



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

[Type here]

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.

WORKFORCE ONE

*Username:
*Password: **LOG IN**
[Forgot Username/Password](#) [Help](#)

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](#)

m ©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.

The screenshot shows the Workforce One dashboard interface. At the top, there is a navigation bar with 'WORKFORCE ONE' logo and user information: 'Logged in as: pprovider - VRS: User: [Name] Change Password My Preferences'. Below the navigation bar, the main content area is titled 'Dashboard' and 'System Alerts'. A large green message reads 'This is QA.' Under 'My Info', it shows '9 Tickler(s) past due', 'No Ticklers due today', and 'No Appointments today'. A login history note states 'Previous successful login was at 01/20/2023 12:44 PM' with a checked box for 'Include Exited Cases'. A section titled 'Hide Current Caseload' contains a table with 8 columns: Name, Record ID, Program, Case Status: Role, Residential County, Latest Open Activity Assigned to You/Days Open, Last Case Note, and Earliest Tickler Date. The table lists six records for 'Berry' with various details on case status, location, and activity.

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:

The screenshot shows the WORKFORCE ONE application interface. At the top, the logo 'WORKFORCE ONE' is displayed on the left, and user information 'Logged in as: pprovider - VRS; User: LISA' is on the right. Below the logo is a navigation bar with links: Home, Search, My Tasks, Recent Work, Reports, References, Resources, and Help. A dropdown menu is open under 'Search', with 'Person' highlighted by a red arrow. Other options in the dropdown include 'Advanced Search', 'System AI User', 'Authorization', 'Payment', and 'Agency'. The main content area shows 'My Info' with statistics: '9 Tickler(s) past due', 'No Ticklers due today', and 'No Appointments today'. A 'Previous successful login was at 01/20/2023 12:44 PM' and a checkbox for 'Include Exited Cases' are also visible. Below this is a section for 'Hide Current Caseload' with a table of case assignments. The table has columns for Name, Record ID, Program, Case Status: Role, Residential County, Latest Open Activity Assigned to You/Days Open, Last Case Note, and Earliest Tickler Date. The table displays four rows of data.

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 Breland	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 Dufer	No Ticklers Due
Berry, Razz M	201810131	VRS	Exited: Secondary	Ramsey	No Open Activity	06/07/2022 Correspondence by Amber McCort	No Ticklers Due

The screenshot shows the 'Person Search' interface in the Workforce One system. At the top, the 'WORKFORCE ONE' logo is on the left, and the user is logged in as 'pprovider - VRS: User'. A navigation bar includes 'Home', 'Search', 'My Tasks', 'Recent Work', 'Reports', 'References', 'Resources', and 'Help'. The search criteria section is titled 'Hide Search Criteria' and contains the following fields: 'Last Name' (empty), 'First Name' (empty), 'Middle Initial' (empty), 'Record ID' (empty), and 'Staff Assigned' (a dropdown menu currently showing 'Provider, Paul'). A 'Run Search' button is located below these fields. At the bottom of the search criteria section, there is a 'Show Search Results' link.

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.

