



## Community Partner Access in WF1 Desk Aid

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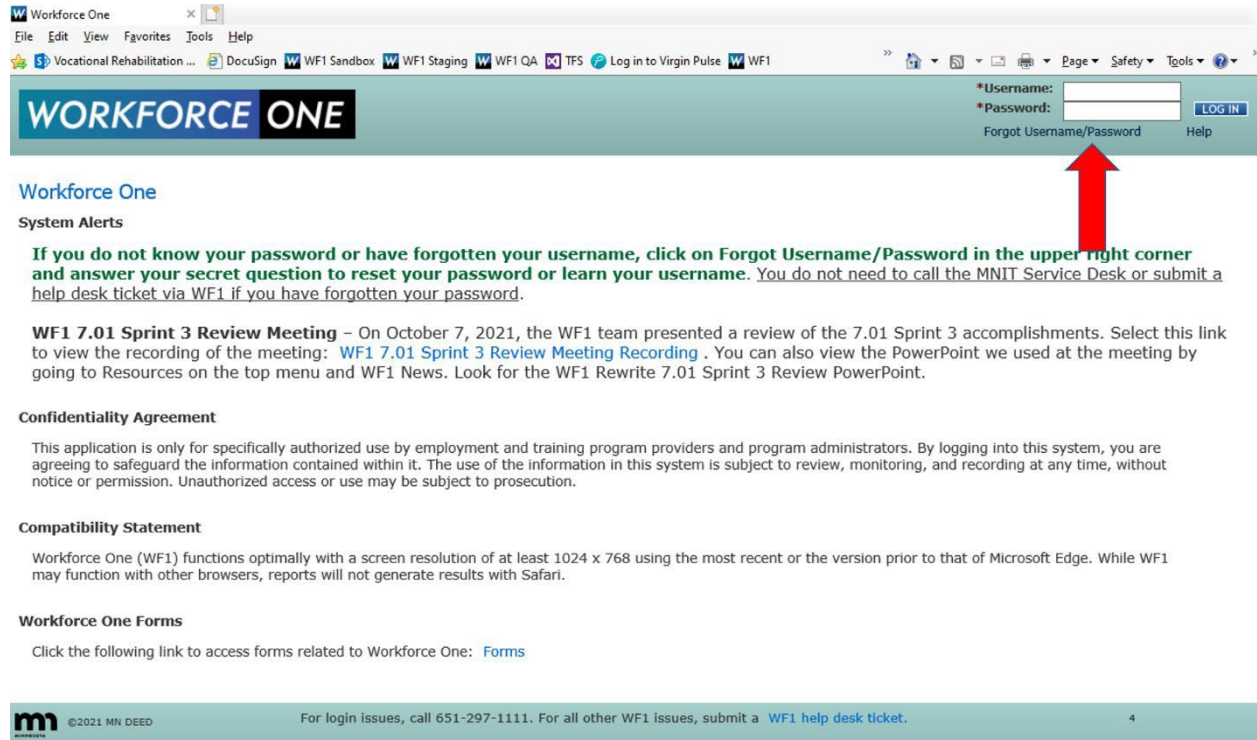
If you have specific questions about WF1 please contact  
Susan Kusz [susan.kusz@state.mn.us](mailto:susan.kusz@state.mn.us)

## Logging in to WF1

Go to the following website <https://www.mnworkforceone.com>

Enter the username and password provided by the VRS security administrator. Click **“LOG IN”**.

If you can't remember your username or password, click the **“Forgot Username/Password”** link. WF1 will walk you through the steps to either obtain your username or reset your password.



The screenshot shows a web browser window with the title 'Workforce One'. The address bar shows the URL 'https://www.mnworkforceone.com'. The page has a teal header with the 'WORKFORCE ONE' logo on the left and a login form on the right. The login form includes fields for '\*Username:' and '\*Password:', a 'LOG IN' button, and a link for 'Forgot Username/Password'. A red arrow points to this link. Below the header, the page content includes 'System Alerts', a green alert message about password resets, a meeting announcement for 'WF1 7.01 Sprint 3 Review Meeting', a 'Confidentiality Agreement' section, a 'Compatibility Statement' section, and a 'Workforce One Forms' section with a link to 'Forms'. The footer contains the MN logo, copyright information, login support details, and a page number '4'.

Workforce One

System Alerts

**If you do not know your password or have forgotten your username, click on [Forgot Username/Password](#) in the upper right corner and answer your secret question to reset your password or learn your username. You do not need to call the MNIT Service Desk or submit a help desk ticket via WF1 if you have forgotten your password.**

**WF1 7.01 Sprint 3 Review Meeting** – On October 7, 2021, the WF1 team presented a review of the 7.01 Sprint 3 accomplishments. Select this link to view the recording of the meeting: [WF1 7.01 Sprint 3 Review Meeting Recording](#). You can also view the PowerPoint we used at the meeting by going to Resources on the top menu and WF1 News. Look for the WF1 Rewrite 7.01 Sprint 3 Review PowerPoint.

**Confidentiality Agreement**


This application is only for specifically authorized use by employment and training program providers and program administrators. By logging into this system, you are agreeing to safeguard the information contained within it. The use of the information in this system is subject to review, monitoring, and recording at any time, without notice or permission. Unauthorized access or use may be subject to prosecution.

**Compatibility Statement**

Workforce One (WF1) functions optimally with a screen resolution of at least 1024 x 768 using the most recent or the version prior to that of Microsoft Edge. While WF1 may function with other browsers, reports will not generate results with Safari.

**Workforce One Forms**

Click the following link to access forms related to Workforce One: [Forms](#)

 ©2021 MN DEED For login issues, call 651-297-1111. For all other WF1 issues, submit a [WF1 help desk ticket](#). 4

## Dashboard

After logging into WF1 this is the screen that will display. This is called the dashboard and it will display all the records that are assigned to your caseload.

The dashboard displays the person's name, program, case status and the activity status.

Staff will be able to access records by clicking on the person's name via the dashboard.

If the record does not display on the dashboard, Community Partner staff need to contact VRS staff and the VRS staff will add the partner staff to the case assignment.

WORKFORCE ONE

Logged in as: pprovider - VRS: User:   
 Change Password My Preference

Home Search My Tasks Recent Work Reports References Resources Help

Dashboard

System Alerts

This is QA.

My Info  
 9 Tickler(s) past due  
 No Ticklers due today  
 No Appointments today

Previous successful login was at 01/20/2023 12:44 PM  
☒ Include Exited Cases

Hide Current Caseload

Show 25 100 200 500  
 Displaying 1 to 8 of 8

Name	Record ID	Program	Case Status: Role	Residential County	Latest Open Activity Assigned to You/Days Open	Last Case Note	Earliest Tickler Date
Berry, Blue	202037997	VRS	Accepted for Services: Secondary	Ramsey	No Open Activity	05/17/2022 Placement Plan Meeting - Internal Staff by Alex Breiland	10/26/2022 by Blue Berry
Berry, Cran	201833393	VRS	Accepted for Services: Secondary	Houston	No Open Activity	12/15/2022 Correspondence by Laura Cheney	11/18/2022 by Cran Berry
Berry, Goji	202020799	VRS	Accepted for Services: Secondary	Olmsted	No Open Activity	11/10/2022 Eligibility by John Dufner	No Ticklers Due
Berry, Razz M	201810131	VRS	Exited: Secondary	Ramsey	No Open Activity	06/07/2022 Correspondence by Amber McCort	No Ticklers Due
Berry, Straw	202102360	VRS	Pre-ETS Referral: Secondary	Ramsey	No Open Activity	06/01/2022 Attempted Contact Correspondence by Susan Fox	10/26/2022 by Straw Berry

## Person Search

Partner staff can search for participants where they have been added to the case assignment.

From the top navigation click **“Search – Person”** and the following screen will appear:

**WORKFORCE ONE**

Logged in as: provider - VRS: User: LJA  
Change Password My Preferences

Home Search **My Tasks** Recent Work Reports References Resources Help

Person

Dashboard Advanced Search

System All User

Authorization

This Payment Agency

My Info

9 Tickler(s) past due  
No Ticklers due today  
No Appointments today

Previous successful login was at 01/20/2023 12:44 PM  
☒ Include Exited Cases

Hide Current Caseload

Show 25 100 200 500  
Displaying 1 to 8 of 8

Name	Record ID	Program	Case Status: Role	Residential County	Latest Open Activity Assigned to You/Days Open	Last Case Note	Earliest Tickler Date
Berry, Blue	202037997	VRS	Accepted for Services: Secondary	Ramsey	No Open Activity	05/17/2022 Placement Plan Meeting - Internal Staff by Alex Breiland	10/26/2022 by Blue Berry
Berry, Cran	201833393	VRS	Accepted for Services: Secondary	Houston	No Open Activity	12/15/2022 Correspondence by Laura Cheney	11/16/2022 by Cran Berry
Berry, Goji	202020799	VRS	Accepted for Services: Secondary	Olmsted	No Open Activity	11/10/2022 Eligibility by John Dufner	No Ticklers Due
Berry, Razz M	201810131	VRS	Exited: Secondary	Ramsey	No Open Activity	06/07/2022 Correspondence by Amber McCort	No Ticklers Due

**WORKFORCE ONE**

Logged in as: pprovider - VRS: User:   
 Change Password My Prefer

Home Search ▶ My Tasks ▶ Recent Work Reports References ▶ Resources ▶ Help

Person Search

▼ Hide Search Criteria

Last Name

First Name

Middle Initial

Record ID

Staff Assigned

Run Search

▼ Show Search Results

Populate either the **Last Name** or **Record ID** of the participant and then click **“Run Search”**. Partner staff also can search for participants assigned to other staff that work for that specific community partner by selecting the appropriate staff person from the Staff Assigned drop down menu.

When searching by Record ID it will bring up results for that specific record, example below.

**WORKFORCE ONE**

Logged in as: pprovider - VRS: User:   
 Change Password My Prefer

Home Search ▶ My Tasks ▶ Recent Work Reports References ▶ Resources ▶ Help

Person Search

▼ Hide Search Criteria

Last Name

First Name

Middle Initial

Record ID

Staff Assigned

Run Search

▼ Hide Search Results

Show 25 100 200 500   
 Displaying 1 to 1 of 1

Name: Birth Date ▼	SSN	Record ID	City	Current Staff Assigned
Berry, Blue 07/29/2000	7880	202037997	St. Paul	Nett, Michael J Provider, Paul

New Search Refine Search

## Ticklers

Ticklers are notifications that are either generated by WF1 or by individual staff. WF1 is programmed to create a notification to partner staff when VRS staff have completed a Referral Form or an Authorization and the partner staff have been added to the case assignment.

