

# WORKFORCE ONE (WF1)

## Dislocated Worker and WIOA Adult

### Funding Stream and Performance Guidance

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# What's the Difference between PY and FY?

## NOTHING BUT A TITLE

Program Year (PY): Titled with the year it began

Fiscal Year (FY): Titled with the year it ends

## THIS MEANS

July 1, 2019 – June 30, 2020

IS Program Year 2019 AND Fiscal Year 2020

# REMINDER

## WHEN COMPLETING THE ENROLLMENT SCREEN OF WF1

You are **ONLY**

**ENROLLING** the participant into a **PROGRAM**

You are **NOT**

**Enrolling** the participant into a **funding source**

# REMINDER

If a participant will continue receiving a service financially supported by a grant that is no longer available

**DO NOT EXIT THEM**

**The only time a participant EXITS the program is after that participant has not received a service for 90 days**

(The exit date is retroactive back to the last date of service)

# REMINDER

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

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

- ❖ If there is a training activity on record, reports will look for a captured credential
- ❖ If there is not a credential captured, it will result in a negative in the Credential Attainment Rate

# WF1 ACTIVITIES INFORMATION

Activities capture the services you are providing your participant

**AND**

All of the funding sources that supported all of their services

# WF1 ACTIVITIES INFORMATION (CONTINUED)

## WF1 Activities track

- The date range each funding source was used to support each service (Activity Start and End Date)
- The types of funding sources used to support each service (State formula, WIOA formula, Mass Layoff Project, DWG funded)
- The specific grant used to support each service (Specific program year allocation used or project name accessed)

# WF1 ACTIVITIES INFORMATION (CONTINUED)

**The funding stream selected within each activity captures the funding source used to support THAT service during THAT activity's start and end date**

- Most participants are eligible for multiple funding sources
- Most participants access more than one fiscal year allocation (formula/small layoff grant funding stream) during their enrollment period and sometimes they access multiple at the same time
- Some participants also access projects and DWGs during their enrollment depending on their need and their eligibility

# Each Program Year Formula Allocation

HAS A  
TWO YEAR  
GRANT PERIOD

# Available WDA Allocations During Program Year 2018

## July 1, 2018 – June 30, 2019: WIOA Adult Formula Allocations

WIOA Adult Program Year 2017

WIOA Adult Program Year 2018

## July 1, 2018 – June 30, 2019: Dislocated Worker Formula Allocations

WIOA DW Program Year 2017

WIOA DW Program Year 2018

State DW Program Year 2017

State DW Program Year 2018

# Available WDA Allocations During Program Year 2019

## July 1, 2019 – June 30, 2020: **WIOA Adult Formula** Allocations

WIOA Adult Program Year 2018

WIOA Adult Program Year 2019

## July 1, 2019 – June 30, 2020: **Dislocated Worker Formula** Allocations

WIOA DW Program Year 2018

WIOA DW Program Year 2019

State DW Program Year 2018

State DW Program Year 2019

# Available WDA Allocations During Program Year 2020

## July 1, 2020 – June 30, 2021: **WIOA Adult Formula** Allocations

WIOA Adult Program Year 2019

WIOA Adult Program Year 2020

## July 1, 2020 – June 30, 2021: **Dislocated Worker Formula** Allocations

WIOA DW Program Year 2019

WIOA DW Program Year 2020

State DW Program Year 2019

State DW Program Year 2020

# WIOA Adult Allocation Naming Convention

## WIOA Adult Allocations

- PY2017 = “WIOA AD Formula – State-wide” (Last Year in Use)  
Grant is active July 1, 2017 – June 30, 2019
- PY2018 = “Henn/Carver WDA-09 PY18 WIOA Adult Formula”  
Grant is active July 1, 2018 – June 30, 2020
- PY2019 = “Henn/Carver WDA-09 PY19 WIOA Adult Formula”  
Grant is active July 1, 2019 – June 30, 2021
- PY2020 = “Henn/Carver WDA-09 PY20 WIOA Adult Formula”  
Grant is active July 1, 2020 – June 30, 2022

# WIOA DW Allocation Naming Convention

## WIOA Dislocated Worker Allocations

- PY2017 = “WIOA DW Formula - State-wide” (Last Year in Use)  
Grant is active July 1, 2017 – June 30, 2019
- PY2018 = “Henn/Carver WDA-09 PY18 WIOA DW Formula”  
Grant is active July 1, 2018 – June 30, 2020
- PY2019 = “Henn/Carver WDA-09 PY19 WIOA DW Formula”  
Grant is active July 1, 2019 – June 30, 2021
- PY2020 = “Henn/Carver WDA-09 PY20 WIOA DW Formula”  
Grant is active July 1, 2020 – June 30, 2022

# State DW Allocation Naming Convention

## STATE Dislocated Worker

- PY2017 = “State DW Formula - State-wide” (Last Year in Use)  
Grant is active July 1, 2017 – June 30, 2019
- PY2018 = “Henn/Carver WDA-09 PY18 State DW Formula”  
Grant is active July 1, 2018 – June 30, 2020
- PY2019 = “Henn/Carver WDA-09 PY19 State DW Formula”  
Grant is active July 1, 2019 – June 30, 2021
- PY2020 = “Henn/Carver WDA-09 PY20 State DW Formula”  
Grant is active July 1, 2020 – June 30, 2022

# When to Update Activities with New Funding Information

**Whenever the current funding stream within the activity will no longer be used to support that service**

**FOR ANY REASON**

# MOST COMMON REASON NUMBER ONE

## **A Program Year Allocation is spent out before its expiration date**

- This means the money your location received at the beginning of a program year was fully spent out (expended) before the two year timeframe allowed
- Since there is no money left in that funding stream, you will need to close all activities showing that funding stream as its funding source
- If those participants will continue receiving any of those services, you will need to open new activities showing the funding source taking over payments for those continued services