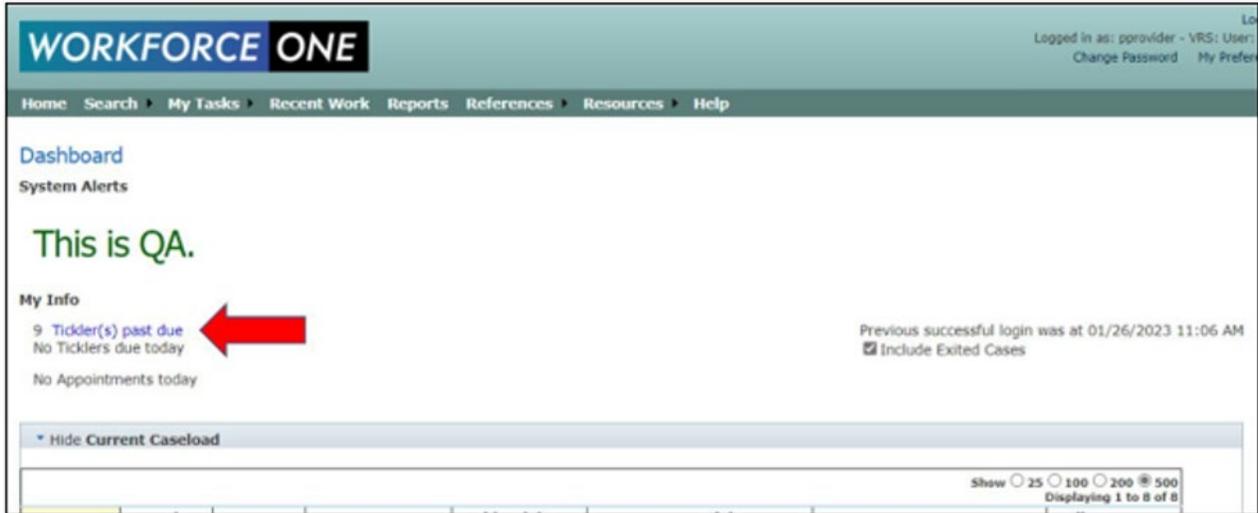
This screenshot shows the same 'Person Search' interface, but with search results displayed. The 'Record ID' field in the search criteria is populated with '202037997'. Below the search criteria, the 'Hide Search Results' section is expanded to show a table of results. The table has columns for 'Name: Birth Date', 'SSN', 'Record ID', 'City', and 'Current Staff Assigned'. One result is shown for 'Berry, Blue' with a birth date of '07/29/2000', SSN '7880', Record ID '202037997', City 'St. Paul', and Current Staff Assigned 'Nett, Michael J Provider, Paul'. The table also includes a 'Show' dropdown menu with options for 25, 100, 200, and 500 records, and a 'Displaying 1 to 1 of 1' indicator. At the bottom of the results section, there are 'New Search' and 'Refine Search' buttons.

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

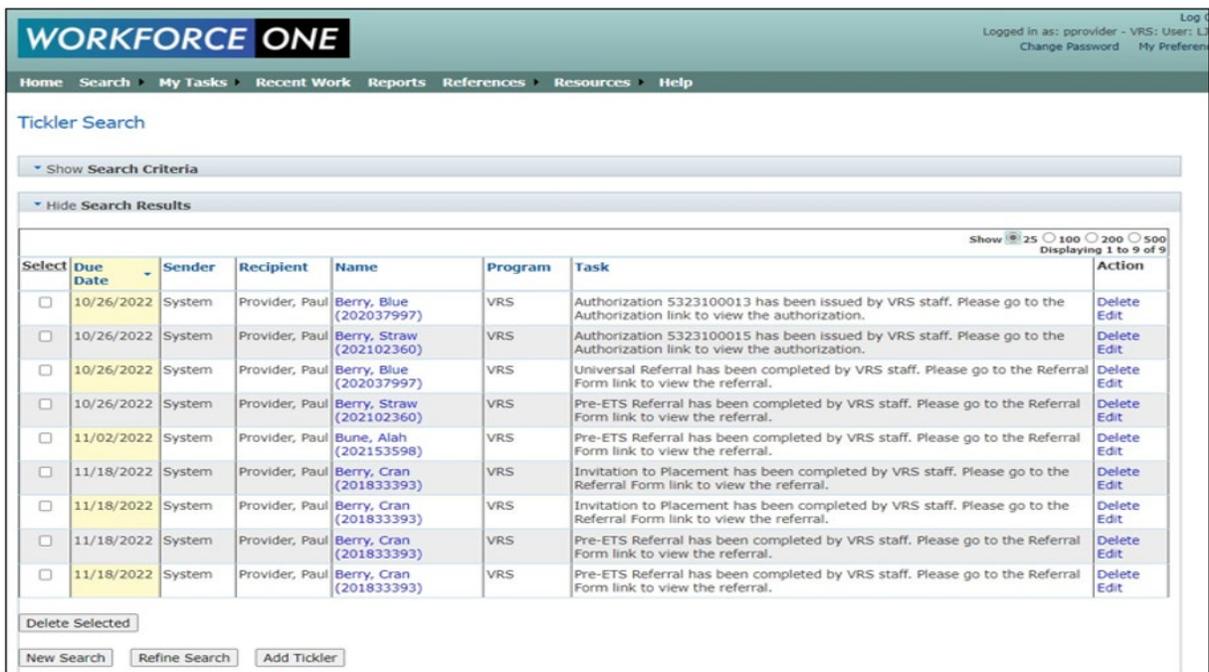
Ticklers

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.