The Dashboard will indicate if there are new or past due Ticklers.

The screenshot shows the WORKFORCE ONE dashboard. At the top, it says "WORKFORCE ONE" and "Logged in as: pprovider - VRS: User". Below the navigation bar, the "Dashboard" section is visible. Under "System Alerts", it says "This is QA." and "My Info". In the "My Info" section, it displays "9 Tickler(s) past due", "No Ticklers due today", and "No Appointments today". A red arrow points to the "9 Tickler(s) past due" text. To the right, it shows "Previous successful login was at 01/26/2023 11:06 AM" and a checkbox for "Include Exited Cases". At the bottom, there is a "Hide Current Caseload" button and a "Show" dropdown menu with options 25, 100, 200, and 500, and a "Displaying 1 to 8 of 8" indicator.

Click the link and the following screen will appear:

The screenshot shows the WORKFORCE ONE "Tickler Search" results page. It features a table with the following columns: Select, Due Date, Sender, Recipient, Name, Program, Task, and Action. The table contains 9 rows of tickler data. Below the table, there are buttons for "Delete Selected", "New Search", "Refine Search", and "Add Tickler".

Select	Due Date	Sender	Recipient	Name	Program	Task	Action
<input type="checkbox"/>	10/26/2022	System	Provider, Paul	Berry, Blue (202037997)	VRS	Authorization 5323100013 has been issued by VRS staff. Please go to the Authorization link to view the authorization.	Delete Edit
<input type="checkbox"/>	10/26/2022	System	Provider, Paul	Berry, Straw (202102360)	VRS	Authorization 5323100015 has been issued by VRS staff. Please go to the Authorization link to view the authorization.	Delete Edit
<input type="checkbox"/>	10/26/2022	System	Provider, Paul	Berry, Blue (202037997)	VRS	Universal Referral has been completed by VRS staff. Please go to the Referral Form link to view the referral.	Delete Edit
<input type="checkbox"/>	10/26/2022	System	Provider, Paul	Berry, Straw (202102360)	VRS	Pre-ETS Referral has been completed by VRS staff. Please go to the Referral Form link to view the referral.	Delete Edit
<input type="checkbox"/>	11/02/2022	System	Provider, Paul	Bune, Alah (202153598)	VRS	Pre-ETS Referral has been completed by VRS staff. Please go to the Referral Form link to view the referral.	Delete Edit
<input type="checkbox"/>	11/18/2022	System	Provider, Paul	Berry, Cran (201833393)	VRS	Invitation to Placement has been completed by VRS staff. Please go to the Referral Form link to view the referral.	Delete Edit
<input type="checkbox"/>	11/18/2022	System	Provider, Paul	Berry, Cran (201833393)	VRS	Invitation to Placement has been completed by VRS staff. Please go to the Referral Form link to view the referral.	Delete Edit
<input type="checkbox"/>	11/18/2022	System	Provider, Paul	Berry, Cran (201833393)	VRS	Pre-ETS Referral has been completed by VRS staff. Please go to the Referral Form link to view the referral.	Delete Edit
<input type="checkbox"/>	11/18/2022	System	Provider, Paul	Berry, Cran (201833393)	VRS	Pre-ETS Referral has been completed by VRS staff. Please go to the Referral Form link to view the referral.	Delete Edit

This will identify all new referrals and authorizations created. Partner staff can click on the Participant Name to get to the record. Once partner staff have reviewed the Referral or Authorization, they should Delete the tickler. To Delete the Tickler, click **“Delete”** in the Action column.

## Referrals

After VRS staff complete a referral in WF1 a tickler is generated to the Community Partner staff that were added to the case assignment.

To view a referral, on the left navigation click **“Referral Form”**

The following screen will appear:

WORKFORCE ONE Logged in as: pa

Home Search ▶ My Tasks ▶ Recent Work Reports References ▶ Resources ▶ Help

**General**

**At-A-Glance**

Tickler

MN Works Resume

**Case Note**

Add Case Note

Case Note Quick

Case Note Search

**Cases**

Case Assignment

**EDS**

Add Document

Add Multiple Documents

Document Summary

**Service**

Authorization

Payment

**Form/Letter/Schedule**

Referral Form

**Person At-A-Glance**

Happy Gilmore Record ID 202155761

**Name** Happy Gilmore

**Record ID** 202155761

Program	Status	Application Date	Accepted for Services Date	Exit Date	Closed from App Date	Last Follow-up Date
VRS Seq 1	Accepted for Services	12/05/2022	01/13/2023			







## EDS (Electronic Document Storage)

To view documents that VRS staff have indicated can be shared with Community Partner staff, using the left navigation, click **“Document Summary”**

WORKFORCE ONE Logged in as: pa

Home Search ▶ My Tasks ▶ Recent Work Reports References ▶ Resources ▶ Help

**General**

**At-A-Glance** Person At-A-Glance

Happy Gilmore Record ID 202155761

**Name** Happy Gilmore  
**Record ID** 202155761

Program	Status	Application Date	Accepted for Services Date	Exit Date	Closed from App Date	Last Follow-up Date
VRS Seq 1	Accepted for Services	12/05/2022	01/13/2023			

**Case Note**

Add Case Note  
Case Note Quick  
Case Note Search

**Cases**

Case Assignment

**EDS**

Add Document  
Add Multiple Documents  
Document Summary

**Service**

Authorization  
Payment

**Form/Letter/Schedule**

Referral Form

following screen will appear:

The

WORKFORCE ONE

Logged in as: pal

Home Search My Tasks Recent Work Reports References Resources Help

General

At-A-Glance

Tickler

MN Works Resume

Case Note

Add Case Note

Case Note Quick

Case Note Search

Cases

Case Assignment

EDS

Add Document

Add Multiple Documents

Document Summary

Service

Authorization

Payment

Form/Letter/Schedule

Referral Form





Document Summary

Happy Gilmore

Record ID 202155761

Show Filter Criteria

Hide VRS Seq 1 - Accepted for Services

Document Name: User Defined Document Name	EDS Document Type	Uploaded Date	Document Date: Received Date	Format	Cmt Added	Action
Invoice Support Docs 5323100223 Goodwill Placement Plan 5-10-2023	VRS - Financial - Bills, Expenses	05/26/2023 01:44:18 PM			No	Tags and Comments
PBA - Plan Milestone 5323100223 Goodwill Signed Placement Plan 5-10-2023	VRS - Vendor, Provider Reports	05/26/2023 01:34:38 PM			No	Tags and Comments Delete
Resume 5-10-2023	VRS - Employment	05/10/2023 03:16:46 PM			No	Tags and Comments
Job App Sample Application	VRS - Employment	05/10/2023 03:16:21 PM			No	Tags and Comments

Add VRS Document

The Document Summary shows the documents available to view. Each document is given a User Defined Document Name which indicates what the document is.

To view the document either click the Document Name listed in blue or click on the icon under the Format column.

## Authorizations

After VRS issue an authorization in WF1 a tickler is generated to the Community Partner staff that were added to the case assignment.

To view authorizations that VRS staff have created to the Community Partner, using the left navigation, click **“Authorization”**

**WORKFORCE ONE** Logged in as: pa

Home Search ▶ My Tasks ▶ Recent Work Reports References ▶ Resources ▶ Help

**General**

**At-A-Glance** Person At-A-Glance

Happy Gilmore Record ID 202155761

**Name** Happy Gilmore  
**Record ID** 202155761

Program	Status	Application Date	Accepted for Services Date	Exit Date	Closed from App Date	Last Follow-up Date
VRS Seq 1	Accepted for Services	12/05/2022	01/13/2023			

**Case Note**

Add Case Note  
Case Note Quick  
Case Note Search


**Cases**

Case Assignment

**EDS**

Add Document  
Add Multiple Documents  
Document Summary

**Service**

Authorization   
Payment

**Form/Letter/Schedule**

Referral Form

The following screen will appear:

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WORKFORCE ONE

Logged in as: pau

[Home](#)
[Search](#)
[My Tasks](#)
[Recent Work](#)
[Reports](#)
[References](#)
[Resources](#)
[Help](#)

General

At-A-Glance

Tickler

MN Works Resume

Case Note

Add Case Note

Case Note Quick

Case Note Search

Cases

Case Assignment

EDS

Add Document

Add Multiple Documents

Document Summary

Service

Authorization

Payment

Form/Letter/Schedule

Referral Form

Authorization Summary

Happy Gilmore

Record ID 202155761

Show Filter Criteria

Hide VRS Seq 1 - Accepted for Services

Total Expended Amount

\$0.00

Total Pending Payment Amount

\$0.00

Auth Number	Service Title	Vendor	Issue Date	Start Date End Date	Auth Amount	Auth Status	Action
5323100223	1. Signed Placement Plan Meeting (\$1,330); 2. Employment First Shift Completed (\$1,200); 3. Successful Placement Closure (\$1,270)	Goodwill Easter Seals	05/10/2023	05/10/2023 09/30/2023	\$3,800.00	Issued	<a href="#">New Pay Reprint</a>

Any authorization that VRS created to the Community Partner will display.

Click the “**Reprint**” link in the Action column and the following screen will appear:

**WORKFORCE ONE** Logged in as: pau

Home Search ▶ My Tasks ▶ Recent Work Reports References ▶ Resources ▶ Help

**General**

- At-A-Glance
- Tickler
- MN Works Resume

**Case Note**

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

**Cases**

- Case Assignment

**EDS**

- Add Document
- Add Multiple Documents
- Document Summary

**Service**

- Authorization
- Payment

**Form/Letter/Schedule**

- Referral Form

**Print Launch**

[Open PDF](#) [Back to Authorization Summary](#)

1 of 1

State of Minnesota Department of Employment and Economic Development  
Vocational Rehabilitation Services

**Copy**

**Purchasing Authorization**

This Purchasing Authorization is for:		For the following services or goods:	
Record ID:	202155761	Authorization/ Purchase Order:	5323100223 /
Name:	Happy Gilmore	Issue Date:	05/10/2023
		Service Dates:	05/10/2023 - 09/30/2023
Service Vendor:		Remit To Vendor:	
Goodwill Easter Seals 553 FAIRVIEW AVE N ST PAUL, MN 55104		Goodwill Easter Seals 553 FAIRVIEW AVE N ST PAUL, MN 55104	
SWIFT ID: 0000213602001		SWIFT ID: 0000213602001	
E-mail: WDEWELL@GOODWILLEASTERSEALS.ORG.xx			

**BEFORE** providing services or goods costing more than "Total Price" per line or "Total Purchase Amount" OR that are beyond service dates, check with staff listed below for approval.