# MOST COMMON REASON NUMBER TWO

## **A Program Year Allocation reaches its expiration date**

- This means the money your location received at the beginning of a program year two years ago is no longer available. It has reached its expiration date.
- Since the grant is no longer active (it has closed), you will need to close all activities showing that funding stream as its funding source
- If those participants will continue receiving any of those services, you will need to open new activities showing the funding source taking over payments for those continued services

# Activity Data Entry Timeliness Policy

**Closeout:** 100% of all WF1 activities with a funding source no longer available must be closed within 15 business days that funding source became unavailable

(Close date is retroactive to the last date the old funding source was available)

**Continuing Services:** 100% of all activities closed out that will continue with a different funding source must be opened within 15 business days the previous funding source closed

(Start date is retroactive to the date the new funding source began)

**REMEMBER:** *Since there was no gap in service, there should not be a gap between the old activity end date and the new activity start date*

# How to Find Cases using Old Funding Streams

**Activity Detail Report**

▼ Hide Initial Criteria

**Scope** Agency level  
**Funding** Funding Stream level

Do not include past programs, projects, staff, agencies, and locations in criteria dropdown selections.

Change Initial Criteria

**Agency** Hennepin County  
**Location** All Values ▼  
Select/Deselect

**Staff** All Values ▼  
Select/Deselect

**\*Funding Stream** None Selected ▼  
Select/Deselect

To select more than one click on "Select/Deselect"

Find the “Activity Detail Report”, select the “Funding Stream level” scope, and click on “Select/Deselect” below the Funding Stream option box

# How to Find Cases using Old Funding Streams (continued)

The screenshot shows a search interface for finding cases. At the top, the 'Funding Stream' is set to 'State DW Formula - State-wide; WIOA DW Formula - State-wide'. Below this, there is a section for 'Additional Criteria' which is currently hidden. The criteria include: 'Date Type' set to 'Served', 'Served Start Date' set to '06/30/2019', 'Served End Date' set to '07/01/2019', 'Activity Status' set to 'Open', 'Activity Type' set to 'All Values', 'Residence County' set to 'All Values', 'TAA Inclusion' set to 'No', and 'Service Model' set to 'All Values'. At the bottom, there are two buttons: 'Run Report' and 'Back to Report Search'. Three red callout boxes provide instructions: one points to the 'Funding Stream' field with the text 'Select Old Funding Streams', another points to the 'Activity Status' dropdown with the text 'You only need "OPEN" activities', and a third points to the 'Run Report' button with the text 'Click "Run Report"'. The 'Run Report' button is highlighted with a red border.

After you have selected the old funding streams you want the report on, select the criteria needed to see all open activities, click “Run Report”

# How to Find Cases using Old Funding Streams (continued)

Activity Detail Report

▼ Show **Initial Criteria**

▼ Show **Additional Criteria**

Run Report   Refine Criteria   Back to Report Search

▼ Hide **Activity 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.

1 of 3   100%   Find | Next

**WORKFORCE ONE**   **Activity Detail**

Show/hide additional common criteria

Agency	Person Name	Record ID	Prog/Seq	Act Type	Sub Type	Success?	Act Start	Days Open	Act End	Staff Assigned	Exit Re
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To export the report and save the data to your computer desktop

1. Click on the floppy disk icon

2. Select the format you want saved

# Find the Services Supported by the Old Funding Source with the Case Record

▼ Hide Dislocated Worker Seq 1 - Enrolled

Enrollment Date: 05/02/2019 Exit Date:

Activity: Subtype: Work Exp Type	Funding Stream	Start Date/ End Date	Staff: Agency	Action
Classroom Trng	State DW Formula - State-wide	05/02/2019 Open	Amy Carlson	Edit Delete Copy
Staff Assist JS In	Henn/Carver WDA-09 PY18 WIOA DW Formula	05/19/2019 Open	Amy Carlson	Edit Delete Copy
Career Counseling	Henn/Carver WDA-09 PY18 State DW Formula	05/19/2019 Open	Amy Carlson	Edit Delete Copy
Staff Assist Assess	Henn/Carver WDA-09 PY18 State DW Formula	05/02/2019 Open	Amy Carlson	Edit Delete Copy

