



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

DFES 21-01

ISSUE DATE: 1/19/2021
DISPOSAL DATE: 12/31/2021

ACTION
 NOTICE

PROGRAM CATEGORIES:

- W-2 - Wisconsin Works
- RA - Refugee Assistance
- CS - Child Support
- CF - Children First
- TJ - Transitional Jobs
- TMJ - Transform Milwaukee Jobs

TO: W-2 Agency Directors

FROM: Connie M. Chesnik
Division Administrator

RE: Required Training for Wisconsin Works (W-2) and Related Programs Workers

PURPOSE

The purpose of this memo is to communicate the 2021 training requirements for W-2 workers regarding compliance with Administrative Rule Chapter DCF 103 and the required documentation for training completed by all W-2 Financial and Employment Planners (FEPS), Resource Specialists, and their supervisors during the previous calendar year.

BACKGROUND

[Chapter DCF 103 W-2 Worker Training](#) outlines the training requirements for W-2 workers and supervisors. [Administrator's Memo 20-02](#), issued on January 21, 2020, outlines the W-2 agencies' training responsibilities for contract year 2020.

On March 12, 2020, Governor Tony Evers issued Executive Order 72 declaring a health emergency due to Coronavirus Disease 2019 (COVID-19) and directing all state agencies to assist in the state's response to the public health emergency. In response to the health emergency and ongoing safety concerns due to Covid-19, DFES cancelled all in-person trainings for the remainder of calendar year 2020 and adjusted training requirements for W-2 workers ([DFES Administrator's Memo 20-04](#)).

DEFINITIONS

For reference purposes, below are definitions taken from Chapter DCF 103 of W-2 workers and supervisors:

Financial and Employment Planner (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 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 Insurance (SSDI) application process.

Resource Specialist (RS): A worker employed by a Wisconsin Works agency or by subcontract 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.

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 2021 TRAINING REQUIREMENTS

As health and safety concerns due to COVID-19 continue into 2021, DFES will not offer in-person training through at least June 30, 2021. This may continue beyond that date, depending on the health situation.

Due to this restriction on in-person training, DFES will continue the adjusted training requirements for W-2 workers established in 2020 for 2021.

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

| 2021 Requirement | New Worker | New Supervisor | Experienced Worker | Experienced Supervisor |
|---|------------|----------------|--------------------|------------------------|
| New Worker Training (NWT) Program appropriate to the specific W-2 job functions they will perform <i>(required during first 6 months of employment)</i> | ✓ | | | |
| NWT Program appropriate to the W-2 job functions of the staff they will supervise <i>(required during first 6 months of employment)</i> | | ✓ | | |

| 2021 Requirement | New Worker | New Supervisor | Experienced Worker | Experienced Supervisor |
|---|------------|----------------|--------------------|------------------------|
| <p>Case Management courses:</p> <ol style="list-style-type: none"> 1. W-2 Case Management: Assessment, Employability Plans, and Activity Assignment (FEP) 2. Practical Applications in CWW (FEP) W-2 Case Management and You (FEP) <p><i>(The deadline for completing these courses is suspended until further notice. Once in-person training resumes, or equivalent courses are available online, completion will be required for any worker who has finished NWT.)</i></p> | ✓ | ✓ | | |
| <p>W-2 Case Management: Attaining the Work Participation Rate (FEP)</p> <p><i>(This is an online, independent learning course and must be completed within one year of completing NWT.)</i></p> | ✓ | | | |
| <p>Domestic Abuse (12 hours for FEPs and 6 hours for RSs)</p> <p><i>(The deadline for completing a related, appropriate course is suspended until further notice. Once in-person training resumes, or equivalent courses are available online, completion will be required for any worker who has finished NWT.)</i></p> | ✓ | ✓ | | |
| Enhanced Case Management Training (ECM) (6 hours each) | | | ✓ | ✓ |

| 2021 Requirement | New Worker | New Supervisor | Experienced Worker | Experienced Supervisor |
|--|------------|----------------|--------------------|------------------------|
| year) (see additional detail below chart) | | | | |
| Professional development (6 hours each year) (see additional detail below chart) | | | ✓ | ✓ |
| Deepening the Connection: DVR and W-2* (required within six months of hire) | ✓ | ✓ | | |
| W-2 worker attendance at DVR regional meeting* (The deadline for the W-2 and DVR collaboration meeting is suspended until further notice.) | | | ✓ | ✓ |
| New W-2 policy, process, and refresher training* | ✓ | ✓ | ✓ | ✓ |
| Introduction to the Americans with Disabilities Act for W-2 (required upon hire) | ✓ | ✓ | ✓ | ✓ |
| Introduction to Civil Rights (required upon hire and every three years thereafter) | ✓ | ✓ | ✓ | ✓ |
| Program Security and Confidentiality (required upon hire and annually thereafter) | ✓ | ✓ | ✓ | ✓ |
| W-2 WWP Processes: Phase 2 <i>(This training is required for experienced workers and workers who complete NWT through April of 2021.)</i> | | | ✓ | ✓ |

*Count toward the 6-hour professional development training requirement

Enhanced Case Management (ECM) Training

A minimum of six (6) hours of ECM activities is required for CY2021 for all experienced W-2 workers and supervisors.