Purchase Information: Authorized by: Laura J Cheney

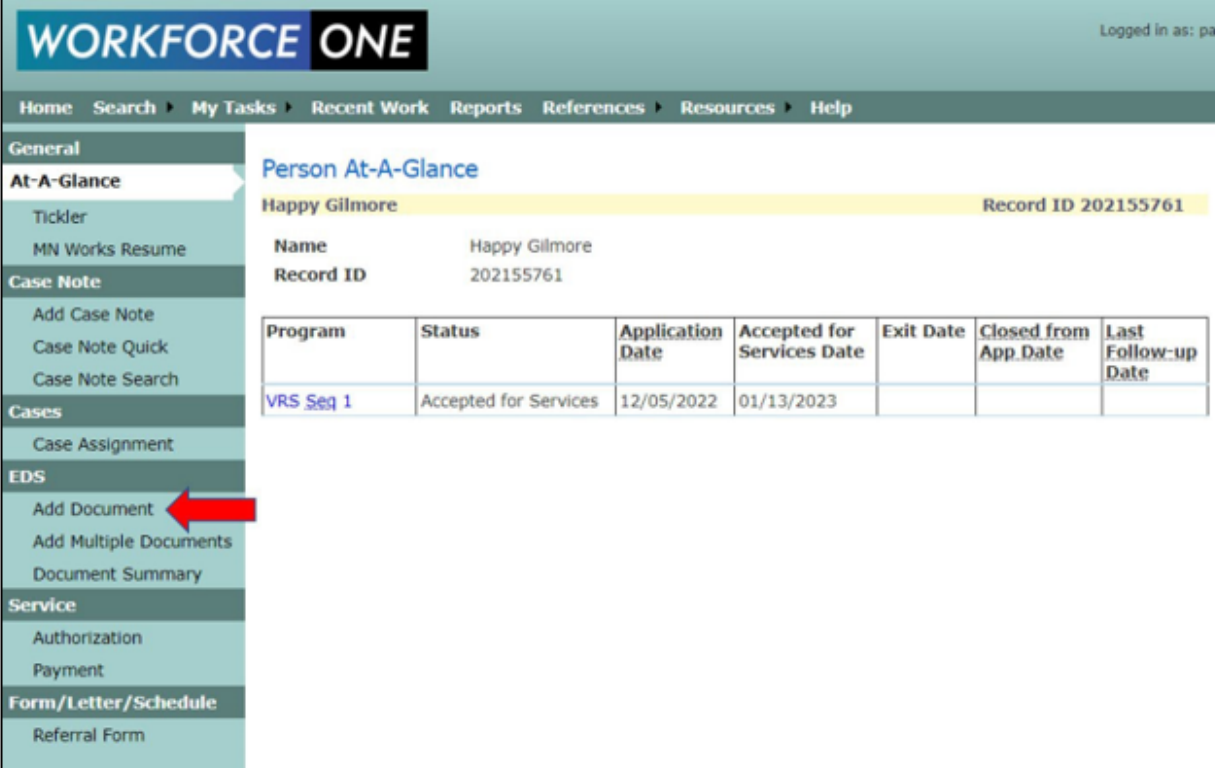
# of Units: UOM	Description	Service Type: Title	Unit Price	Total Price
1.00 EACH	Signed Placement Plan	Job Placement Services -General PBA: 1. Signed Placement Plan Meeting (\$1,330)	\$1,330.000	\$1,330.00
1.00 EACH	Employment First Shift Completed	Job Placement Services -General PBA: 2. Employment First Shift Completed (\$1,200)	\$1,200.000	\$1,200.00
1.00 EACH	Successful Placement Closure	Job Placement Services -General PBA: 3. Successful Placement Closure (\$1,270)	\$1,270.000	\$1,270.00
<b>Total Purchase Amount</b>				<b>\$3,800.00</b>

Community Partner staff can review the authorization directly from WF1 or click the **"Open PDF"** button and the page will open in a pdf format that Community Partner staff can view or print.

## Adding a Document to EDS

The preferred document format when uploading to EDS is a pdf file. This is to preserve the integrity of the document. PDF's offer security to the partner and are designed so that they cannot simply be edited whereas a word document could.

Community Partner staff will add reports and other documents into WF1 using the left navigation, click **"Add Document"**



**WORKFORCE ONE** Logged in as: pa

Home Search ▶ My Tasks ▶ Recent Work Reports References ▶ Resources ▶ Help

**General**

**At-A-Glance** Person At-A-Glance

Happy Gilmore Record ID 202155761

Name Happy Gilmore

Record ID 202155761

Program	Status	Application Date	Accepted for Services Date	Exit Date	Closed from App Date	Last Follow-up Date
VRS Seq 1	Accepted for Services	12/05/2022	01/13/2023			

**Case Note**

Add Case Note


Case Note Quick

Case Note Search

**Cases**

Case Assignment

**EDS**

Add Document 

Add Multiple Documents

Document Summary

**Service**

Authorization

Payment

**Form/Letter/Schedule**

Referral Form

The following screen will appear:



Document Add

Happy Gilmore Record ID 202155761

Program Seq VRS Seq 1 (Accepted for Svcs)

\*EDS Document Type None Selected

\*Document Name Select EDS Document Type to populate

\*Select a File Choose File No file chosen

Next Cancel

Help

**“EDS Document Type”**: select from the drop-down menu (a desk aid has been created to indicate which documents belong to which document type).

**“Document Name”**: select from the drop-down menu

Click **“Choose File”** to add the file that is saved to your computer

Click **“Next”** and the following screen will appear:

Document Add

Happy Gilmore
Record ID 202155761

Program Seq

VRS Seq 1 (Accepted for Svcs)

\*EDS Document Type

Vendor, Provider Reports

Selected File

5323100223 Goodwill Signed Placement Plan 5-10-2023.pdf

Change Program, Document Type or File

\*Agency

Goodwill-Easter Seals

\*Staff Associated

Partner, Paul

\*Document Name

PBA - Placement Plan, Communication, Milestone Reports

☐ Use file name as User Defined Document Name

User Defined Document Name

Folder

Section D - Evaluation/Progress Records

Privacy Level

Staff Assigned to Case in Any Agency

Send Tickler To

None Selected

Can Share with Person

Yes

Received Date

Document Date

Signed Date

Expiration Date

Reason for Collecting

None Selected

Select/Deselect

User Defined Date 1

User Defined Date 2

User Defined Tag 1

User Defined Tag 2

**“User Defined Document Name”:** This is a field staff can type information to help identify what the document is. If staff save the document to their computer as indicated on the desk aid, then click the box next to “Use file name as User Defined Document Name”

Best practice is to name the document as follows:

Authorization Number, Agency, Service, Dates

Ex. 5323100223 Goodwill Signed Placement Plan 5-10-2023

Once those fields are complete click **“Upload”**

WORKFORCE ONE

Logged in as: paul

Home Search My Tasks Recent Work Reports References Resources Help

General

At-A-Glance

Tickler

MN Works Resume

Case Note

Add Case Note

Case Note Quick

Case Note Search

Cases

Case Assignment

EDS

Add Document

Add Multiple Documents

Document Summary

Service

Authorization

Payment

Form/Letter/Schedule

Referral Form




Document Summary

Happy Gilmore

Record ID 202155761

Show Filter Criteria

Hide VRS Seq 1 - Accepted for Services

Document Name: User Defined Document Name	EDS Document Type	Uploaded Date	Document Date: Received Date	Format	Cmt Added	Action
PBA - Plan Milestone 5323100223 Goodwill Signed Placement Plan 5-10-2023	VRS - Vendor, Provider Reports	05/26/2023 01:34:38 PM			No	Tags and Comments Delete
Resume 5-10-2023	VRS - Employment	05/10/2023 03:16:46 PM			No	Tags and Comments
Job App Sample Application	VRS - Employment	05/10/2023 03:16:21 PM			No	Tags and Comments

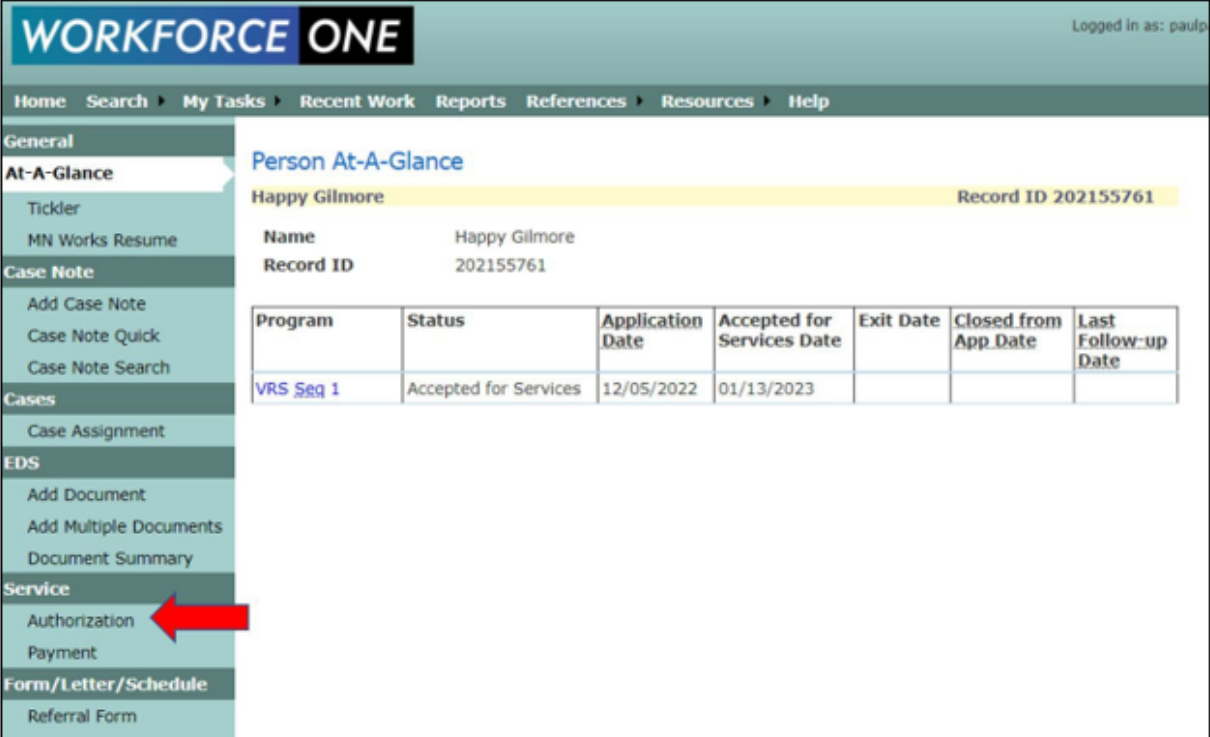
Add VRS Document

The document has now been added to the record and will be displayed on the Document Summary page.