PY17 State DW →

PY18 WIOA DW →

PY18 State DW →

PY18 State DW →

PY17 funding end date = 06/30/2019

# Data Entry for Services CONTINUING under a New Funding Source

▼ Hide Dislocated Worker Seq 1 - Enrolled

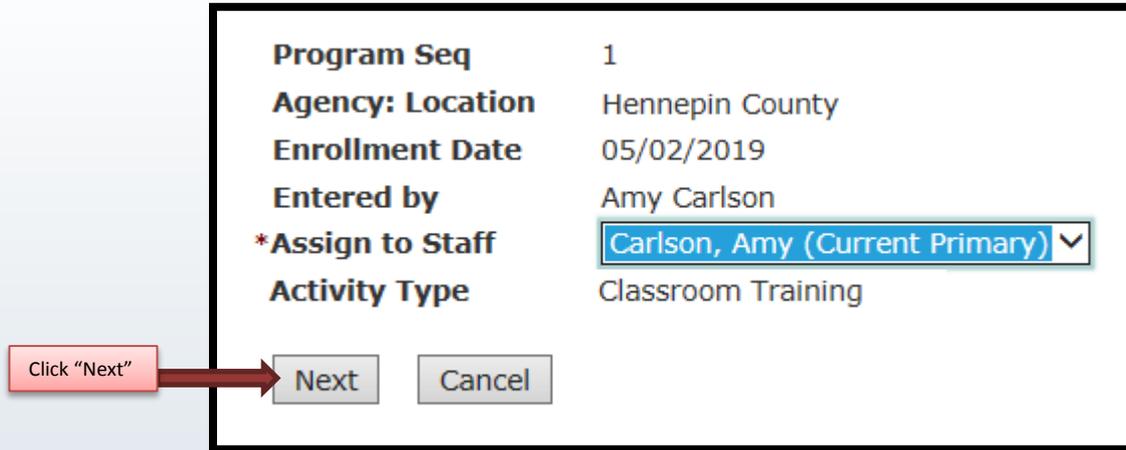
Enrollment Date: 05/02/2019 Exit Date:

Activity: Subtype: Work Exp Type	Funding Stream	Start Date/ End Date	Staff: Agency	Action
Classroom Trng	State DW Formula - State-wide	05/02/2019 Open	Amy Carlson	Edit Delete Copy
Staff Assist JS In	Henn/Carver WDA-09 PY18 WIOA DW Formula	05/19/2019 Open	Amy Carlson	Edit Delete Copy
Career Counseling	Henn/Carver WDA-09 PY18 State DW Formula	05/19/2019 Open	Amy Carlson	Edit Delete Copy
Staff Assist Assess	Henn/Carver WDA-09 PY18 State DW Formula	05/02/2019 Open	Amy Carlson	Edit Delete Copy

Click "Copy"

If the participant WILL continue receiving this service click on "COPY" in the "Action" column of the activity line currently supported by old funds

# Data Entry for Services CONTINUING under a New Funding Source (Continued)



The screenshot shows a data entry form with the following fields and values:

Program Seq	1
Agency: Location	Hennepin County
Enrollment Date	05/02/2019
Entered by	Amy Carlson
*Assign to Staff	Carlson, Amy (Current Primary) ▼
Activity Type	Classroom Training

At the bottom of the form, there are two buttons: "Next" and "Cancel". A red callout box with the text "Click 'Next'" and an arrow points to the "Next" button.

## When copying an activity

Most of the original activity details will automatically transfer to the new activity  
Make sure to update as needed

# Data Entry for Services CONTINUING under a New Funding Source (Continued)

<b>Program Seq</b>	1
<b>Agency: Location</b>	Hennepin County
<b>Enrollment Date</b>	05/02/2019
<b>Entered by</b>	Amy Carlson
<b>Assign to Staff</b>	Carlson, Amy (Current Primary)
<b>Activity Type</b>	Classroom Training
<b>Hide Open Activity</b>	
<b>*Start Date</b>	<input type="text" value="07/01/2019"/> 
<b>Estimated End Date</b>	<input type="text"/> 
<b>*Funding Stream</b>	<input type="text" value="Henn/Carver WDA-09 PY18 State DW Formula"/> 

Step 1



Step 2



1. Enter the date the new funding source will begin supporting the service
2. Select the new funding source supporting the service

# Data Entry for Services CONTINUING under a New Funding Source (Continued)

Step 1

\*Estimated Attainment Date

\*Pell Grant Recipient

▼ Show Comments

▼ Show Case Note

▼ Hide Close Activity

End Date

Actual Cost \$

Completion Results

Actual Hours

Step 2

Save Save and Open New Activity Cancel

1. Enter the Estimated Attainment Date (for training activities). All other information from the original activity will automatically be entered into the activity. Make sure to update information as needed.

2. Click “Save”

# After the Original Activity was Copied and/or for Services NOT Continuing

▼ Hide Dislocated Worker Seq 1 - Enrolled

Enrollment Date: 05/02/2019 Exit Date:

Activity: Subtype: Work Exp Type	Funding Stream	Start Date/ End Date	Staff: Agency	Action
Classroom Trng	Henn/Carver WDA-09 PY18 State DW Formula	07/01/2019 Open	Amy Carlson	Edit Delete Copy
Classroom Trng	State DW Formula - State-wide	05/02/2019 Open	Amy Carlson	Edit Delete Copy
Staff Assist JS In	Henn/Carver WDA-09 PY18 WIOA DW Formula	05/19/2019 Open	Amy Carlson	Edit Delete Copy
Career Counseling	Henn/Carver WDA-09 PY18 State DW Formula	05/19/2019 Open	Amy Carlson	Edit Delete Copy
Staff Assist Assess	Henn/Carver WDA-09 PY18 State DW Formula	05/02/2019 Open	Amy Carlson	Edit Delete Copy

Click "Edit"

If you **have already copied** the continuing service AND/OR if the participant **will NOT CONTINUE** receiving the service click on **"EDIT"** in the "Action" column of the activity line that is currently supported by the funding stream no longer supporting it OR the activity they will not be continuing

# REQUIRED WF1 ACTIVITY DATA ENTRY (CONTINUED)

The screenshot shows a web form with three sections: 'Show Comments', 'Show Case Note', and 'Hide Close Activity'. The 'Hide Close Activity' section contains four input fields: 'End Date' (06/30/2019), 'Actual Cost \$' (15000), 'Completion Results' (Successful), and 'Actual Hours' (120). At the bottom are three buttons: 'Save', 'Save and Open New Activity', and 'Cancel'. Three red boxes labeled 'Step 1', 'Step 2', and 'Step 3' have arrows pointing to the 'End Date', 'Actual Cost \$', and 'Save' buttons respectively.