Click the link and the following screen will appear:



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:

The screenshot displays the WORKFORCE ONE interface. At the top, the logo 'WORKFORCE ONE' is on the left, and 'Logged in as: pa' is on the right. Below the logo is a navigation bar with links: Home, Search, My Tasks, Recent Work, Reports, References, Resources, and Help. The main content area is titled 'Person At-A-Glance' and shows details for 'Happy Gilmore' with 'Record ID 202155761'. Below this, there are fields for 'Name' (Happy Gilmore) and 'Record ID' (202155761). A table follows with columns: Program, Status, Application Date, Accepted for Services Date, Exit Date, Closed from App Date, and Last Follow-up Date. The table contains one row: 'VRS Seq 1', 'Accepted for Services', '12/05/2022', '01/13/2023', and empty cells for the remaining columns. On the left, a navigation menu is shown with categories: General, At-A-Glance, Case Note, Cases, EDS, Service, and Form/Letter/Schedule. Under 'Form/Letter/Schedule', 'Referral Form' is highlighted with a red arrow pointing to it.

Any referral forms that VRS has completed to the Community Partner will display. Click the blue link under Referral Form and the following screen will appear:

Community Partner staff can review the information in the referral form 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.

WORKFORCE ONE Logged in as:

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 VRS Referral Form

1 of 1

Vocational Rehabilitation Services (VRS) Invitation to Placement

Name	Happy Gilmore	WF1 Record ID	202155761
Preferred Name		Pronouns	
This is an invitation for	General PBA/Job Placement		
Placement Professional	Goodwill Easter Seals	Invitation Date	05/10/2023
Job Goal	Golf Pro		
Address	123 Drive Way Apple Valley MN, 55124 Dakota County	Phone(s)	(651) 111-1111 (Cell)
E-mail	happy.gilmore@gmail.com	Transportation	Active Driver's License
Birth Date	11/11/1998	Age	24
Preferred Communication Style	Text	Is an Interpreter Required?	
Communication Considerations			
Guardian	Sunny Gilmore sgilmore@yahoo.com		
Referring VRS Staff	Laura Cheney Rehabilitation Services Apple Valley	Alternate VRS Staff	Heather Brown
VRS Staff Phone(s)	(952) 703-3182 (Work) (952) 210-2467 (Alternate)	Alternate VRS Staff Phone(s)	(952) 737-8356 (Work)
VRS Staff E-mail	laura.cheney@state.mn.us	Alternate VRS Staff E-mail	heather.brown@state.mn.us.xx
Primary Disability	Other Mental		
Functional Limitations Impacting Employment	Self-Care; Interpersonal Skills; Communication		
Work Hours per Week	20		

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
- 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			

following screen will appear:

The

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

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”**

m

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

T
he 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

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

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
Total Purchase Amount				\$3,800.00

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"**

The screenshot shows the Workforce One interface. The top navigation bar includes Home, Search, My Tasks, Recent Work, Reports, References, Resources, and Help. The left sidebar contains several sections: 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 displays 'Person At-A-Glance' for 'Happy Gilmore' with Record ID 202155761. Below this, a table lists program details.

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			

The following screen will appear:

Document Add

Happy Gilmore Record ID 202155761

Program Seq VRS Seq 1 (Accepted for Svcs) Help

*EDS Document Type None Selected

*Document Name Select EDS Document Type to populate

*Select a File Choose File No file chosen

Next Cancel

“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

[Help](#)