Community Partner staff are strongly encouraged to click on the pdf icon to be sure the document is attached to the correct record in WF1. If the document is not correct staff can click **"Delete"** and this will delete the document from the record.

## Adding an Invoice

When the Community Partner staff is ready to invoice VRS, Community Partner staff will upload the invoice to WF1. Using the left navigation, click **“Authorization”**



**WORKFORCE ONE** Logged in as: paulp

Home Search ▶ My Tasks ▶ Recent Work Reports References ▶ Resources ▶ Help

**General**

**At-A-Glance** ▶ **Person At-A-Glance**

Happy Gilmore Record ID 202155761

**Name** Happy Gilmore  
**Record ID** 202155761

Program	Status	Application Date	Accepted for Services Date	Exit Date	Closed from App Date	Last Follow-up Date
VRS Seq 1	Accepted for Services	12/05/2022	01/13/2023			

**Case Note**

Add Case Note  
Case Note Quick  
Case Note Search


**Cases**

Case Assignment

**EDS**

Add Document  
Add Multiple Documents  
Document Summary

**Service**

Authorization   
Payment

**Form/Letter/Schedule**

Referral Form

The following screen will appear:

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WORKFORCE ONE

Logged in as: pak

[Home](#)
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[Recent Work](#)
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[References](#)
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General

At-A-Glance

Tickler

MN Works Resume

Case Note

Add Case Note

Case Note Quick

Case Note Search

Cases

Case Assignment

EDS

Add Document

Add Multiple Documents

Document Summary

Service

Authorization

Payment

Form/Letter/Schedule

Referral Form

Authorization Summary

Happy Gilmore

Record ID 202155761

Show Filter Criteria

Hide VRS Seq 1 - Accepted for Services

Total Expended Amount

\$0.00

Total Pending Payment Amount

\$0.00

Auth Number	Service Title	Vendor	Issue Date	Start Date End Date	Auth Amount	Auth Status	Action
5323100223	1. Signed Placement Plan Meeting (\$1,330); 2. Employment First Shift Completed (\$1,200); 3. Successful Placement Closure (\$1,270)	Goodwill Easter Seals	05/10/2023	05/10/2023 09/30/2023	\$3,800.00	Issued	New Pay Reprint

Under the Action column click “**New Pay**” and the following screen will appear:

**WORKFORCE ONE** Logged in as: paulp

Home Search ▶ My Tasks ▶ Recent Work Reports References ▶ Resources ▶ Help

**General**  
At-A-Glance  
Tickler  
MN Works Resume

**Case Note**  
Add Case Note  
Case Note Quick  
Case Note Search

**Cases**  
Case Assignment

**EDS**  
Add Document  
Add Multiple Documents  
Document Summary

**Service**

**Authorization**  
Payment

**Form/Letter/Schedule**  
Referral Form

**Payment Edit**  
Happy Gilmore Record ID 202155761

Location Apple Valley  
Staff Assigned Laura J Cheney  
Entered By  
Auth Number 5323100223

Add Document

Hide Auth Information

Program Vocational Rehabilitation Services  
Federal Fiscal Year 2023  
Fund Stream New Plans FFY23  
Service Start Date 05/10/2023  
Document Type MWK - Services on Operating Agreement, Contract Number Required  
Contract ID 214095  
SWIFT PO  
SWIFT PO Status  
Comments Printed on Authorization  
Authorization Change Comments  
SWIFT Tax Code

Click **"Add Document"** and the following screen will appear:

**Document Add**  
Happy Gilmore Record ID 202155761 [Help](#)

Program Seq VRS Seq 1 (Accepted for Svcs)

\*EDS Document Type Financial - Bills, Expenses

\*Document Name Invoice and Supporting Documents

\*Select a File Choose File No file chosen

Next Cancel

**"EDS Document Type"**: Select Financial – Bills, Other from the drop-down menu

**"Document Name"**: select Invoice and Supporting Documentation from the drop-down menu

Click **"Choose File"** to add the file that is saved to your computer

Click **"Next"** and the following screen will appear:



## Document Add

Happy Gilmore

Record ID 202155761

[Help](#)

Program Seq

VRS Seq 1 (Accepted for Svcs)

\*EDS Document Type

Financial - Bills, Expenses

Selected File

5323100223 Goodwill Placement Plan 5-10-2023.pdf

\*Agency

Goodwill-Easter Seals

\*Staff Associated

Partner, Paul

\*Document Name

Invoice and Supporting Documents

☐ Use file name as User Defined Document Name

User Defined Document Name

Folder

Section E - Financial

Privacy Level

Staff Assigned to Case in Any Agency

Send Tickler To

None Selected

Can Share with Person

Yes

Received Date

Document Date

Signed Date

Expiration Date

Reason for Collecting

None Selected

[Select/Deselect](#)

User Defined Date 1

User Defined Date 2

User Defined Tag 1

User Defined Tag 2

**“User Defined Document Name”:** This is a field staff can type information to help identify what the document is. If staff save the document to their computer as indicated on the desk aid, then click the box next to “Use file name as User Defined Document Name”

Best practice is to name the document as follows:

Authorization Number, Agency, Service, Dates

Ex. 5323100223 Goodwill Placement Plan 5-10-2023

Click **“Upload”** and the following screen will appear:

**WORKFORCE ONE** Logged in as: paulpart

Home Search ▶ My Tasks ▶ Recent Work Reports References ▶ Resources ▶ Help

**General**

- At-A-Glance
- Tickler
- MN Works Resume

**Case Note**

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

**Cases**

- Case Assignment

**EDS**

- Add Document
- Add Multiple Documents
- Document Summary


**Service**

- Authorization**
  - Payment
- Form/Letter/Schedule**
  - Referral Form

**Payment Edit**

Happy Gilmore Record ID 202155761

Location Apple Valley  
 Staff Assigned Laura J Cheney  
 Entered By  
 Auth Number 5323100223

Document Name: User Defined Document Name	Attached To	Uploaded Date	Format	Action
Invoice Support Docs 5323100223 Goodwill Placement Plan 5-10-2023	This Payment Not Saved	05/26/2023 01:44:18 PM		Tags Delete Replace

▼ Hide Auth Information

Program Vocational Rehabilitation Services  
 Federal Fiscal Year 2023  
 Fund Stream New Plans FFY23  
 Service Start Date 05/10/2023  
 Document Type MWK - Services on Operating Agreement, Contract Number Required  
 Contract ID 214095  
 SWIFT PQ  
 SWIFT PQ Status  
 Comments Printed on Authorization  
 Authorization Change Comments  
 SWIFT Tax Code

The invoice/document that was added will display. Community Partner staff are strongly encouraged to click on the pdf icon to be sure the document is attached to the correct authorization in WF1. If the document is not correct staff can either click "Delete" or "Replace". Clicking "**Delete**" will delete the document. Clicking "**Replace**" will allow staff to select a different file.

After reviewing the document attached scroll down the page

▼ Hide Payment Information

Issue Date

05/10/2023

Service Completion Date

09/30/2023

\*Invoice Number

123456789

\*Invoice Date

05/26/2023

Invoice Receipt Date

Goods/Services Received Date

Customer Number

Item Description: Service Title	Auth Amount	Expended Amount	Pending Payment	Unpaid Amount	Taxable	*Invoice Amount
Signed Placement Plan: 1. Signed Placement Plan Meeting (\$1,330)	\$1,330.00	\$0.00	\$0.00	\$1,330.00	No ▼	\$ 1330.00
Employment First Shift Completed: 2. Employment First Shift Completed (\$1,200)	\$1,200.00	\$0.00	\$0.00	\$1,200.00	No ▼	\$
Successful Placement Closure: 3. Successful Placement Closure (\$1,270)	\$1,270.00	\$0.00	\$0.00	\$1,270.00	No ▼	\$
<b>Totals</b>	\$3,800.00	\$0.00	\$0.00	\$3,800.00		\$1,330.00

Calculate Totals

▼ Show Past Payments

▼ Show Payment Comment

▼ Show Case Note

Save as Pending

Cancel

**“Invoice Number”:** Enter the invoice number that is on the document that was added

**“Invoice Date”:** Enter the date the invoice was created

**“Invoice Amount”:** Enter the amount of the invoice. If multiple lines display, enter the amount that is being invoiced for each line item.

Click **“Save as Pending”** and the following screen will appear:

**WORKFORCE ONE** Logged in as: paul

Home Search My Tasks Recent Work Reports References Resources Help

**General** ✓ Pending Payment and documents saved.

At-A-Glance  
Tickler  
MN Works Resume

**Case Note**

Add Case Note  
Case Note Quick  
Case Note Search

**Cases**

Case Assignment

**EDS**

Add Document  
Add Multiple Documents  
Document Summary

**Service**

**Authorization**

Payment

**Form/Letter/Schedule**

Referral Form

### Authorization Summary

Happy Gilmore Record ID 202155761

▼ Show Filter Criteria

▼ Hide VRS Seq 1 - Accepted for Services

Total Expended Amount \$0.00  
Total Pending Payment Amount \$0.00

Auth Number	Service Title	Vendor	Issue Date	Start Date End Date	Auth Amount	Auth Status	Action
5323100223	1. Signed Placement Plan Meeting (\$1,330); 2. Employment First Shift Completed (\$1,200); 3. Successful Placement Closure (\$1,270)	Goodwill Easter Seals	05/10/2023	05/10/2023 09/30/2023	\$3,800.00	Partial Paid \$0.00	New Pay Reprint

The Authorization Summary page will appear. Once Community Partner staff click Save as Pending, WF1 will generate a tickler to the VRS staff assigned letting them know an invoice has been added. VR staff will review the invoice and report and process accordingly.