▼ Show Comments			
▼ Show Case Note			
▼ Hide Close Activity			
End Date	<input type="text" value="06/30/2019"/>	Completion Results	<input type="text" value="Successful"/>
Actual Cost \$	<input type="text" value="15000"/>	Actual Hours	<input type="text" value="120"/>
Save	Save and Open New Activity	Cancel	

**1.** Scroll to the bottom of the screen and enter the date the old funding stream stopped supporting the service **OR** the date the participant stopped receiving the service then enter the participant’s completion results.

(If the service is continuing under a new funding source, the participant must be currently successful or you would not be approving its continuation.)

**2.** Enter the actual cost and hours of the service

**3.** Click “Save”

# THE RECORD IS NOW TRACKING ALL FUNDING SOURCES USED TO SUPPORT IT

▼ Hide Dislocated Worker Seq 1 - Enrolled

Enrollment Date: 05/02/2019 Exit Date:

Activity: Subtype: Work Exp Type	Funding Stream	Start Date/ End Date	Staff: Age	Action
Classroom Trng	Henn/Carver WDA-09 PY18 State DW Formula	07/01/2019 Open	Amy Carlson	Edit Delete Copy
Staff Assist JS In	Henn/Carver WDA-09 PY18 WIOA DW Formula	05/19/2019 Open	Amy Carlson	Edit Delete Copy
Career Counseling	Henn/Carver WDA-09 PY18 State DW Formula	05/19/2019 Open	Amy Carlson	Edit Delete Copy
Staff Assist Assess	Henn/Carver WDA-09 PY18 State DW Formula	05/02/2019 Open	Amy Carlson	Edit Delete Copy
Classroom Trng	State DW Formula - State-wide	05/02/2019 06/30/2019	Amy Carlson	Edit Delete Copy Reopen

1. NEW ACTIVITY

2. OLD ACTIVITY

1. The new activity is now open with the date its funding stream started financially supporting the service

2. The old activity is now closed with the date the old funding stream stopped financially supporting it

# DISLOCATED WORKER AND ITS CONNECTION WITH TAA SERVICES

TAA activities are **NOT** associated with Dislocated Worker funding

TAA Specialists **DO NOT** have the ability to capture credentials in WF1:  
If your dislocated worker has a training activity on their case with any funding source you are responsible for capturing the credential

TAA Specialists **DO NOT** have the ability to capture Measurable Skill Gains:  
If your dislocated worker has a training activity on their case with any funding source you are responsible for capturing the MSG

TAA activities must be closed **BEFORE** a DW case can be exited from WF1

# How to Complete an Activity Plan

## Form 4. Activity Plan

Please complete this quarterly table by filling in your plan in cumulative fashion (for example, the 3<sup>rd</sup> quarter should equal the 1<sup>st</sup> quarter plus the 2<sup>nd</sup> quarter). For quarters already completed, please use actual enrollment number as recorded in Workforce One. Step-by-Step instructions on how to pull quarterly data is included in Appendix A, or available by contacting Amy Carlson ([amy.carlson@state.mn.us](mailto:amy.carlson@state.mn.us)). Add or subtract additional quarters if necessary to reflect your grant terms.

Career Services are billed to cost category **857** on RPRs/FSRs. For a definition of Career Services and related activities, please see “General Definitions” beginning on Page 13.

Direct Training Services are billed to cost category **838** on RPRs/FSRs. For a definition of Direct Training Services and related activities, please see “General Definitions” beginning on Page 13.

	Grant Start Date through 1 <sup>st</sup> Quarter	Grant Start Date through 2 <sup>nd</sup> Quarter	Grant Start Date through 3 <sup>rd</sup> Quarter	Grant Start Date through 4 <sup>th</sup> Quarter	Grant Start Date through 5 <sup>th</sup> Quarter	Grant Start Date through 6 <sup>th</sup> Quarter	Grant Start Date through 7 <sup>th</sup> Quarter	Grant Start Date through 8 <sup>th</sup> Quarter
(857) Individual Plan Development								
(857) Staff Assisted Assessments								
(857) Staff Assisted Job Search								
(857) Career Counseling								
(857) Work Experience								
(857) Pre-Vocational Services								
(857) Work Readiness Services								
(838) Non-Credentialed Training								
(838) Classroom Training								
(838) Customized Training								
(838) CLIMB Training or Consulting								
(838) Incumbent Worker Training								
(838) OJT Public or Private								
(838) Apprenticeships								

This Activity Plan is required in the following grant documents:

“Planning Document”

“Modification Request Form”

“Mass Layoff Project Planning Document”

# Reports on Specific Funding Streams

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

## Report Search

▼ Show Search Criteria

▼ Hide Search Results

New Search Refine Search

Report ▼	Program(s)	Report Type(s)	Report Descripti
Activity Detail	Adult, ACP, CP, DW, DWP, HH, MFIP, MSFW, MN DH, MYP, SNAP ET, TY, Vet, VRS, WIA OY, WIA YY, WIOA ISY, WIOA OSY, WDU, YatW	Activities	This report include report dates are in the user elects to r with open activities
Activity Employment Detail	Adult, ACP, CP, DW, DWP, HH, MFIP, MSFW, MYP, SNAP ET, TY, Vet, WIA OY, WIA YY, WIOA ISY, WIOA OSY, YatW	Activities, Employment	This report include displayed.
Activity Summary	Adult, ACP, CP, DW, DWP, HH, MFIP, MSFW, MN DH, MYP, SNAP ET, TY, Vet, VRS, WIA OY	Activities	This report display Totals if they have The subtotals are a

