

## Data Roundtable Community of Practice (CoP)—Notes

**Facilitator: Christina Jones**

**December 1, 2022**

Christina facilitated CoP participant introductions using Jamboard, which involved an icebreaker on data visualizations that make no sense.

**Afterward, Christina handed over the presentation to Amy Carlson who led the group through Minnesota’s case management system.**

### Minnesota RETAINS Case Management Achievements

- During the pilot phase of Minnesota RETAIN, Amy was the only performance staff assigned to RETAIN. But now they have more staff support, including Arif Shahriar, a management analyst responsible for answering data entry questions, reporting data errors, and writing quarterly reports. Usha Valappil is the evaluation liaison. Usha is responsible for evaluation case management and tracking CQI.
- Since November 10, 2022, Minnesota RETAIN has served participants in 184 different cities in 54 counties. Minnesota RETAIN has enrolled 269 treatment group participants and 264 control group participants.
- RETAIN Workforce Services is a service provider that functions as a one-stop service. If a healthcare center or an employer are not working with a participant, if the participant needs a change of careers, or if the participant needs job shadowing opportunities, then they will be co-enrolled in RETAIN Workforce Services. To date, 59% of participants are co-enrolled in RETAIN Workforce Services.

### Workforce One Presentation

- Minnesota has two case management websites: the official site and a sandbox site. For Phase 2, RETAIN was created as a core program in the database. The sandbox is very similar to the official site. Many users have multiple profiles for Workforce One depending on their role.
- Workforce One has robust search features in which users can search by person, look at saved searches, conduct a TAA worker search, search by user, and run reports on how many counselors are doing data.
- A new cell phone application is now connected to Workforce One. The participant can use the app to take pictures of the documents their counselor needs and send the files directly to Workforce One.

- Counselors can set up reminders and alerts for check-ins.
- Workforce One has many reports available along with a reports function that allows local areas to run their own reports whenever they want to. The application can generate 60 different reports with descriptions of what they are for. Activity details and summaries are the most popular reports. These reports are useful because local boards and others utilize these reports.
- Workforce One provides a list of services that are available along with definitions. If a counselor has a participant coming to talk about employment, the counselor can open the activity to make sure they are providing the appropriate service.
- Workforce One provides activity definitions and performance types, which helps users keep track of the performance indicators regarding training. Users can search by exit reasons and use a data dictionary. In addition, the help panel feature assists the user to understand what they are seeing.
- To begin a data entry, typically the user would do a search by Social Security Number. If that person is not in the system, then the user would then create a shell record in which they input as much information as possible for the new entry.
- Workforce One has an “at a glance” function that conveys what program participants are enrolled in. Counselors can enter them into programs by starting a new application. Counselors can also assign support staff for this participant. To determine eligibility for RETAIN, fields can be filled out.
- Question: A participant asked, “Does this happen after randomization into the treatment group?”
  - The procedure is first to meet with the individual to screen them for eligibility and then randomize and then do data entry into Workforce One. The confirmation is done first.
- The same participant then asked, “What is the ratio for referral after screening regarding eligible vs. ineligible?”
  - Minnesota tries hard to track data prior to enrollment. A lot of work is done upfront before the initial work to determine eligibility after screening. Although Minnesota does not have the ratio on hand, they can provide that number in a follow-up.
- Some fields in Workforce One have select/deselect, which indicates they are multiple-choice options. For example, it is easier to pick the core problems someone may be facing. Minnesota uses a smaller list of core problems rather than the larger ICD10 code list. However, Minnesota maps the core problems back to the ICD10 codes on the back end.
- Activities in Workforce One are essentially services. When someone opens an activity, they indicate that it is a service that they are providing. A few activities are available upon enrollment, such as an employability assessment.
- Workforce One has a recent work tab so users can look back at what cases they have been working on rather than start over with the search feature, which can be more time

consuming. If users have a case note, they can record those and add them. Counselors can track dead cases, which are defined as 3 months of no communication.

- Minnesota RETAIN captures a lot of information under the RETAIN service tab, such as employer and healthcare communication and provider IDs. On this tab, users can add RETAIN services that can be edited or deleted. Multiple services can be added. Private information or health information is not shared. This tab can capture any work loss or restrictions.
- A participant from Vermont stated it was great to take an in-depth look at another state's system.
- Minnesota will share activity definitions to show the different services, and will send the counselor user guide that was created, which gives step by step demonstrations on what Minnesota just provided.