In the Auth Status column it indicates **"Partial Paid"**. To view more details about the pending payment click on the authorization number.

## Editing a Pending Payment

There are times when the Community Partner staff need to edit a payment that was submitted. Community Partner staff can edit payments that are in a Pending status. Using the left navigation, click “Payment”

**WORKFORCE ONE** Logged in as: paul

Home Search ▶ My Tasks ▶ Recent Work Reports References ▶ Resources ▶ Help

**General**

**At-A-Glance** Person At-A-Glance

Happy Gilmore Record ID 202155761

Name Happy Gilmore

Record ID 202155761

Program	Status	Application Date	Accepted for Services Date	Exit Date	Closed from App Date	Last Follow-up Date
VRS Seq 1	Accepted for Services	12/05/2022	01/13/2023			

**Case Note**

Add Case Note

Case Note Quick

Case Note Search

**Cases**

Case Assignment

**EDS**

Add Document

Add Multiple Documents

Document Summary

**Service**

Authorization

**Payment** ←

**Form/Letter/Schedule**

Referral Form

The following screen will appear:

**WORKFORCE ONE** Logged in as: p

Home Search ▶ My Tasks ▶ Recent Work Reports References ▶ Resources ▶ Help

**General**

- At-A-Glance
- Tickler
- MN Works Resume

**Case Note**

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

**Cases**

- Case Assignment

**EDS**

- Add Document
- Add Multiple Documents
- Document Summary

**Service**

- Authorization

**Payment**

**Form/Letter/Schedule**

- Referral Form

**Payment Summary**

Happy Gilmore Record ID 202155761

▼ Show Filter Criteria

▼ Hide VRS Seq 1 - Accepted for Services

Auth Number	Payment Amount	Payment Status	Initiated Date	Last Updated By	Action
5323100223	\$1,330.00	Pending	05/26/2023	Partner, Paul	<a href="#">Edit</a>

Click **"Edit"** and the following screen will appear:



**WORKFORCE ONE** Logged in as: paulpa

Home Search My Tasks Recent Work Reports References Resources Help

**General**  
 At-A-Glance  
 Tickler  
 MN Works Resume

**Case Note**  
 Add Case Note  
 Case Note Quick  
 Case Note Search

**Cases**  
 Case Assignment

**EDS**  
 Add Document  
 Add Multiple Documents  
 Document Summary

**Service**  
 Authorization

**Payment**  
 Form/Letter/Schedule  
 Referral Form

### Payment Edit

**Happy Gilmore** Record ID 202155761

Location: Apple Valley  
 Staff Assigned: Laura J Cheney  
 Entered By: Paul Partner  
 Auth Number: 5323100223

Document Name: User Defined Document Name	Attached To	Uploaded Date	Format	Action
Invoice Support Docs	This Payment	05/26/2023 01:44:18 PM		Tags Delete Replace
5323100223 Goodwill Placement Plan 5-10-2023				

**Hide Auth Information**

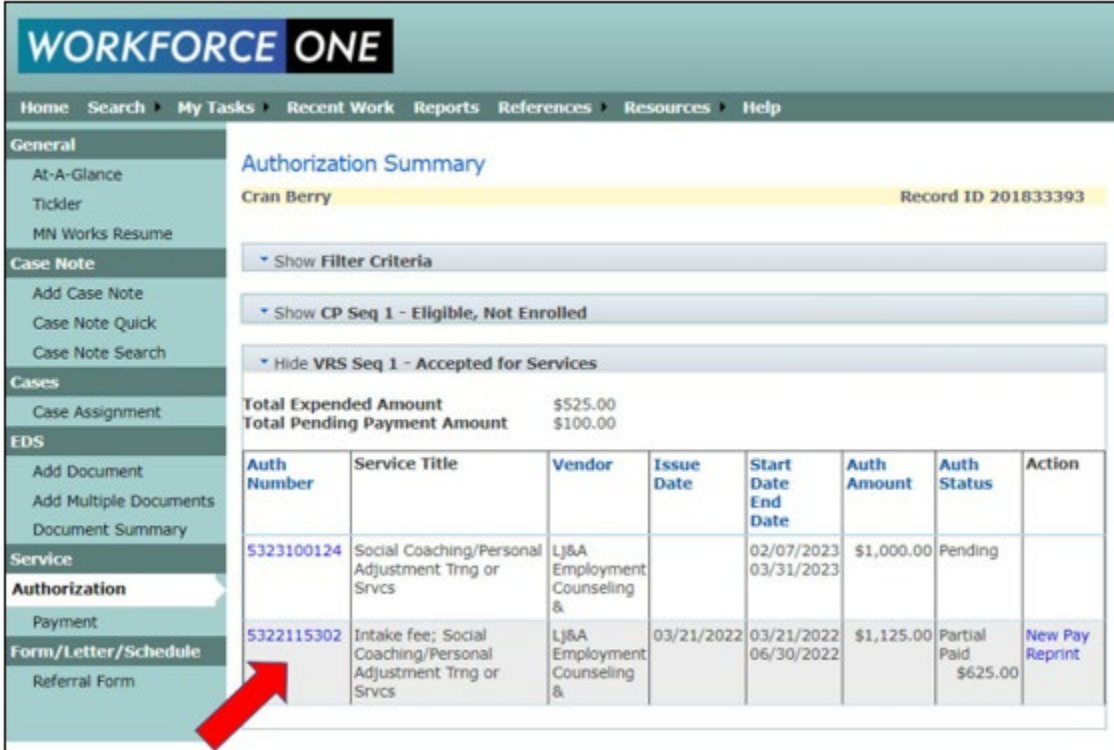
Program: Vocational Rehabilitation Services  
 Federal Fiscal Year: 2023  
 Fund Stream: New Plans FFY23  
 Service Start Date: 05/10/2023  
 Document Type: MWK - Services on Operating Agreement, Contract Number Required  
 Contract ID: 214095  
 SWIFT PQ  
 SWIFT PQ Status  
 Comments Printed on Authorization  
 Authorization Change Comments  
 SWIFT Tax Code

The most common reason to edit a pending payment is to correct the invoice document. The Community Partner staff can **Replace** the original invoice that was uploaded.

After replacing the invoice make sure to click **Save as Pending** at the bottom of the page.

## Reviewing Payment Detail

WF1 displays information about the status of a payment. To view the details use the left navigation, click **“Authorization”** and the following screen will appear:



**WORKFORCE ONE**

Home Search ▶ My Tasks ▶ Recent Work Reports References ▶ Resources ▶ Help

**General**

- At-A-Glance
- Tickler
- MN Works Resume

**Case Note**

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

**Cases**

- Case Assignment

**EDS**

- Add Document
- Add Multiple Documents
- Document Summary

**Service**

- Authorization**
- Payment
- Form/Letter/Schedule
- Referral Form

**Authorization Summary**

Cran Berry Record ID 201833393

▼ Show Filter Criteria

▼ Show CP Seq 1 - Eligible, Not Enrolled

▼ Hide VRS Seq 1 - Accepted for Services

Total Expended Amount \$525.00  
Total Pending Payment Amount \$100.00

Auth Number	Service Title	Vendor	Issue Date	Start Date End Date	Auth Amount	Auth Status	Action
5323100124	Social Coaching/Personal Adjustment Trng or Svcs	Lj&A Employment Counseling &		02/07/2023 03/31/2023	\$1,000.00	Pending	
5322115302	Intake fee; Social Coaching/Personal Adjustment Trng or Svcs	Lj&A Employment Counseling &	03/21/2022	03/21/2022 06/30/2022	\$1,125.00	Partial Paid \$625.00	New Pay Reprint

Click the authorization number and the following screen will appear:

WORKFORCE ONE

Logged in as: p  
 Change f

Home Search ▶ My Tasks ▶ Recent Work Reports References ▶ Resources ▶ Help

General

At-A-Glance  
 Contact  
 Tickler  
 Demographics  
 MN Works Resume

Case Note

Add Case Note  
 Case Note Quick  
 Case Note Search

Cases

Case Assignment

EDS

Add Document  
 Add Multiple Documents  
 Document Summary

Service

Authorization  
 Payment

Form/Letter/Schedule

Referral Form

Print Launch  
 Open PDF Back to Authorization Summary

1 of 2

### Authorization with Payments

<b>Name</b>	Cran Berry	<b>Program Sequence</b>	VRS
<b>WF1 Record ID</b>	201833393	<b>Location</b>	Roch
<b>Authorization Number</b>	5322115302	<b>Authorization Status</b>	Parti
<b>Purchase Order Number</b>	3000464451	<b>Purchase Order Status</b>	Dispe
<b>Document Type</b>	MWK - Services on Operating Agreement, Contract Number Required	<b>Contract ID</b>	0000
<b>Staff Assigned</b>	Emily C Bents	<b>Staff Entered</b>	Heat
<b>Issued By</b>	Jacquelyn D Olson	<b>Issued Date</b>	03/2
<b>Funding Stream</b>	Carryover Plan FFY22	<b>SWIFT Tax Code</b>	
<b>Service Start Date</b>	03/21/2022	<b>Service Completion Date</b>	06/3
<b>Shipping</b>	No Shipping Information	<b>Shipping Location</b>	
<b>Authorization Comment</b>			
<b>Authorization Change Comment</b>			
<b>CFP</b>			
<b>Original Authorization Amount</b>	\$1,125.00	<b>Expended Amount</b>	
<b>Current Authorization Amount</b>	\$1,125.00	<b>Unpaid Authorized Amount</b>	
<b>Pending Payment Amount</b>	\$0.00	<b>Cancelled Amount</b>	
<b>Service Vendor SWIFT ID</b>	0000375969001	<b>Remit to Vendor SWIFT ID</b>	0000
<b>Service Vendor Name</b>	Lj&A Employment Counseling & Placement Services Llc	<b>Remit to Vendor Name</b>	Lj&A Place
<b>Service Vendor Address</b>	2489 RICE ST #150 ROSEVILLE, MN 55113	<b>Remit to Vendor Address</b>	2489 ROS

Scroll down the page.