**1.** Log into WF1 then click on “Reports” within the top panel

**2.** Select the “Activity Summary” Report

# Reports on Specific Funding Streams

The screenshot shows the 'Activity Summary Report' configuration page in the WORKFORCE ONE system. The page has a navigation bar with links: Home, Search, My Tasks, Recent Work, Manage Case, Manage Program, Reports, References, Resources, and Help. Below the navigation bar is the title 'Activity Summary Report'. A section titled 'Hide Initial Criteria' contains a dropdown menu for 'Funding' with options: Program level, Funding Stream Category level, Funding Stream level (highlighted), and Custom Program level. A red arrow labeled 'Step 1' points to the 'Funding Stream level' option. Below the dropdown is a question: 'Which Scope and Funding selection should I make?'. A checkbox labeled 'Include past programs, projects, staff, agencies, and locations in criteria dropdown selections.' is present. A red arrow labeled 'Step 2' points to this checkbox. Below the checkbox is a 'Next' button. A red arrow labeled 'Step 3' points to the 'Next' button. At the bottom of the page, there is a 'Back to Report Search' button and a 'Show Activity Detail Report' button. The footer contains the logo for Minnesota (m) and the text '©2018 MN DEED' and 'For login issues, call 651-355-0500. For all other WF1 issues, submit a service desk ticket: <https://apps.deed.state.mn.us>'.

1. Select “Funding Stream level” as the initial criteria for Funding
2. Click in the box to include funding streams that are no longer active
3. Click “Next”

# Reports on Specific Funding Streams (Q1)

**Activity Summary Report**

▼ Hide Initial Criteria

**Scope** COFFR level  
**Funding** Funding Stream level

Do not include past programs, projects, staff, agencies, and locations in criteria dropdown selections.

\***COFFR** Hennepin/Carver ETC - LWDA 09  
[Select/Deselect](#)

\***Funding Stream** Henn/Carver WDA-09 PY18 State DW Formula ✓  
[Select/Deselect](#)

▼ Hide Additional Criteria

\***Date Type** Activity ▼

\***Activity Start Date** 07/01/2018   **Activity End Date** 09/30/2018

**Residence County** All Values ▼  
[Select/Deselect](#)

**Service Model** All Values  
[Select/Deselect](#)

**1.** Select the funding stream you want the report to capture

**2.** Select the Date Type of “Activity”

**3.** Enter the date range you want the data to show (quarter 1 = 07/01 through 09/30)

**4.** Click “Run Report”

# Reports on Specific Funding Streams (Q1)

<b>WORKFORCE ONE</b>		<b>Activity Summary</b>				
<b>Activity</b>	<b>Currently Open</b>	<b>Currently Closed</b>	<b>Successfully Completed</b>	<b>Category / Activity Total</b>	<b>Person Total</b>	
Career Counseling	1	0	0	1	1	
Staff Assist Assess	0	1	1	1	1	
Staff Assist JS In	1	0	0	1	1	
Individual Career - Total	2	1	1	3	1	
Classroom Trng	8	4	4	12	12	
Cred Attain w/o Trng	0	1	1	1	1	
Training, Cred - Total	8	5	5	13	13	
Non-Cred Trng	2	0	0	2	2	
Training, Non-Cred - Total	2	0	0	2	2	
<b>Enrollments - Total</b>					<b>16</b>	

1. "Person Total" Column gives you unique counts of participants accessing that service using that funding stream

2. Enrollment Total gives you the unique count accessing that funding stream

Data for 07/01/2018 – 09/30/2018

# Reports on Specific Funding Streams (Q1)

	Grant Start Date through 1 <sup>st</sup> Quarter
(857) Individual Plan Development	0
(857) Staff Assisted Assessments	1
(857) Staff Assisted Job Search	1
(857) Career Counseling	1
(857) Work Experience	0
(857) Pre-Vocational Services	0
(857) Work Readiness Services	0
(838) Non-Credentialed Training	2
(838) Classroom Training	12
(838) Customized Training	0
(838) CLIMB Training or Consulting	0
(838) Incumbent Worker Training	0
(838) OJT Public or Private	0
(838) Apprenticeships	0

**07/01/2018 – 09/30/2018**  
**Has been entered accurately**

**Now move on to Quarter 2**

# Reports on Specific Funding Streams (Q2)

The screenshot shows the 'Activity Summary Report' interface. At the top, there are two expandable sections: 'Show Initial Criteria' and 'Hide Additional Criteria'. Below these, there are several filter fields: 'Date Type' (set to 'Activity'), 'Activity Start Date' (set to '07/01/2018'), 'Activity End Date' (set to '12/31/2018'), 'Residence County' (set to 'All Values'), and 'Service Model' (set to 'All Values'). Each date field has a calendar icon. Below the filters are three buttons: 'Run Report', 'Refine Criteria', and 'Back to Report Search'. Two red callout boxes with arrows provide instructions: one points to the 'Activity End Date' field with the text '1. Quarter 2 ends 12/31/2018', and the other points to the 'Run Report' button with the text '2. Click "Run Report"'. The 'Run Report' button is highlighted with a red arrow.

