



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

DFES 23-03

ISSUE DATE: 02/24/2023

DISPOSAL DATE: 12/31/2023

- 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 2023 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 22-03 issued on January 12, 2022, outlined the W-2 agencies' training responsibilities for contract year 2022.

Since 2020, COVID-19 precautions and protocols have been impacting W-2 training. DFES modified several training requirements in 2020 and 2021 in light of these impacts. While COVID-19 continues to impact Wisconsin, DFES has developed increased capacity to deliver training in ways compatible with COVID-19 precautions. Several training requirement adjustments put into place in 2020 and 2021 ended in 2022.

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 2023 TRAINING REQUIREMENTS

The DFES Partner Training Team (PTT) offers required training sessions via in-person and online formats. New Workers who completed their initial New Worker training in 2020 or 2021 must complete the remaining required courses on or before December 31, 2023.

Workers who completed initial New Worker training after January 1, 2023, must complete the remaining required courses within twelve (12) months of their date of hire (as per Chapter DCF 203).

Additionally, a minimum of twelve (12) hours of Enhanced Case Management (ECM) activities and twelve (12) hours of Professional Development (PD) activities is required for CY2023 for all experienced W-2 workers and supervisors.

Other courses (e.g., Program Security and Confidentiality, Introduction to Civil Rights) must be completed periodically by experienced W-2 workers and supervisors. See details for specific courses and requirements in the chart below.

DFES highly recommends agencies prioritize individuals to meet training requirements with the goal of moving all agency staff whose training is overdue through required trainings no later than December 31, 2023.

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

2023 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>		✓		
Case Management courses: 1. W-2 Case Management: Assessment, and Employability Plans (FEP)/Building the BEST Connections in Case Management (**See note below chart) 2. Practical Applications in CWW (FEP) 3. W-2 Case Management and You (FEP) <i>(Required Case Management Courses must be completed within 12 months of date of hire.)</i>	✓	✓		
W-2 Case Management: Attaining the Work Participation Rate (FEP) <i>(This is an online, independent learning course and must be completed within one year of completing NWT.)</i>	✓			

2023 Requirement	New Worker	New Supervisor	Experienced Worker	Experienced Supervisor
Domestic Abuse (12 hours for FEPs and 6 hours for RSs) <i>(The Domestic Abuse training must be completed within 12 months of hire.)</i>	✓	✓		
Enhanced Case Management Training (ECM) (12 hours each year) <i>(see additional detail below chart)</i>			✓	✓
Professional development (12 hours each year) <i>(see additional detail below chart)</i>			✓	✓
Deepening the Connection: DVR and W-2* <i>(required within six months of hire)</i>	✓	✓		
W-2 worker attendance at DVR regional meeting* <i>(See details below.)</i>			✓	✓
New W-2 policy, process, and refresher training*	✓	✓	✓	✓
Introduction to the Americans with Disabilities Act for W-2 <i>(required upon hire)</i>	✓	✓	✓	✓
Introduction to Civil Rights <i>(required upon hire and every three years thereafter)</i>	✓	✓	✓	✓
Program Security and Confidentiality <i>(required upon hire and annually thereafter)</i>	✓	✓	✓	✓

* Counts toward the 12-hour professional development training requirement

** W-2 Case Management: Assessment and Employability Plans will be replaced by Building the BEST Connections in Case Management in 2023. Completion of either course will satisfy this requirement.

Reminder For Workers who completed Initial W-2 New Worker Training in 2020 or 2021

Workers who completed Initial W-2 New Worker Training online in 2020 and 2021 who have not yet been able to complete the courses listed above must complete the required courses no later than December 31, 2023.

The Partner Training Team and Regional monitoring staff will assist Agency Training Liaisons in tracking these individuals through the Quarterly Training Report (see information on this report below).

Enhanced Case Management (ECM) Training

A minimum of twelve (12) hours of ECM activities is required for CY2023 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 twelve (12) hours of professional development activities is required for CY2023 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.

TRAINING EQUIVALENCIES AND WAIVERS

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 Hilszen (sally.hilszen@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 the expectation is that all agencies will meet the annual training requirements.

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