ROSEVILLE, MN 55113									
Service Vendor FAX (651) 481-1131									
<b>1 - Intake Fee</b>									
Service Type	Service Title: Primary Service Title	Category Code	K Line	# of Units: UOM	Unit Price	Taxable	Original Auth Amount	Current Auth Amount	Pend Payr Amo
Information and Referral Services	Intake fee	85122100	1	1.00 EACH	\$125.000	No	\$125.00	\$125.00	
<b>Payment Detail for 1 - Intake Fee</b>									
Payment Status: Payment Date	SWIFT ID: Remit to Vendor Name	Entered By: Approved By	Invoice Number: Contested Invoice	Check/EFT Number	SWIFT Account	Voucher Number	Initiated Amount	Stat	
Paid 04/21/2022	0000375969001 LJS&A Employment Counseling &	Eh D Lay Heather Grummons	ROC-4277	EFT: 0007348630	441006	01884331	\$125.00		
<b>2 - Social Coaching</b>									
Service Type	Service Title: Primary Service Title	Category Code	K Line	# of Units: UOM	Unit Price	Taxable	Original Auth Amount	Current Auth Amount	Pend Payr Amo
Training - Disability Related Skills	Social Coaching/Personal Adjustment Trng or Svcs	85122100	1	10.00 EACH	\$100.000	No	\$1,000.00	\$1,000.00	
<b>Payment Detail for 2 - Social Coaching</b>									
Page 1 of 2									

In this example, line 1 of the authorization was for an Intake Fee of \$125.00. The Payment Detail shows the invoice was Paid on 04/21/2022, the Invoice Number, EFT/Check Number and Amount.

Other Statuses Community Partner might see are:

**Pending:** Community Partner staff have submitted an invoice for VRS staff to review

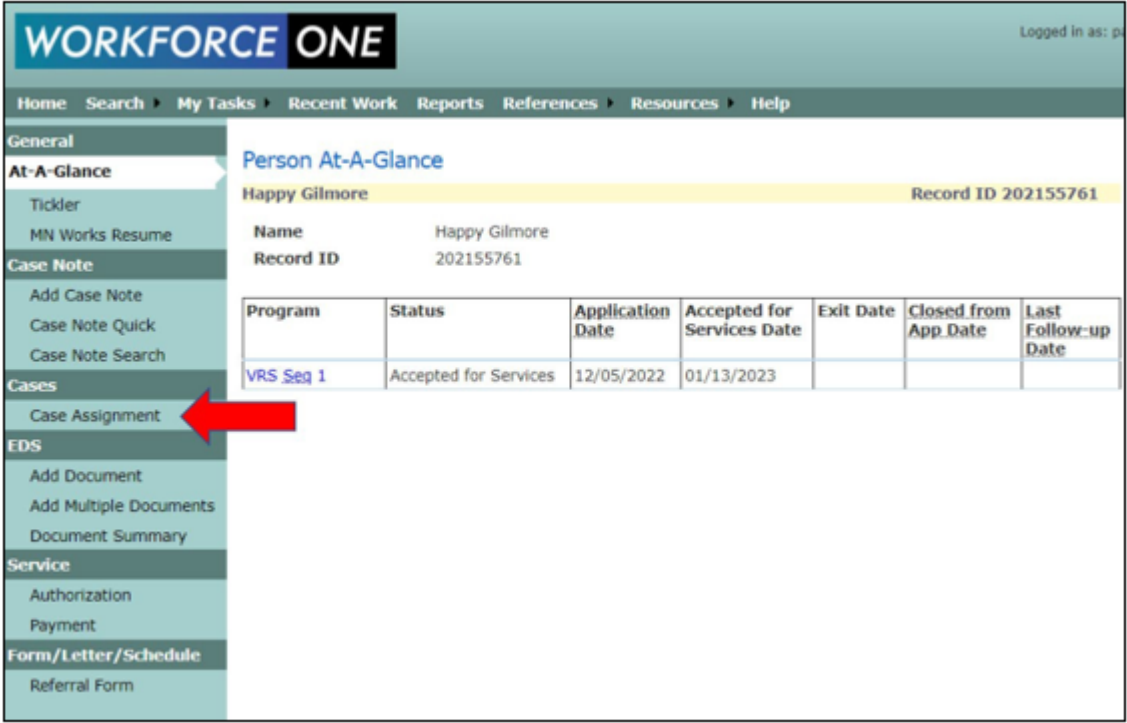
**Pending Fiscal:** VRS staff have reviewed the payment and submitted it to fiscal for final processing

**Pending SWIFT:** Fiscal staff have reviewed the payment and submitted it for payment

**Cancelled:** The payment was cancelled by VRS staff.

## Case Assignment

Community Partner staff will be able to transfer case assignment to someone else in their agency or end case assignment. Using the left navigation, click **“Case Assignment”**



**WORKFORCE ONE** Logged in as: p

Home Search ▶ My Tasks ▶ Recent Work Reports References ▶ Resources ▶ Help

**General**

**At-A-Glance**

Happy Gilmore Record ID 202155761

Name Happy Gilmore

Record ID 202155761

Program	Status	Application Date	Accepted for Services Date	Exit Date	Closed from App Date	Last Follow-up Date
VRS Seq 1	Accepted for Services	12/05/2022	01/13/2023			

**Case Note**

Add Case Note

Case Note Quick

Case Note Search

**Cases**

Case Assignment

**EDS**

Add Document

Add Multiple Documents

Document Summary

**Service**

Authorization

Payment

**Form/Letter/Schedule**

Referral Form

The following screen will appear:

**WORKFORCE ONE** Logged In as: pa

Home Search ▶ My Tasks ▶ Recent Work Reports References ▶ Resources ▶ Help

**General**  
At-A-Glance  
Tickler  
MN Works Resume

**Case Note**  
Add Case Note  
Case Note Quick  
Case Note Search

**Cases**  
**Case Assignment**

**EDS**  
Add Document  
Add Multiple Documents  
Document Summary

**Service**  
Authorization  
Payment

**Form/Letter/Schedule**  
Referral Form


### Case Assignment

Happy Gilmore Record ID 202155761

▼ Hide Vocational Rehabilitation Services Seq 1, Accepted for Services

Case Role	Current Staff	Current Agency: Location	Team	Action
Primary Staff	Laura J Cheney 952-703-3182 laura.cheney@state.mn.us	Rehabilitation Services: Apple Valley	Apple Valley	
Support Staff	Heather K Brown 952-737-8356 heather.brown@state.mn.us.xx	Rehabilitation Services: Apple Valley	Apple Valley	
Secondary Staff	Paul Partner 651-777-7777 paul.partner@goodwill.com	Goodwill-Easter Seals: Fairview Ave. North		<a href="#">Transfer End</a>
Placement Staff				

Show History



Under the Action column click **“Transfer”** and the following screen will appear:



The screenshot shows the WORKFORCE ONE interface. The top navigation bar includes links for Home, Search, My Tasks, Recent Work, Reports, References, Resources, and Help. The left sidebar contains a menu with categories: General (At-A-Glance, Tickler, MN Works Resume), Case Note (Add Case Note, Case Note Quick, Case Note Search), Cases (Case Assignment), EDS (Add Document, Add Multiple Documents, Document Summary), Service (Authorization, Payment), and Form/Letter/Schedule (Referral Form). The main content area is titled 'Transfer Case Assignment' and shows a record for 'Happy Gilmore' with Record ID 202155761. The record is for 'Secondary Staff for Vocational Rehabilitation Services Seq 1'. The form fields include: \*Agency (None Selected), \*Location (Select Agency First), \*Staff (Select Agency and Location First), and \*Start Date (05/26/2023). There are 'Save' and 'Cancel' buttons at the bottom.

**“Agency”:** Select your agency

**“Location”:** Select from the drop-down menu, if applicable

**“Staff”:** Select the staff that the record should be transferred to

**“Start Date”:** Will default to today’s date but can be changed if needed

Click **“Save”**

The record has been transferred.

If additional Community Partner staff need to be added to a record VRS staff need to be notified. VRS staff are the only ones that can add case assignment.

WORKFORCE ONE

Logged in as: pau

[Home](#)
[Search](#)
[My Tasks](#)
[Recent Work](#)
[Reports](#)
[References](#)
[Resources](#)
[Help](#)

General

At-A-Glance

Tickler

MN Works Resume

Case Note

Add Case Note

Case Note Quick

Case Note Search

Cases

Case Assignment

EDS

Add Document

Add Multiple Documents

Document Summary

Service

Authorization

Payment

Form/Letter/Schedule

Referral Form

Case Assignment

Happy Gilmore

Record ID 202155761

Hide Vocational Rehabilitation Services Seq 1, Accepted for Services

Case Role	Current Staff	Current Agency: Location	Team	Action
Primary Staff	Laura J Cheney 952-703-3182 laura.cheney@state.mn.us	Rehabilitation Services: Apple Valley	Apple Valley	
Support Staff	Heather K Brown 952-737-8356 heather.brown@state.mn.us.xx	Rehabilitation Services: Apple Valley	Apple Valley	
Secondary Staff	Paul Partner 651-777-7777 paul.partner@goodwill.com	Goodwill-Easter Seals: Fairview Ave. North		Transfer End
Placement Staff				

Show History

When all work is complete with a participant, Community Partner staff will end the case assignment by clicking **“End”**. This will end the case assignment and the Community Partner staff will no longer have access to the record.

## Reports

There are reports available to the Community Partner staff to review authorizations and payments.