Keep the start date as the first date of the grant period and change the end date to the last day of the quarter you want data on (Quarter 2 ends 12/31/2018)

# Reports on Specific Funding Streams (Q2)

Activity	Currently Open	Currently Closed	Successfully Completed	Category / Activity Total	Person Total
Career Counseling	93	33	30	126	126
CLIMB Consult	11	2	1	13	13
CLIMB Trng	4	0	0	4	4
Indv Plan Dvpmt	92	34	30	126	126
Staff Assist Assess	1	17	16	18	18
Staff Assist JS In	76	32	29	108	108
Individual Career - Total	277	118	106	395	128
Holding	0	3	2	3	3
Local Flag	5	3	3	8	7
None - Total	5	6	5	11	10
Classroom Trng	19	9	9	28	28
Cred Attain w/o Trng	0	1	1	1	1
Training, Cred - Total	19	10	10	29	29
Non-Cred Trng	3	2	0	5	4
Training, Non-Cred - Total	3	2	0	5	4
Enrollments - Total					128

1. "Person Total" Column gives you unique counts of participants accessing that service using that funding stream

2. Enrollment Total gives you the unique count accessing that funding stream

Data for 07/01/2018 – 12/31/2018

# Reports on Specific Funding Streams (Q1)

	Grant Start Date through 1 <sup>st</sup> Quarter	Grant Start Date through 2 <sup>nd</sup> Quarter
(857) Individual Plan Development	0	126
(857) Staff Assisted Assessments	1	18
(857) Staff Assisted Job Search	1	108
(857) Career Counseling	1	126
(857) Work Experience	0	0
(857) Pre-Vocational Services	0	0
(857) Work Readiness Services	0	0
(838) Non-Credentialed Training	2	4
(838) Classroom Training	12	28
(838) Customized Training	0	0
(838) CLIMB Training or Consulting	0	?
(838) Incumbent Worker Training	0	0
(838) OJT Public or Private	0	0
(838) Apprenticeships	0	0

**07/01/2018 – 12/31/2018**

**Is still missing data**

**You need the unique count of participants accessing**

**CLIMB**

**(You'll need to drill into the Activity Summary Report)**

# Reports on Specific Funding Streams (Q2)

Activity	Currently Open	Currently Closed	Successfully Completed	Category / Activity Total	Person Total
<a href="#">Career Counseling</a>	93	33	30	126	126
<a href="#">CLIMB Consult</a>	11	2	1	13	13
<a href="#">CLIMB Trng</a>	4	0	0	4	4
<a href="#">Indv Plan Dvpmt</a>	92	34	30	126	126
<a href="#">Staff Assist Assess</a>	1	17	16	18	18
<a href="#">Staff Assist JS In</a>	76	32	29	108	108
Individual Career - Total	277	118	106	395	128
<a href="#">Holding</a>	0	3	2	3	3
<a href="#">Local Flag</a>	5	3	3	8	7
None - Total	5	6	5	11	10
<a href="#">Classroom Trng</a>	19	9	9	28	28
<a href="#">Cred Attain w/o Trng</a>	0	1	1	1	1
Training, Cred - Total	19	10	10	29	29
<a href="#">Non-Cred Trng</a>	3	2	0	5	4
Training, Non-Cred - Total	3	2	0	5	4
Enrollments - Total					128

Click on the "CLIMB Consult" activity to get the list of IDs accessing that service

# Reports on Specific Funding Streams (Q2)

(continued)

Activity Detail Report

▼ Show **Initial Criteria**

▼ Show **Additional Criteria**

Run Report Refine Criteria Back to Report Search

▼ Hide **Activity 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.

1 of 3 100% Find | Next 

**WORKFORCE ONE** Activity Detail

Show/hide additional common criteria

Agency	Person Name	Record ID	Prog/Seq	Act Type	Sub Type	Success?	Act Start	Days Open	Act End	Staff Assigned	Exit Re
--------	-------------	-----------	----------	----------	----------	----------	-----------	-----------	---------	----------------	---------

To export the report and save the data to your computer desktop

1. Click on the floppy disk icon

2. Select the format you want saved

# Reports on Specific Funding Streams (Q2)

Activity	Currently Open	Currently Closed	Successfully Completed	Category / Activity Total	Person Total
Career Counseling	93	33	30	126	126
CLIMB Consult	11	2	1	13	13
CLIMB Trng	4	0	0	4	4
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Individual Career	277	118	106	395	128
Holding	0	3	2	3	3
Local Flag	5	3	3	8	7
None - Total	5	6	5	11	10
Classroom Trng	19	9	9	28	28
Cred Attain w/o Trng	0	1	1	1	1
Training, Cred - Total	19	10	10	29	29
Non-Cred Trng	3	2	0	5	4
Training, Non-Cred - Total	3	2	0	5	4
Enrollments - Total					128

Click on the "CLIMB Trng" activity to get the list of IDs accessing that service

# Reports on Specific Funding Streams (Q2)

(continued)

Activity Detail Report

▼ Show **Initial Criteria**

▼ Show **Additional Criteria**

Run Report Refine Criteria Back to Report Search

▼ Hide **Activity 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.

1 of 3 100% Find | Next

**WORKFORCE ONE** Activity Detail

Show/hide additional common criteria

Agency	Person Name	Record ID	Prog/Seq	Act Type	Sub Type	Success?	Act Start	Days Open	Act End	Staff Assigned	Exit Re
--------	-------------	-----------	----------	----------	----------	----------	-----------	-----------	---------	----------------	---------

To export the report and save the data to your computer desktop

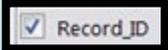
1. Click on the floppy disk icon

2. Select the format you want saved

# Reports on Specific Funding Streams (Q2)

(continued)

The screenshot shows the Excel interface with the 'Remove Duplicates' dialog box open. The dialog box has a title bar 'Remove Duplicates' and a close button. Below the title bar, it says 'To delete duplicate values, select one or more columns that contain duplicates.' There are two buttons: 'Select All' and 'Unselect All'. A checkbox labeled 'My data has headers' is checked. Below this is a list box titled 'Columns' with the following items: Agency, Name, Record\_ID (checked), Prog\_Seq, and Activity\_Type. At the bottom of the dialog box are 'OK' and 'Cancel' buttons.