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

***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

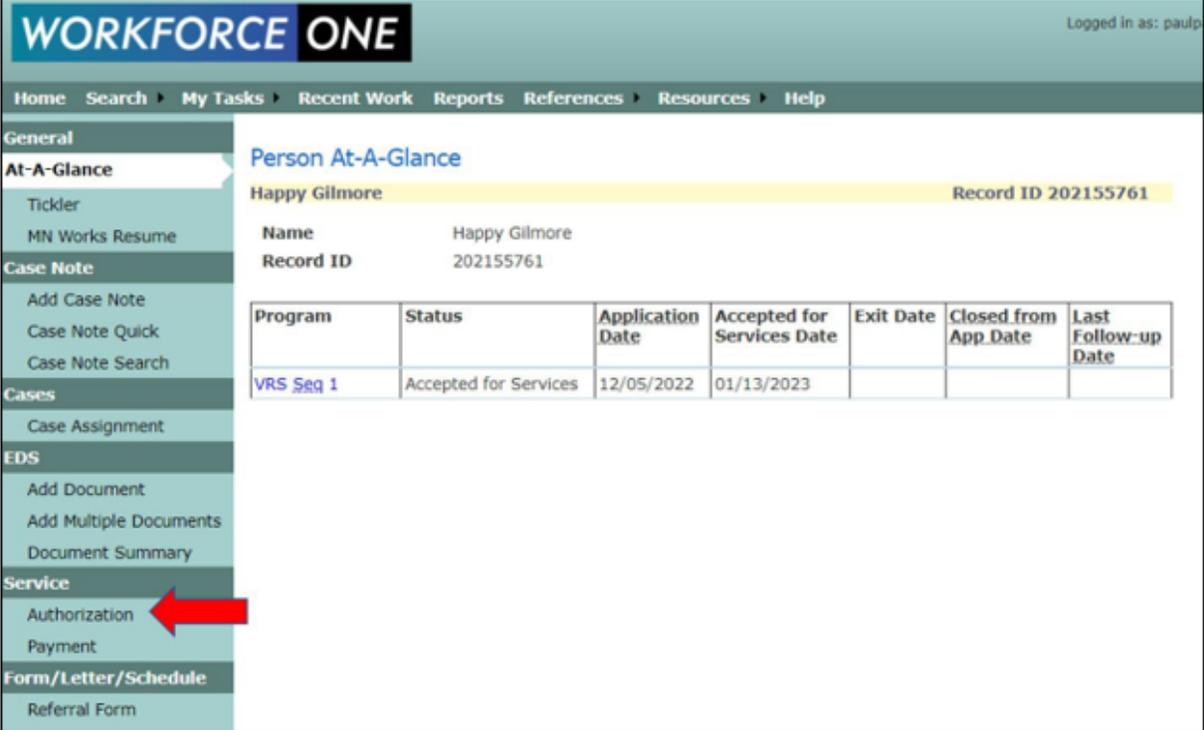
Add VRS Document

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”**



The screenshot displays the WORKFORCE ONE interface. The top navigation bar includes 'Home', 'Search', 'My Tasks', 'Recent Work', 'Reports', 'References', 'Resources', and 'Help'. The left sidebar contains a navigation menu with categories: General, At-A-Glance, Case Note, Cases, EDS, Service, and Form/Letter/Schedule. The 'At-A-Glance' section is active, showing 'Person At-A-Glance' for 'Happy Gilmore' with Record ID 202155761. Below this, a table lists services:

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			

The following screen will appear:

WORKFORCE ONE Logged in as: pak

Home Search My Tasks Recent Work Reports References Resources Help

General
At-A-Glance
Ticker
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

Program Seq VRS Seq 1 (Accepted for Svcs) [Help](#)

*EDS Document Type

*Document Name

*Select a File No file chosen

“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

Change Program, Document Type or File

*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 PO

SWIFT PO 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**
***Invoice Date**
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 ▼	\$
Totals	\$3,800.00	\$0.00	\$0.00	\$3,800.00		\$1,330.00

