

DEPARTMENT OF CHILDREN AND FAMILIES  
DIVISION OF FAMILY AND ECONOMIC SECURITY  
ADMINISTRATOR'S MEMO SERIES

ACTION  
 NOTICE

**DFES 18-01**

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\*PROGRAM CATEGORIES:

AS  FM  ML  TR  
 CC  FL  NA  W-2  
 CS  IT  RA  WIA  
 CF  JC  TC  
 CR  LM  TA

**TO:** W-2 Agency Directors

**FROM:** Janice Peters  
Deputy Division Administrator

**RE:** Required Training for Wisconsin Works and Related Programs Workers

**PURPOSE:**

The purpose of this memo is to:

1. Remind W-2 Contractors of their responsibility to ensure that all W-2 workers are trained in accordance with [Administrative Rule Chapter DCF 103 W-2 Worker Training](#).
2. Outline additional training requirements as required by the Bureau of Working Families (BWF).

Remind W-2 Contractors of their responsibility to submit an annual report that documents the W-2 -related training activity of each of its workers.

**BACKGROUND:**

[Chapter DCF 103 W-2 Worker Training](#) outlines the training requirements for W-2 workers and supervisors.

The rule specifies that W-2 Contractors that subcontract out a portion of their obligations under the W-2 and Related Programs Contract are responsible for ensuring that the subcontractors also comply with the rule.

For reference purposes, below are definitions taken from the rule of W-2 workers and supervisors:

**FEP:** a case manager employed by a Wisconsin Works agency directly or by subcontract who determines eligibility, assists in the process of determining eligibility, or performs case management functions. "FEP" includes a case manager who specializes in employment

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attachment and retention, assists W-2 participants with special needs, or assists W-2 participants with the Supplemental Security Income (SSI) and Social Security Disability Income (SSDI) application process.

**RS:** a worker employed by a Wisconsin Works agency who performs application entry, provides an initial assessment of a potential W-2 applicant's needs, makes referrals to service providers, or evaluates an individual's need for W-2. "Resource Specialist" may also include a worker employed by an agency contracted with the department to provide access services.

**Supervisor:** a worker employed by a Wisconsin Works agency directly or by subcontract who supervises W-2 Financial and Employment Planners or Resource Specialists.

**SUMMARY OF TRAINING REQUIREMENTS:**

The following is an outline of requirements for both new and experienced W-2 workers and Supervisors:

Requirement	New Workers	New Supervisors	Experienced Workers	Experienced Supervisors
New Worker Training Program appropriate to the specific W-2 job functions they will perform	✓			
New Worker Training Program appropriate to the W-2 job functions of the staff they will supervise		✓		
Case Management courses: 1. W-2 Case Management: Assessment, Employability Plans, and Activity Assignment (FEP) 2. Practical Applications in CWW (FEP) 3. Strategies for Prioritizing W-2 Case Management Tasks (FEP) 4. W-2 Case Management: Attaining the Work Participation Rate (FEP)	✓	✓		
Domestic Abuse (12 hours for FEPs and W-2 Case Managers; 6 hours for RSs)	✓	✓		
Enhanced Case Management Training (ECM) (12 hours each year) <i>(see additional detail below)</i>			✓	✓
Professional development (12 hours each year) <i>(see additional detail below)</i>			✓	✓
Introduction to the Americans with				

Disabilities Act for W-2	✓	✓	✓	✓
Introduction to Civil Rights	✓	✓	✓	✓
Program Security and Confidentiality	✓	✓	✓	✓
New W-2 policy and refresher training	✓	✓	✓	✓

FEPs cannot make independent decisions related to eligibility or perform case management functions until the initial W-2 training is successfully completed. Similarly, RSs cannot make independent decisions related to providing an initial assessment of a potential W-2 applicant's needs, making referrals to service providers, or evaluating an individual's need for W-2 until the initial W-2 training is successfully completed.