- ✓ Merge the two spreadsheets together by copying one and pasting it within the other
- ✓ Click on the triangle in the far left corner of the spreadsheet so the entire sheet is highlighted 
- ✓ Select the "Data" tab within the top panel of the Excel document 
- ✓ Click on "Remove Duplicates" 
- ✓ Select delete duplicate values within the "Record\_ID" column to delete 

The unique value is the count you use

# Reports on Specific Funding Streams (Q2)

	Grant Start Date through 1 <sup>st</sup> Quarter	Grant Start Date through 2 <sup>nd</sup> Quarter
(857) Individual Plan Development	0	126
(857) Staff Assisted Assessments	1	18
(857) Staff Assisted Job Search	1	108
(857) Career Counseling	1	126
(857) Work Experience	0	0
(857) Pre-Vocational Services	0	0
(857) Work Readiness Services	0	0
(838) Non-Credentialed Training	2	4
(838) Classroom Training	12	28
(838) Customized Training	0	0
(838) CLIMB Training or Consulting	0	13
(838) Incumbent Worker Training	0	0
(838) OJT Public or Private	0	0
(838) Apprenticeships	0	0

**07/01/2018 – 12/31/2018**  
**Has been entered accurately**

**Repeat this process for the remaining quarters**

# Reports on Specific Funding Streams Grant Closeout

No activities open means all cases have "Exited" that funding stream

Activity	Currently Open	Currently Closed	Successful Complet
Career Counseling	0	1	
Indv Plan Dvpmt	0	1	
Staff Assist Assess	0	1	
Staff Assist JS In	0	1	
Individual Career - Total	0	4	
Employ, Pend Exit	0	3	
None - Total	0	3	
Classroom Trng	0	2	
Training, Cred - Total	0	2	
Non-Cred Trng	0	1	
Training, Non-Cred - Total	0	1	

When a funding stream is no longer available there must not be activities open in WF1 showing that grant as its funding source

**The "Currently Open" column of the Activity Summary must show all "0"**

**If no activities are open, all cases have "Exited" that funding source**

# Why numerators and denominators might be different than expected

## Participants who only access State funds

If all activities on the participant's case are associated with State Dislocated Worker funding

That participant will not be included in WIOA Dislocated Worker measures

***At least one activity on the case needs to be supported by WIOA Dislocated Worker funding***

# Why numerators and denominators might be different than expected (Continued)

## Participant who only access WIOA funds

If all activities on the participant's case are associated with WIOA Dislocated Worker funding

That participant will not be included in State Dislocated Worker measures

***At least one activity on the case needs to be supported by State Dislocated Worker funding***

# Why numerators and denominators might be different than expected (Continued)

## Participant who access both WIOA and State funds

If there are activities on the participant's case associated with both WIOA Dislocated Worker and State Dislocated Worker funding

*That participant will be reported in both State and WIOA performance measures*

# WIOA Performance Indicators

Performance Measure	Numerator	Denominator is	Activity in WF1 that triggers performance
2nd Quarter Employment	Has at least \$1 in Wage Detail in the 2nd quarter after Exiting or has Supplemental Wage Information entered into the Follow-up tab of WF1 for the 2 <sup>nd</sup> quarter after exiting	All Exiters during reporting period except those exited with exclusion	Any WF1 Activities
4th Quarter Employment	Has at least \$1 in Wage Detail in the 4th quarter after Exiting or has Supplemental Wage Information entered into the Follow-up tab of WF1 for the 4 <sup>th</sup> quarter after exiting	All Exiters during reporting period except those exited with exclusion	Any WF1 Activities

# WIOA Performance Indicators (Continued)

Performance Measure	Calculation	Included	Activity in WF1 that triggers performance
Median Earnings	See Below	Total quarter wages for each participant showing wages in the 2nd quarter after exiting except for those exited with exclusion	Any WF1 Activities

Odd numbered list

Workforce One ID	2nd Quarter Wages
100001863	\$20.00
100000250	\$500.00
100001875	\$600.00
100002341	\$1,000.00
100002481	\$1,500.00
100002486	\$3,300.00
100002509	\$4,000.00
100002521	\$4,200.00
100002506	\$6,000.00
100002485	\$8,000.00
100002519	\$8,700.00

Even numbered list

Workforce One ID	2nd Quarter Wages
100001863	\$20.00
100000250	\$500.00
100001875	\$600.00
100002341	\$1,000.00
100002481	\$1,500.00
100002486	\$3,300.00
100002509	\$4,000.00
100002521	\$4,200.00
100002506	\$6,000.00
100002485	\$8,000.00
100002519	\$8,700.00
100002519	\$8,700.00

$3300 + 4000 = 7300 / 2$   
Median is \$3,650

# WIOA Performance Indicators (Continued)

Performance Measure	Numerator	Denominator	Activity in WF1 that triggers performance
<p><b>Credential Attainment (Post-Secondary)</b></p>	<p>Credential was captured in WF1, Attainment date was during enrollment or within 1-year of exit, AND the type of credential attained is recognized</p>	<p>Date of exit is within reporting period AND was enrolled in "Post-Secondary" except those exited with exclusion</p>	<p>Apprenticeship, Classroom Training, Credential Attained without Training, Entrepreneurial Training, and GED training if the GED student exits to employment, Occupational Skills Training, Prerequisite Training, Remedial Training, TAA Apprenticeship</p>