▼ Show Past Payments

▼ Show Payment Comment

▼ Show Case Note

“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: pau

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

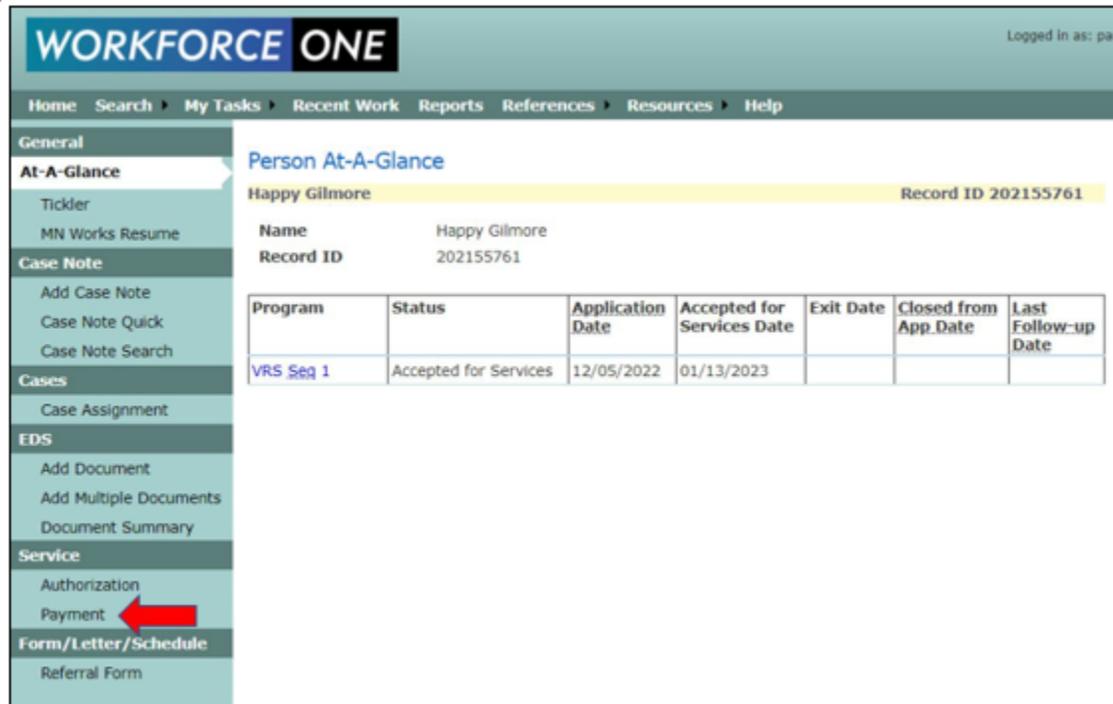
Auth Number	Service Title	Vendor	Issue Date	Start Date	End Date	Auth Amount	Auth Status	Action
5323100223	1. Signed Placement Plan Meeting (\$1,330); 2. Employment First Shift Completed (\$1,200); 3. Successful Placement Closure (\$1,270)	Goodwill Easter Seals	05/10/2023	05/10/2023	09/30/2023	\$3,800.00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



The screenshot shows the Workforce One interface. The top navigation bar includes Home, Search, My Tasks, Recent Work, Reports, References, Resources, and Help. The left sidebar contains a navigation menu with categories: General, At-A-Glance, Tickler, MN Works Resume, Case Note, Cases, EDS, Service, and Form/Letter/Schedule. The 'Payment' option under the Service category is highlighted with a red arrow. The main content area displays 'Person At-A-Glance' for Happy Gilmore (Record ID 202155761). Below this, there is a table with the following data:

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			

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	Edit

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 PO
SWIFT PO 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
TICKER
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 P

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

1 of 2

Authorization with Payments

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

Scroll down the page.

29 | Page

ROSEVILLE, MN 55113						ROSEVILLE, MN 55113			
Service Vendor FAX						(651) 481-1131			
1 - Intake Fee									
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	
Payment Detail for 1 - Intake Fee									
Payment Status:	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 LJ&A Employment Counseling &	Eh D Lay Heather Grummons	ROC-4277	EFT: 0007348630	441006	01884331	\$125.00		
2 - Social Coaching									
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	
Payment Detail for 2 - Social Coaching									
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”**

The screenshot shows the WORKFORCE ONE interface. The top navigation bar includes Home, Search, My Tasks, Recent Work, Reports, References, Resources, and Help. The left navigation menu is expanded, showing categories like General, At-A-Glance, Case Note, Cases, EDS, Service, and Form/Letter/Schedule. The 'Cases' category is selected, and a red arrow points to the 'Case Assignment' option. The main content area displays 'Person At-A-Glance' for Happy Gilmore (Record ID 202155761). Below this, there is a table with the following data:

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			

The following screen will appear:

WORKFORCE ONE Logged In as: pa

Home Search My Tasks Recent Work Reports References Resources Help

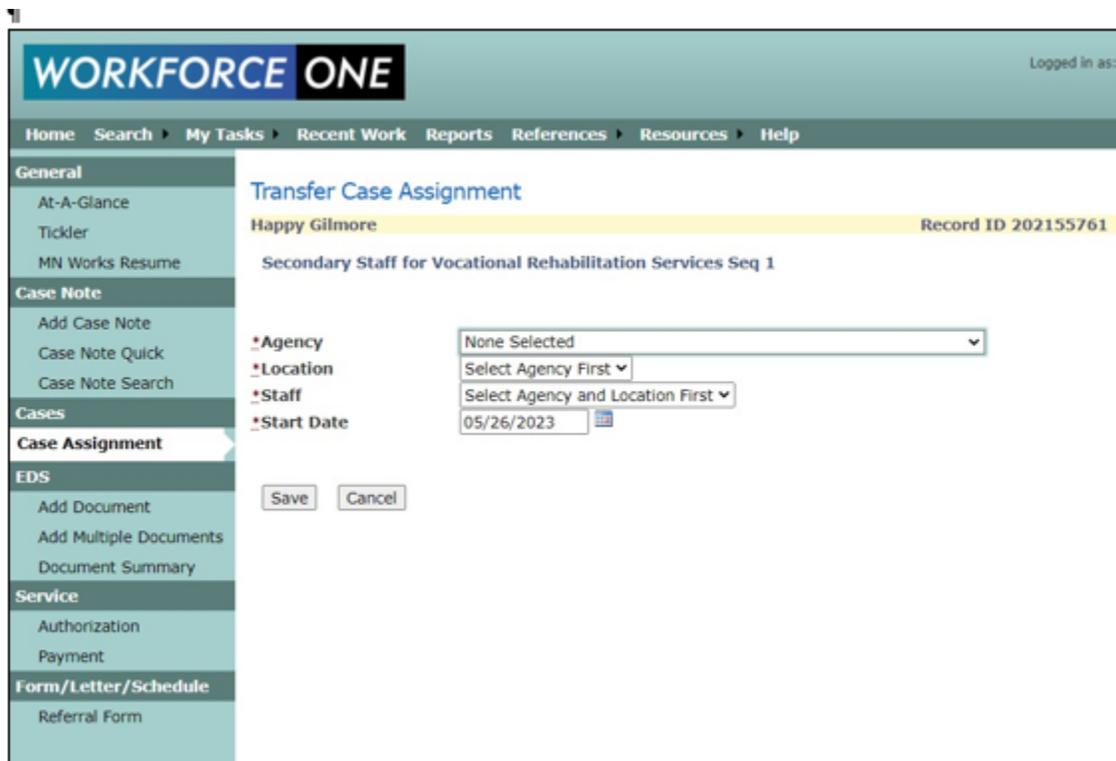
Case Assignment
Happy Gilmore Record ID 202155761

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

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



“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: 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		Transfer End 
Placement Staff				

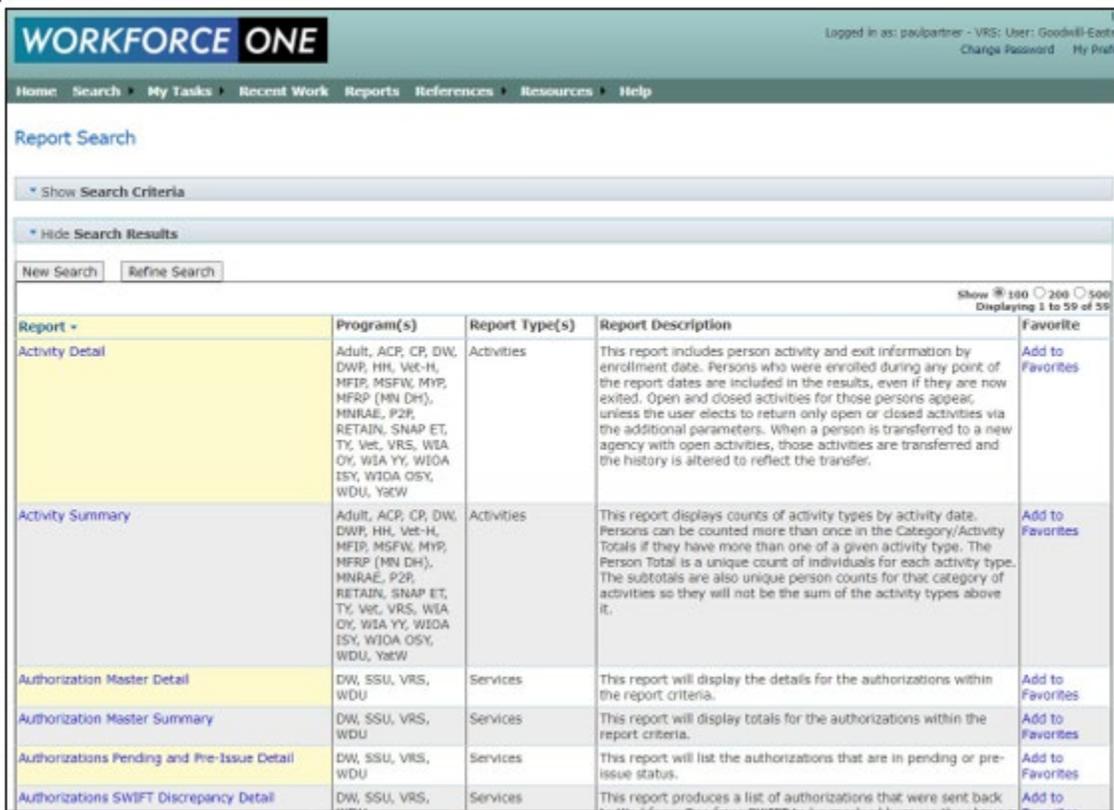
When all work is complete with a participant, Community Partner staff will end the case assignment by clicking **“End”**. This will end the case assignment and the Community Partner staff will no longer have access to the record.

