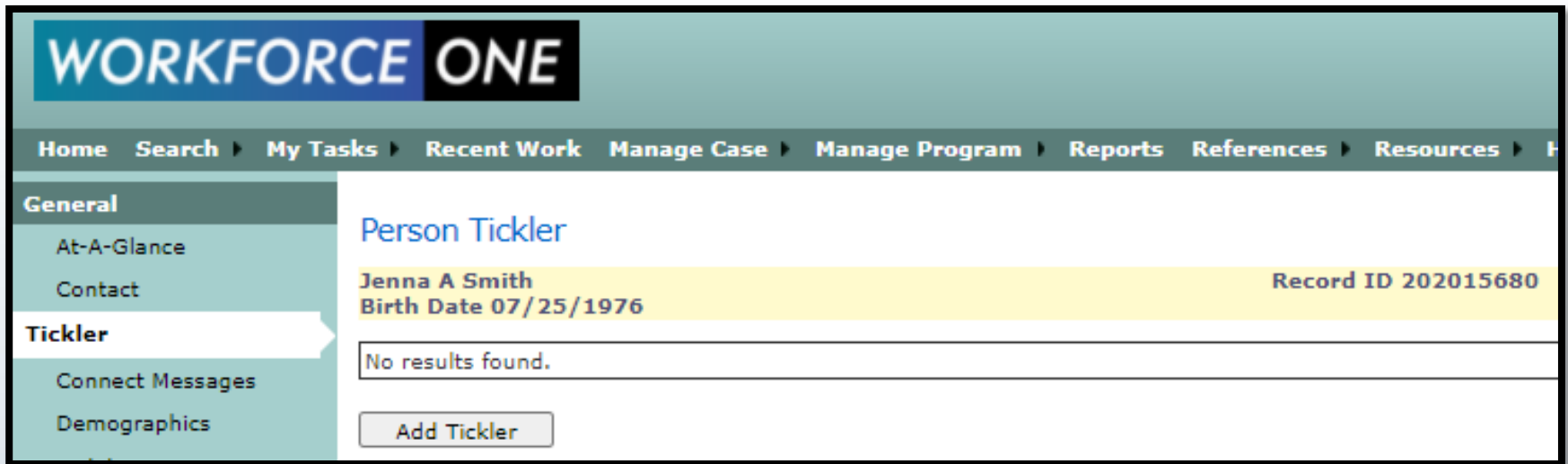
▼ Hide RETAIN Seq 1 - Exited

**Follow-Up Contacts**

Interval	Staff	Agency	Action
90 Day	Amy Carlson	Mayo	<a href="#">Edit</a> <a href="#">Delete</a>

- You can Edit or Delete if needed by clicking in the “Action” column
- You can add another Follow-up by clicking on “Add Follow-Up”

# TREATMENT GROUP TICKLERS



The screenshot displays the Workforce One interface. At the top, the logo 'WORKFORCE ONE' is visible. Below it is a navigation bar with links: Home, Search, My Tasks, Recent Work, Manage Case, Manage Program, Reports, References, Resources, and F. The main content area is titled 'Person Tickler' and shows details for 'Jenna A Smith' with a 'Record ID 202015680' and a 'Birth Date 07/25/1976'. A search box contains the text 'No results found.' and there is an 'Add Tickler' button below it. On the left side, a sidebar menu is open to the 'Tickler' option, with other options like 'General', 'At-A-Glance', 'Contact', 'Connect Messages', and 'Demographics'.

1. Click “Tickler” within the side panel of the case record
2. Click “Add Tickler” to create a reminder for something you want to be reminded of on a future date


(Tickers can be used during enrollment and after exit)



# TREATMENT GROUP TICKLERS

**Add Tickler**

**\*Recipient** Carlson, Amy ▼  
[Select/Deselect](#)

**\*Due Date** 06/26/2022 

**Tickler for** Smith, Jenna A ▼

**Program** RETAIN ▼

**\*Task**

160 day Follow-up Interval is due for 202015680

1. You can create a tickler for yourself, or other staff related to the case
2. Enter the date you want the tickler to alert you/them
3. Select the “RETAIN” program
4. Type the reminder details you want the tickler to remind you to perform on its due date
5. Click “Save”

# TREATMENT AND CONTROL GROUP WAGE COHORT CHART

# TREATMENT AND CONTROL GROUP WAGE COHORT

	Reporting Year	→	Enrollment Year 2021 (7/1/21 – 6/30/22)				Enrollment Year 2022 (7/1/22 – 6/30/23)				Enrollment Year 2023 (7/1/23 – 6/30/24)				Enrollment Year 2024 (7/1/24 – 6/30/25)				Enrollment Year 2025 (7/1/25 – 6/30/26)			
RETAIN PARTICIPANT ENROLLMENT QUARTER	Quarter Enrolled	→	Q1 Jul-Sep 2021	Q2 Oct-Dec 2021	Q3 Jan-Mar 2022	Q4 Apr-Jun 2022	Q1 Jul-Sep 2022	Q2 Oct-Dec 2022	Q3 Jan-Mar 2023	Q4 Apr-Jun 2023	Q1 Jul-Sep 2023	Q2 Oct-Dec 2023	Q3 Jan-Mar 2024	Q4 Apr-Jun 2024	Q1 Jul-Sep 2024	Q2 Oct-Dec 2024	Q3 Jan-Mar 2025	Q4 Apr-Jun 2025	Q1 Jul-Sep 2025	Q2 Oct-Dec 2025	Q3 Jan-Mar 2026	Q4 Apr-Jun 2026
Earnings in first quarter prior to enrollment	Reporting Quarter	→																				
Earnings in quarter of enrollment	Reporting Quarter	→																				
Earnings in first quarter after enrollment	Reporting Quarter	→																				
Earnings in second quarter after enrollment	Reporting Quarter	→																				
Earnings in third quarter after enrollment	Reporting Quarter	→																				
Earnings in fourth quarter after enrollment	Reporting Quarter	→																				

# TREATMENT AND CONTROL GROUP WAGE COHORT

**Directions on how to use this chart in order to find when a participant's wages will be reportable in quarter reports for the RETAIN Phase 2 program**

To find the quarter participants will have fully reported wage information based on the 6 full months allowed for Minnesota employers to report staff wages to the Unemployment Insurance Division located within Minnesota's Department of Employment and Economic Development

Follow the Enrollment Year's color in which you want date ranges on down to the individual indicator section then look up to find the quarter that indicator will be reported for that participant

# TREATMENT AND CONTROL GROUP WAGE COHORT

**Example:** If you want to know when "Earnings in first quarter prior to enrollment", will be reported for a participant who enrolled in RETAIN on October 15, 2022

1. Find the Enrollment Year that includes the date of 10/15/2022, which is found in the top line of this chart within the second section (in YELLOW) titled "Enrollment Year 2022"
2. Find the Enrollment Quarter that includes the date of 10/15/2022, which is found in the 2nd line of this chart within the 2nd square colored in YELLOW titled "Q2 Oct-Dec 2022"
3. Find the 2nd YELLOW square within the 3rd line of this chart and look directly above it to see the quarter this participant's wages prior to enrollment will report, which is will be "Q4 Apr-Jun 2023"
4. To find the quarter reports this participant will report wages for the remaining indicators, repeat step 3 by finding the 2nd YELLOW square within the remaining lines of this chart and following that square up to the quarter timeframe about it

# Performance Questions?



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