# Baseline Indicator for Program Years 2016 - 2019

Performance Measure	Numerator	Denominator	Activity in WF1 that triggers performance
Measurable Skills Gain	Documented increase of functioning level, transcript, report card, milestone, or skills progression during reporting period	All participants enrolled in training leading to a recognized postsecondary credential or employment except those exited with exclusion. It encompasses all WIOA training, OJT, Apprenticeship, and Customized Training	Apprenticeship, Classroom Training, Credential Attained without Training, Customized Training, Entrepreneurial Training, GED Training, Incumbent Worker Training, Incumbent Worker Credential Waiver, Non-Credential Training, Occupational Skills Training, OJT, OJT - Public or Private, Prerequisite Training, Remedial Training, TAA Apprentice

# PY16, PY17, PY18, & PY19 WIOA Cohorts

	Reporting Year	➔	Program Year 2016 (7/1/16 - 6/30/17 Annual Report)				Program Year 2017 (7/1/17 - 6/30/18 Annual Report)				Program Year 2018 (7/1/18 - 6/30/19 Annual Report)				Program Year 2019 (7/1/19 - 6/30/20 Annual Report)			
Dislocated Worker and WIOA Adult Performance Cohorts	Reporting Quarter	➔	Q1 Jul-Sep 2016	Q2 Oct-Dec 2016	Q3 Jan-Mar 2017	Q4 Apr-Jun 2017	Q1 Jul-Sep 2017	Q2 Oct-Dec 2017	Q3 Jan-Mar 2018	Q4 Apr-Jun 2018	Q1 Jul-Sep 2018	Q2 Oct-Dec 2018	Q3 Jan-Mar 2019	Q4 Apr-Jun 2019	Q1 Jul-Sep 2019	Q2 Oct-Dec 2019	Q3 Jan-Mar 2020	Q4 Apr-Jun 2020
2nd Quarter Employment	Exiting Quarter	➔																
2nd Quarter Median Earnings	Exiting Quarter	➔																
4th Quarter Employment	Exiting Quarter	➔																
Credential Rate	Exiting Quarter	➔																
Measurable Skill Gains	Current Quarter	➔																

See next couple of slides for directions on how to use this chart

# Using the Cohort Chart

## Finding Program Year (PY) Timeframes

The top colored section lists four program years in separate colors and the date range included in each of those program years.

PY16: red, PY17: yellow, PY18: blue, and PY19: green

***Example:** If you want to know what months are included in PY18, look at the top section in blue. This section tells you PY18 runs July 2018 - June 2019.*

## Finding Quarter (Qtr) Report Timeframes

The second colored sections separates each program year into that program year's quarter report date ranges.

Quarter 1: Jul-Sep, Q2: Oct-Dec, Q3: Jan-Mar, and Q4: Apr-Jun

***Example:** If you want to know what months are included in PY18 Quarter 1, look at the second colored section under the PY18 label (in blue) then find the first Quarter listed (on the left). This tells you PY18 Q1 runs July 2018 - June 2019.*

# Using the Cohort Chart (Continued)

## 5 Performance Indicators Measured in every Quarter and Annual report

The far left section in the chart lists these five Indicators

1. 2nd Quarter Employment: based on the participants' exit date and employer reported state and national wages in the 2<sup>nd</sup> quarter after exiting
2. 2nd Quarter Median Earnings: based on the participants' exit date and the median wage reported by employers (state and national wages) in the 2<sup>nd</sup> quarter after exiting
3. 4th Quarter Employment: based on the participants' exit date and employers reporting state and national wages earned in the 4<sup>th</sup> quarter after exiting

# Using the Cohort Chart (Continued)

## 5 Performance Indicators Measured

4. Credential Rate: based on all participants who attended training during enrollment and the date the participants exited (4th quarter after the exiting quarter)
5. Measurable Skill Gains (MSG): Only real time measure. Based on all participants who attended training that leads to a credential or employment at any time during their enrollment period and if they have a captured MSG during the reporting period

# Using the Cohort Chart (Continued)

To find the date range for exiters included in each Annual Report for all exit based performance indicators

1. Follow the PY's color in which you want participant exit date ranges on down through the individual indicator section
2. Once you are in the indicator line you want the information on, look directly up to the quarter date section above it
3. The quarter date ranges listed above that program year's color are the exit date ranges that indicator uses

***Examples:*** PY18's 2nd Qtr Employment performance outcome includes participants exited July 2017 - June 2018. PY18's 4th Qtr Employment performance outcome includes participants exited January 2017 - December 2017.

# Using the Cohort Chart (Continued)

To find the date range for exiters included in each Quarter Report for all exit based performance indicators

1. Follow the PY's color for the quarter in which you want date ranges on down to the individual indicator section
2. Once you are in the indicator line, look directly up from the PY colored quarter section you want to know to the dated quarter section above it
3. The quarter date range listed is the exit date range used for that indicator in that program year's quarter

***Examples:*** PY18's 2nd Qtr Employment performance outcome includes participants exited July 2017 - June 2018. PY18's 4th Qtr Employment performance outcome includes participants exited January 2017 - December 2017.

# Using the Cohort Chart (Continued)

**Reminder:** The Measurable Skill Gains Performance Indicator is a Real-Time Measure

1. It includes all participants who attended training
2. It measures all those participants who have a skill gain and those that do not
3. The timeframe used in this indicator is the same timeframe for each Program Year the indicator is measuring

**Examples:** *PY18's Measurable Skill Gains date range includes participants who attended training and are enrolled July 2018 - June 2019. PY18's Q1 Measurable Skill Gains date range includes participants who attended training and are enrolled July 2018 - Sept 2018.*

# Performance Questions?



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