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:



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

WORKFORCE ONE

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

Contractor Unpaid Authorizations 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 Contractor Unpaid Authorizations Detail Report

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

WORKFORCE ONE

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

Contractor Unpaid Authorizations 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 Goodwill-Easter Seals
Program Vocational Rehabilitation Services

Run Report Back to Report Search

▼ Show Contractor Unpaid Authorizations Detail Report

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

The screenshot shows the 'Contractor Unpaid Authorizations Detail Report' page in the Workforce One system. At the top, the Workforce One logo is on the left, and the user is logged in as 'paupartner - VRS: User: Goodwill-East'. Below the logo is a navigation bar with links for Home, Search, My Tasks, Recent Work, Reports, References, Resources, and Help. The main heading is 'Contractor Unpaid Authorizations Detail Report'. There are buttons for 'Show Initial Criteria', 'Run Report', 'Refine Criteria', and 'Back to Report Search'. A section titled 'Hide Contractor Unpaid Authorizations Detail Report' contains instructions: '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.' Below this are 'Scroll Left' and 'Scroll Right' buttons. A navigation bar shows '1 of 32' records. The main table is titled 'Contractor Unpaid Authorizations Detail' and has a 'Show/hide additional common criteria' checkbox. The table has the following columns: 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, and Primary Staff. The table contains four rows of data:

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 Hearing (\$1,330);2. Employment First Shift	Rosman Bangasser, Karen L.

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

This screenshot shows the same report page as above, but with an export menu open. The menu is triggered by clicking the disk icon in the navigation bar. The menu options are: Word, Excel, PDF, and CSV (comma delimited). A red arrow points to the 'Excel' option. The table header is partially visible at the bottom of the screenshot.

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

Report Search			
<input type="checkbox"/> Show Search Criteria <input type="checkbox"/> Hide Search Results <input type="button" value="New Search"/> <input type="button" value="Refine Search"/>			
			Show <input checked="" type="radio"/> 100 <input type="radio"/> 200 <input type="radio"/> 500 Displaying 1 to 59 of 59
Report -	Program(s)	Report Type(s)	Report Description
Activity Detail	ADULT, ACP, CP, DW, DWP, HH, Vet-H, MFRP, MSPW, MYP, 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, MFRP, MSPW, MYP, 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*