**Enhanced Case Management (ECM) Training**

Twelve hours of ECM activities is an annual requirement of all experienced W-2 workers and supervisors within W-2. ECM programs give supervisors and workers the tools to provide quality services to all participants, including participants with special needs.

ECM activities provide an opportunity to examine the employability plan, promote early attachment to the workforce, provide career advising, and design effective post employment strategies. The Division of Family and Economic Security Partner Training Team (PTT) also promotes a strength-based approach to case management. ECM courses provide training in strategies necessary to assist participants in building on individual strengths.

The PTT offers these topics as classroom programs or through alternate methods. Classroom programs are offered on a regional basis or upon request.

ECM topics are identified as such in the course descriptions.

**Professional Development Requirement**

A minimum of twelve hours of professional development is an annual requirement of all experienced W-2 workers and supervisors.

Professional development includes, but is not limited to, PTT programs, conferences, technical college courses, seminars, workshops, and/or policy and procedure refresher training. The local agency selects the professional development training and it does not need to be conducted or sponsored by the Department.

**Training Equivalencies and Waivers**

BWF recognizes that local W-2 Contractors routinely provide their workers with ongoing professional development. To recognize local expertise, PTT awards ECM equivalency and waivers to local agency training efforts.

In order to award a W-2 Contractor with an ECM equivalency for agency training efforts that meet ECM intent, agencies must provide PTT with the title of the learning experience, a brief

program description, the presenter's name, the number of hours in training, the learning objectives, and the date of the activity.

PTT will waive ECM requirements to local workers engaged in educational programs that provide expertise in case management processes. In order to get a waiver, agencies must provide PTT with the worker's name, a program description, and the number of hours the agency would like waived.

To request an ECM equivalency or a waiver, W-2 Contractors must email the request with the supporting documentation to: Beki Lockery ([blockery@dwfs.us](mailto:blockery@dwfs.us)).

## **W-2 Agency Training Liaisons (ATL)**

Each W-2 Contractor must designate an Agency Training Liaison (ATL) as a part of the agency management team. The ATL acts as the point of contact with the Division's training team and is responsible for the training needs of agency workers, coordinating the logistics for delivery of the Bureau's training programs, and participating in the development and evaluation of the Bureau's training programs. ATLs assist PTT in assessing the training needs of their staff and may participate in the development and delivery of training products.

W-2 Contractors are responsible for the general development of their employees and for training not offered by PTT. It is the W-2 Contractor's responsibility to ensure that workers have the skills needed to perform job functions.

## **Training Reports and Records**

According to rule, each W-2 Contractor must submit an annual report that documents training completed by all W-2 workers and supervisors during the previous calendar year. The report includes information on training received by individuals employed directly by the W-2 Contractor and individuals employed by the W-2 Contractor's subcontractors.

BWF has developed a database to assist Contractors in capturing training completion and to ease submission of the annual training report, including training that has been taken as a result of an approved training equivalency or waiver for ECM requirements. Contractors must have all training information entered into the database and uploaded by the second Friday in January of each calendar year for the prior calendar year.

The W-2 Training Database is a Microsoft Access application. The database is in a DCF SharePoint site at

[https://share.dcf.wisconsin.gov/cake/Wisconsin\\_Works\\_Training\\_Report/default.aspx](https://share.dcf.wisconsin.gov/cake/Wisconsin_Works_Training_Report/default.aspx)

BWF has developed a W-2 Training Database User Guide with instructions on how to get access, how to download the database, how to enter data into the database, and how to upload the file. You can access the W-2 Training Database User Guide on the SharePoint site using the above link. If you have any questions related to using this database, contact Joe Fornes at 608-422-6303 or [joseph2.fornes@wisconsin.gov](mailto:joseph2.fornes@wisconsin.gov).

BWF will continue to maintain training records for those who attend DCF sponsored training programs.

**ATTACHMENT:** [Administrative Rule Chapter DCF 103 W-2 Worker Training](#)

**CONTACT:**

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