From the top navigation click **“Reports”** and the following screen will appear:

WORKFORCE ONE				
Logged in as: paulpartner - VRS: User: Goodwill-Easter				
Change Password My Profile				
Home Search My Tasks Recent Work Reports References Resources Help				
Report Search				
Show Search Criteria				
Hide Search Results				
New Search Refine Search				
Show 100 200 500 Displaying 1 to 59 of 59				
Report	Program(s)	Report Type(s)	Report Description	Favorite
Activity Detail	Adult, ACP, CP, DW, DWP, HH, Vet-H, MFIP, MSPW, MYP, MFRP (MN DH), MINRAE, P2P, RETAIN, SNAP ET, TY, Vet, VRS, WIA OY, WIA YY, WIOA ISY, WIOA OSY, WDU, Y&W	Activities	This report includes person activity and exit information by enrollment date. Persons who were enrolled during any point of the report dates are included in the results, even if they are now exited. Open and closed activities for those persons appear, unless the user elects to return only open or closed activities via the additional parameters. When a person is transferred to a new agency with open activities, those activities are transferred and the history is altered to reflect the transfer.	Add to Favorites
Activity Summary	Adult, ACP, CP, DW, DWP, HH, Vet-H, MFIP, MSPW, MYP, MFRP (MN DH), MINRAE, P2P, RETAIN, SNAP ET, TY, Vet, VRS, WIA OY, WIA YY, WIOA ISY, WIOA OSY, WDU, Y&W	Activities	This report displays counts of activity types by activity date. Persons can be counted more than once in the Category/Activity Totals if they have more than one of a given activity type. The Person Total is a unique count of individuals for each activity type. The subtotals are also unique person counts for that category of activities so they will not be the sum of the activity types above it.	Add to Favorites
Authorization Master Detail	DW, SSU, VRS, WDU	Services	This report will display the details for the authorizations within the report criteria.	Add to Favorites
Authorization Master Summary	DW, SSU, VRS, WDU	Services	This report will display totals for the authorizations within the report criteria.	Add to Favorites
Authorizations Pending and Pre-Issue Detail	DW, SSU, VRS, WDU	Services	This report will list the authorizations that are in pending or pre-issue status.	Add to Favorites
Authorizations SWIFT Discrepancy Detail	DW, SSU, VRS, WDU	Services	This report produces a list of authorizations that were sent back	Add to Favorites

Find the **“Contractor Unpaid Authorizations Detail Report,”** and the following screen will appear:

The screenshot shows the 'Contractor Unpaid Authorizations Detail Report' page in the Workforce One system. The page has a teal header with the 'WORKFORCE ONE' logo. Below the header is a navigation bar with links: Home, Search, My Tasks, Recent Work, Reports, References, Resources, and Help. The main content area is titled 'Contractor Unpaid Authorizations Detail Report'. It features a section titled 'Hide Initial Criteria' with two dropdown menus: 'Scope' (set to 'Agency level') and 'Funding' (set to 'Program level'). Below these is a question 'Which Scope and Funding selection should I make?' followed by a checkbox 'Include past agencies, teams, staff, and locations in dropdown menus.' There are two buttons: 'Next' and 'Populate from Last Report'. At the bottom of the main content area is a button 'Back to Report Search'. A footer bar contains a link 'Show Contractor Unpaid Authorizations Detail Report'.

Click **“Next”** and the following screen will appear:

The screenshot shows the 'Contractor Unpaid Authorizations Detail Report' page after clicking 'Next'. The page layout is similar to the previous one, but the 'Hide Initial Criteria' section now displays the selected criteria: 'Scope' is 'Agency level' and 'Funding' is 'Program level'. Below this, the text 'Do not include past agencies, teams, staff, and locations in dropdown menus.' is displayed. There is a button 'Change Initial Criteria'. Below the criteria section, there are two more dropdown menus: 'Agency' (set to 'Goodwill-Easter Seals') and 'Program' (set to 'Vocational Rehabilitation Services'). At the bottom of the main content area are two buttons: 'Run Report' and 'Back to Report Search'. The footer bar remains the same with the link 'Show Contractor Unpaid Authorizations Detail Report'.

Click **“Run Report”** and the following screen will appear:

**WORKFORCE ONE** Logged in as: paulpartner - VRS: User: Goodwill-East  
Change Password My Profile

Home Search My Tasks Recent Work Reports References Resources Help

### Contractor Unpaid Authorizations Detail Report

Show Initial Criteria

Run Report Refine Criteria Back to Report Search

Hide Contractor Unpaid Authorizations Detail Report

Report will need to be printed on legal size paper for best printed copy.  
If additional analysis of report is needed, preferred export option is CSV.  
Export to PDF to print the formatted report.

Scroll Left Scroll Right

1 of 32 Find Next

**WORKFORCE ONE** Contractor Unpaid Authorizations Detail

Show/hide additional common criteria

Person Name	Record ID	Auth Number	SWIFT PO	Auth Start Date	Auth Amount	Pending Payment Amount	Total Paid Amount	Unpaid Amount	Last Payment Date	Service Title	Primary Staff
	202027949	5322121851	3000472087	06/06/2022	\$875.00	\$0.00	\$0.00	\$875.00		Pre-ETS Workplace Readiness Training Services;Pre-ETS Intake	Pietsch, Anna
	202129102	5322101346	3000447993	10/01/2021	\$1,325.00	\$0.00	\$0.00	\$1,325.00		Employee Development Services - Integrated;Intake fee	Rosman Bangasser, Karen L.
	202119015	5322104636	3000452273	10/20/2021	\$1,500.00	\$0.00	\$0.00	\$1,500.00		Job Coaching for Short Term Job Supports	Rosman Bangasser, Karen L.
	202119015	5322104638	3000452230	10/20/2021	\$3,800.00	\$0.00	\$0.00	\$3,800.00		1. Signed Placement Plan Meeting (\$1,330);2. Employment First Shift	Rosman Bangasser, Karen L.

This report will show all authorizations to the agency that are unpaid.

Hide Contractor Unpaid Authorizations Detail Report

Report will need to be printed on legal size paper for best printed copy.  
If additional analysis of report is needed, preferred export option is CSV.  
Export to PDF to print the formatted report.

Scroll Left Scroll Right

1 of 32 Find Next

**WORKFORCE ONE** Contractor Unpaid Authorizations Detail

Show/hide additional common criteria

Word  
Excel  
PDF  
CSV (comma delimited)

Person Name	Record ID	Auth Number	SWIFT PO	Auth Start Date	Auth Amount	Pending Payment Amount	Total Paid Amount	Unpaid Amount	Last Payment Date	Service Title	Primary Staff
	202027949	5322121851	3000472087	06/06/2022	\$875.00	\$0.00	\$0.00	\$875.00		Pre-ETS Workplace Readiness Training Services;Pre-ETS Intake	Pietsch, Anna
	202129102	5322101346	3000447993	10/01/2021	\$1,325.00	\$0.00	\$0.00	\$1,325.00		Employee Development Services - Integrated;Intake fee	Rosman Bangasser, Karen L.
	202119015	5322104636	3000452273	10/20/2021	\$1,500.00	\$0.00	\$0.00	\$1,500.00		Job Coaching for Short Term Job Supports	Rosman Bangasser, Karen L.
	202119015	5322104638	3000452230	10/20/2021	\$3,800.00	\$0.00	\$0.00	\$3,800.00		1. Signed Placement Plan Meeting (\$1,330);2. Employment First Shift	Rosman Bangasser, Karen L.

The report can be exported to an Excel or PDF document by clicking the disk icon.

Report Search			
Show Search Criteria			
Hide Search Results			
<input type="button" value="New Search"/> <input type="button" value="Refine Search"/>			
<div> Show 100 200 500  Displaying 1 to 59 of 59 </div>			
Report -	Program(s)	Report Type(s)	Report Description
Activity Detail	Adult, ACP, CP, DW, DWP, HH, Vet-H, MFJP, MSPW, MYR, MFRP (MN DH), MNRAE, P2P, RETAIN, SNAP ET, TY, Vet, VRS, WIA OY, WIA YY, WIOA ISY, WIOA OSY, WDU, YstW	Activities	This report includes person activity and exit information by enrollment date. Persons who were enrolled during any point of the report dates are included in the results, even if they are now exited. Open and closed activities for those persons appear, unless the user elects to return only open or closed activities via the additional parameters. When a person is transferred to a new agency with open activities, those activities are transferred and the history is altered to reflect the transfer.
Activity Summary	Adult, ACP, CP, DW, DWP, HH, Vet-H, MFJP, MSPW, MYR, MFRP (MN DH), MNRAE, P2P, RETAIN, SNAP ET, TY, Vet, VRS, WIA OY, WIA YY, WIOA ISY, WIOA OSY, WDU, YstW	Activities	This report displays counts of activity types by activity date. Persons can be counted more than once in the Category/Activity Totals if they have more than one of a given activity type. The Person Total is a unique count of individuals for each activity type. The subtotals are also unique person counts for that category of activities so they will not be the sum of the activity types above it.
Authorization Master Detail	DW, SSU, VRS, WDU	Services	This report will display the details for the authorizations within the report criteria.
Authorization Master Summary	DW, SSU, VRS, WDU	Services	This report will display totals for the authorizations within the report criteria.
Authorizations Pending and Pre-Issue Detail	DW, SSU, VRS, WDU	Services	This report will list the authorizations that are in pending or pre-issue status.
Authorizations SWIFT Discrepancy Detail	DW, SSU, VRS, WDU	Services	This report produces a list of authorizations that were sent back to Workforce One from SWIFT to be resolved because they have a \$0.00 amount and/or no purchase order (PO) numbers.
Authorizations Unpaid Detail	DW, SSU, VRS, WDU	Services	This report returns authorizations from a specific fiscal year that are unpaid and are past their service end date by 45 days, 60 days, 90 days, or the full fiscal year. It includes SWIFT Purchase Order numbers.
Authorizations Unpaid Summary	DW, SSU, VRS, WDU	Services	This report returns summary information regarding authorizations from a specific fiscal year that are unpaid and are past their service end date by 45 days, 60 days, 90 days, or the full fiscal year.