ECM activities provide an opportunity to examine employability planning, promote early attachment to the workforce, provide career advising, and design effective post-employment strategies. The 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.

Note that it is also permissible for W-2 workers to attend webinars, conferences, training sessions, etc., offered remotely by advocacy agencies, research organizations, etc. (e.g., The National Network to End Domestic Violence) in order to meet ECM requirements. See information on Training Equivalencies later in this Memo.

PTT ECM topics are identified as such in the course descriptions in the Learning Center catalogue.

Professional Development Requirement

A minimum of six (6) hours of professional development activities is required for CY2021 for all 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.

“Deepening the Connection: DVR and W-2” online training: This training counts toward professional development training hours. The partnership between the W-2 program and DVR gives individuals with disabilities access to a greater range of supports, services, and information that will expedite the achievement of their employment goals. New FEPs are required to complete the *“Deepening the Connection: DVR and W-2”* online training within six months of hire. All FEPs are required to participate in a W-2/DVR collaboration training at least once per calendar year. Subsequent training is to be accomplished by W-2 staff attending a regional meeting with DVR staff to discuss local collaboration and ways to work together more effectively. In keeping with the need to maintain social distance, for (minimally) the first 6 months of CY2021, the requirement that all W-2 staff attend a regional meeting with DVR staff for CY2021 is waived.

TRAINING EQUIVALENCIES AND WAIVERS

Bureau of Working Families (BWF) recognizes that local W-2 Agencies 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 Agency with an ECM equivalency for comparable 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.

Local workers engaged in educational programs that provide expertise in case management processes can request a waiver for ECM requirements. 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 Agencies must email the request with the supporting documentation to: Sally Hilsgen (sally.hilsgen@wisconsin.gov).

W-2 AGENCY TRAINING LIAISONS (ATL)

Each W-2 Agency must designate an 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 BWF's training programs, and participating in the development and evaluation of BWF'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 Agencies are responsible for the general development of their employees and for training not offered by PTT. It is the W-2 Agency's responsibility to ensure that workers have the skills needed to perform job functions.

TRAINING REPORTS

Quarterly Reporting

W-2 agencies are required to submit a quarterly version of the annual report that documents training completed by all W-2 FEPS, Resource Specialists, and their supervisors during the calendar year.

Agencies must use the BWF spreadsheet to capture quarterly training completion, including training that has been taken as a result of an approved training equivalency or waiver. This report must include information on training received by individuals employed directly by the W-2 Agency and individuals employed by the W-2 Agency's subcontractors.

W-2 Agencies must send their completed quarterly training spreadsheet to their Regional Coordinator/Administrator by the second Friday of the month following each quarter.

The purpose of quarterly reporting is to assist agencies in meeting annual training requirements. With quarterly reporting, agencies will be able to assess their progress toward meeting annual training requirements and the regional staff and PTT will be able to assist agencies as well in meeting the requirements.

Annual Reporting

W-2 Agencies must send their completed annual training spreadsheet to David Turk, PTT Training Coordinator/Liaison (david.turk@wisconsin.gov) by the second Friday in January of each calendar year for the prior calendar year.

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

W-2 AGENCY RESPONSIBILITY

Each W-2 Agency shall ensure that all W-2 workers are trained in a timely manner on all W-2 policy and procedure and automated system updates that are issued by the department. [DCF Administrative Rule 103.06]

New Worker Training (NWT): FEPs cannot make independent decisions related to eligibility or perform case management functions until the NWT 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 NWT is successfully completed. [DCF 103.03(1) (b) & (c)]

Failure to meet NWT training requirements as well as all other training requirements outlined in this memo and in the W-2 and Related Programs Contract, Appendix C, Scope of Work, Section III. E. may result in a penalty. Penalties are outlined in Appendix E, Terms and Conditions Relating to Payments, Section E. of the contract. However, with increased reporting and technical assistance from regional staff and with the adjustments that we have made with regard to COVID-19, the expectation is that all agencies will meet the annual training requirements.

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