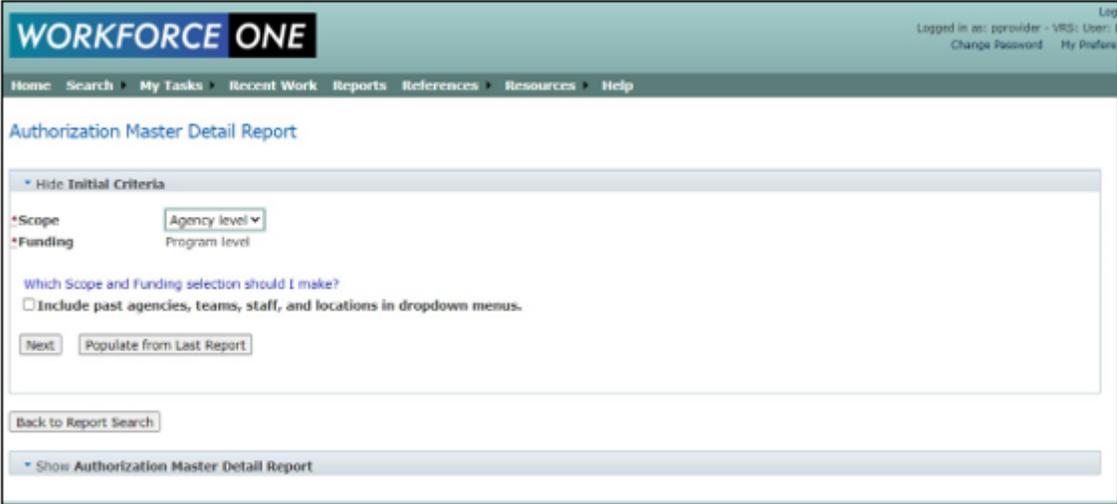
Authorizations Unpaid Summary

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.

[Type here]

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 for the Authorization Master Detail Report. The header includes the Workforce One logo and user information: "Logged in as: provider - VRS: User: Change Password My Profile". A navigation bar contains links for Home, Search, My Tasks, Recent Work, Reports, References, Resources, and Help. The main content area is titled "Authorization Master Detail Report" and features a "Hide Initial Criteria" section. This section includes 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 labeled "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 form is a "Back to Report Search" button. A "Show Authorization Master Detail Report" button is located at the very bottom of the interface.

Leave defaults and click **“Next”**

The screenshot shows a web application interface for generating an "Authorization Master Detail Report". At the top, there is a navigation menu with links for Home, Search, My Tasks, Recent Work, Reports, References, Resources, and Help. The main heading is "Authorization Master Detail Report". Below this, there are two sections for filtering criteria:

- Hide Initial Criteria:** Includes "Scope" (Agency level) and "Funding" (Program level). A note states: "Do not include past agencies, teams, staff, and locations in dropdown menus." A "Change Initial Criteria" button is present. The "Agency" is set to "LJSA", "Location" is "All Values", "Staff" is "All Values", and "Program" is "Vocational Rehabilitation Services".
- Hide Additional Criteria:** Includes "Federal Fiscal Year" (None Selected), "Remit To Vendor SWIFT ID" (empty), "Authorization Status" (All Values), "Service Type" (All Values), "Service Title" (All Values), and "Service Start Date From" and "Service Start Date To" (empty date pickers).

At the bottom, there are "Run Report" and "Back to Report Search" buttons, and a "Show Authorization Master Detail Report" button.

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"**

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)
Bresland, Alex F	St. Paul	St. Paul	Berry, Blue	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 PBA	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
McCort, 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.

[Type here]

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

The screenshot shows the Workforce One web application interface. At the top, the 'WORKFORCE ONE' logo is on the left, and the user is logged in as 'pprovider - VRS User' with options to 'Change Password' and 'My Preferences'. A navigation bar includes links for Home, Search, My Tasks, Recent Work, Reports, References, Resources, and Help. The main heading is 'Authorizations Unpaid Detail Report'. Below this is a section titled 'Hide Initial Criteria' containing two dropdown menus: 'Scope' set to 'Agency level' and 'Funding' set to 'Program level'. A question asks 'Which Scope and Funding selection should I make?' with a checkbox for 'Include past agencies, teams, staff, and locations in dropdown menus.' There are two buttons: 'Next' and 'Populate from Last Report'. A 'Back to Report Search' button is located below. At the bottom, there is a 'Show Authorizations Unpaid Detail Report' button. The footer contains the Workforce One logo, copyright information (©2022 WFL 0420), contact information (651-297-1111), and a build number (Build 2022.01.14-0).

Leave defaults and click **“Next”**

WORKFORCE ONE Logged in as: pprovider - VRS: User: [Log](#)
[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.

Agency LTRA
Location All Values
Staff All Values
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

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”**