The reports highlighted in yellow are specific to authorizations and payments:

#### Authorization Master Detail\*

Authorization Master Summary

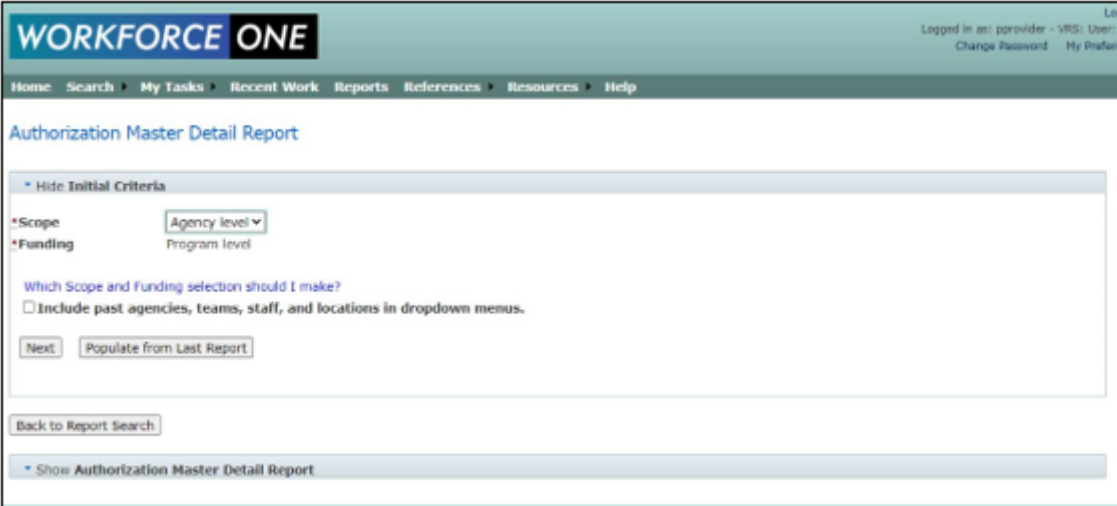
#### Authorizations Unpaid Detail\*

Authorizations Unpaid Summary

The summary reports will provide summary information with the ability to drill down for more details.

\*These reports will provide the detail information and are most likely the report that partner staff will want to run.

**Authorization Master Detail Report:** use this report to find information for all authorizations that have been created. If information is needed specifically about unpaid authorizations use the Unpaid Authorization Detail Report.



The screenshot shows the WORKFORCE ONE interface. At the top, there's a navigation bar with links: Home, Search, My Tasks, Recent Work, Reports, References, Resources, and Help. The user is logged in as 'pprovider - VRS: User:'. Below the navigation bar, the page title is 'Authorization Master Detail Report'. There's a section titled 'Hide Initial Criteria' with two dropdown menus: 'Scope' (set to 'Agency level') and 'Funding' (set to 'Program level'). Below these, there's a question 'Which Scope and Funding selection should I make?' and a checkbox 'Include past agencies, teams, staff, and locations in dropdown menus.' There are two buttons: 'Next' and 'Populate from Last Report'. At the bottom, there's a button 'Back to Report Search' and a link 'Show Authorization Master Detail Report'.

Leave defaults and click **“Next”**



Home Search My Tasks Recent Work Reports References Resources Help

### Authorization Master Detail Report

Hide Initial Criteria

Scope Agency level  
Funding Program level

Do not include past agencies, teams, staff, and locations in dropdown menus.

Change Initial Criteria

Agency USA  
Location All Values  
Staff All Values  
Program Vocational Rehabilitation Services

Hide Additional Criteria

Federal Fiscal Year None Selected  
Remit To Vendor SWIFT ID  
Authorization Status All Values  
Service Type All Values  
Service Title All Values  
Service Start Date From Service Start Date To

Run Report Back to Report Search

Show Authorization Master Detail Report

**Location:** Leave at default value

**Staff:** Leave at default value

**Federal Fiscal Year:** Select

2023 = Authorizations issued from 10/01/2022 to 09/30/2022

2022 = Authorizations issued from 10/01/2021 to 09/30/2022

**Authorization Status:** Select one of the following or leave at default value “All Values”

Issued = Authorization has been created but no payments have been made

Partial Paid = At least one payment has been made against the authorization

Final Paid = All payments have been made against the authorization

**Service Start Date From:** Populate a date in this field to display authorizations for a specific start date. This could be helpful for the quarterly Pre-ETS Authorizations or authorizations created for the start of a new fiscal year (ex. 10/01/2022, 01/01/2023, etc.)

Click **“Run Report”**

Authorization Master Detail Report

Run Report Refine Criteria Back to Report Search

Hide Authorization Master Detail Report

Report will need to be printed on legal size paper for best printed copy.  
If additional analysis of report is needed, preferred export option is CSV.  
Export to PDF to print the formatted report.

Scroll Left Scroll Right

1 of 1

WORKFORCE ONE

Show/hide additional common criteria

Export Options:

- XML file with report data
- CSV (comma delimited)
- PDF
- HTML (web archive)
- Excel
- TIFF file
- Word

Staff	Location	Team	Person Name	Record ID	Auth. Number/ SWIFT ID	Original Auth. Amt	Current Auth. Amt	Orig vs Current Amt	Paid Amt	Unpaid Amt	Tax Amt	Auth. Status	Service Provider	Remit to Vendor SWIFT ID/ Vendor Name	Service Types(s)	Service Title(s)
Brelland, Alex F	St. Paul	St. Paul	Berry, Blus	202037997	5323100013	\$2,470.00	\$2,470.00	\$0.00	\$0.00	\$2,470.00	\$0.00	Partial Paid	LJ&A Employment Counseling &	0000375969001 LJ&A Employment Counseling &	Job Placement Services - General P&A	2- Employment First Shift Completed (\$1,200); 3- Successful Placement Closure (\$1,270)
Fox, Susan L	St. Paul	St. Paul	Berry, Stram	202102360	5323100015	\$600.00	\$600.00	\$0.00	\$0.00	\$600.00	\$0.00	Partial Paid	LJ&A Employment Counseling &	0000375969001 LJ&A Employment Counseling &	Pre-ETS Job Exploration Counseling Services	Job Exploration Counseling Services
McCart, Amber R	St. Paul	St. Paul	Berry, Razz H	201810131	5323100014	\$1,050.00	\$1,050.00	\$0.00	\$0.00	\$1,050.00	\$0.00	Issued	LJ&A Employment Counseling &	0000375969001 LJ&A Employment Counseling &	On the Job Supports - Time Limited	Job Coaching for Short Term Job Supports
Wentzlaff, JoAnna C	Apple Valley	Apple Valley	Doe, Jon	202151288	5323100012	\$525.00	\$525.00	\$0.00	\$0.00	\$525.00	\$0.00	Issued	LJ&A Employment Counseling &	0000375969001 LJ&A Employment Counseling &	On the Job Supports - Time Limited	Job Coaching for Short Term Job Supports

Results will display which show the Paid Amount, Unpaid Amount, Service Titles, Start and End Date.

Staff can export the report to a pdf or Excel document by clicking the disk icon.

**Authorization Unpaid Detail Report:** Use this report to find information for unpaid authorizations. This will include authorizations that have a partial payment.

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WORKFORCE ONE

Logged in as: provider - VRS: User  
Change Password My Preferences

Home Search My Tasks Recent Work Reports References Resources Help

### Authorizations Unpaid Detail Report

Hide Initial Criteria

Scope Agency level

Funding Program level

Which Scope and Funding selection should I make?

☐ Include past agencies, teams, staff, and locations in dropdown menus.

Next Populate from Last Report

Back to Report Search

Show Authorizations Unpaid Detail Report

m ©2022 WV D&ED For login issues, call 651-297-1111. For all other WF1 issues, submit a WF1 help desk ticket. Build 2023.01.24-01

Leave defaults and click **“Next”**

**WORKFORCE ONE**

Logged in as: provider - VRS: User: [Log Out](#)  
[Change Password](#) [My Profile](#)

[Home](#) [Search](#) [My Tasks](#) [Recent Work](#) [Reports](#) [References](#) [Resources](#) [Help](#)

### Authorizations Unpaid Detail Report

**Hide Initial Criteria**

Scope: Agency level  
Funding: Program level

Do not include past agencies, teams, staff, and locations in dropdown menus.

[Change Initial Criteria](#)

Agency: LTRA  
Location: [All Values](#) [Select/Deselect](#)  
Staff: [All Values](#) [Select/Deselect](#)  
Program: Vocational Rehabilitation Services

**Hide Additional Criteria**

\*Federal Fiscal Year: [None Selected](#)  
\*Fund Stream: [Select Program and FFY to populate this field.](#)  
\*Days Past End Date: [None Selected](#)

[Run Report](#) [Back to Report Search](#)

[Show Authorizations Unpaid Detail Report](#)

**Location:** Leave at default value

**Staff:** Leave at default value

**Federal Fiscal Year:** Select

2023 = Authorizations issued from 10/01/2022 to 09/30/2022

2022 = Authorizations issued from 10/01/2021 to 09/30/2022

**Fund Stream:** Leave at default value

**Days Past End Date:** Select

45 Days

60 Days

90 Days

All Authorizations

All Past Due

Click **“Run Report”**

Hide Authorizations Unpaid Detail Report

Report will need to be printed on legal size paper for best printed copy.  
If additional analysis of report is needed, preferred export option is CSV.  
Export to PDF to print the formatted report.

Scroll Left Scroll Right

14 of 1 Find Next

**WORKFORCE ONE** Authorizations Unpaid Detail

☐ Show/Hide additional common criteria

Primary Staff	Record ID	Person Name	Auth Number	SWIFT PO	Exited	Auth End Date	Days Since End Date	Auth Amount	Pending Payment Amount	Total Paid Amount	Unpaid Amount	Last Payment Date	Vendor Name	App Loc
Fox, Susan L	202102360	Berry, Susan	5323100015			12/31/2022	27	\$600.00	\$0.00	\$0.00	\$600.00	10/28/2022	UJA Employment Counseling &	St. L
McCourt, Amber N	201810131	Berry, Razz H	5323100014		Yes	11/30/2022	58	\$1,050.00	\$0.00	\$0.00	\$1,050.00		UJA Employment Counseling &	St. L
Neil, Michael J	202037997	Berry, Blue	5323100013			06/01/2023	(125)	\$2,470.00	\$0.00	\$0.00	\$2,470.00	12/01/2022	UJA Employment Counseling &	Roch
Wentzleff, Joanna C	202151288	Doe, Jon	5323100012			12/31/2022	27	\$525.00	\$0.00	\$0.00	\$525.00		UJA Employment Counseling &	App Vall
<b>Total</b>			4					\$4,645.00	\$0.00	\$0.00	\$4,645.00			

Results will display which include the Authorization End Date, Authorized Amount, Pending Payment Amount, Total Amount Paid, Unpaid Amount and Last Payment Date.

Report can be exported to a pdf of Excel document by clicking the disk icon