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State of Wisconsin
Governor Tony Evers



TO: **W-2 Agencies
Training Staff**

FROM: Margaret McMahon, Director
Bureau of Working Families
Division of Family and Economic Security
Department of Children and Families

BWF OPERATIONS MEMO

No: 19-12
DATE: 06/26/2019

W-2 EA CF JAL
RAP TMJ TJ Other EP

SUBJECT: ***Wisconsin Works and Division of Vocational Rehabilitation
Collaboration Resources and Training***

CROSS REFERENCE: W-2 Manual sections [7.4.2.1](#) and [Appendix – Activity Codes
Operations Memo 10-01](#) (obsolete)

EFFECTIVE DATE: Immediately

PURPOSE

The purpose of this memo is to inform Wisconsin Works (W-2) agencies about updated resources to facilitate collaboration between W-2 and the Division of Vocational Rehabilitation (DVR) to serve individuals with disabilities who may benefit from the services of both programs.

BACKGROUND

In 2008, the Departments of Children and Families (DCF) and Workforce Development (DWD) formalized a long-standing partnership with a Memorandum of Understanding (MOU) that outlined general principles guiding the partnership between DCF and DWD for W-2 and DVR employment services for individuals with disabilities.

In 2009, a workgroup comprised of state and local W-2 and DVR staff convened to develop a Technical Assistance Guide (TAG) to expand those general principles into a framework for improved communication, coordination, and provision of services across the two programs.

As W-2 caseloads trend toward a greater percent of participants with significant barriers to employment, this partnership has become even more important. Accordingly, the MOU and TAG were updated in 2018, again with input from state and local agency staff.

See attached 2018 [MOU](#) and [TAG](#)

W-2/DVR COLLABORATION

Federal and state laws require that the W-2 and DVR programs develop employment plans with all program participants. W-2 uses an Employability Plan (EP) and DVR uses an Individualized Plan for Employment (IPE). For W-2 participants co-enrolled in DVR, coordinated plans should be developed to:

- Give individuals access to a greater range of supports, services, and information;
- Ensure that the EP and IPE align as much as possible;
- Count certain services and supports provided under the IPE toward the W-2 EP requirements;
- Eliminate repetition of similar activities and reduce the individual's overall workload; and
- Expedite the achievement of an individual's employment goals.

Individuals do not need to be co-enrolled to receive services. DVR can help the W-2 agency:

- Identify disability-related resources available within a W-2 participant's community such as qualified assessment agencies, treatment providers, disability advocates, and other organizations whose mission includes serving individuals with disabilities.
- Provide technical assistance to the W-2 Financial and Employment Planner (FEP) in applying recommendations from a disability or vocational assessment in the development of the EP.
- Discuss how participation in DVR would be beneficial or what impact receiving DVR services would have on other benefits, e.g. SSI/SSDI benefits, and how the two programs could coordinate to help the individual achieve their employment goal(s).

POLICY UPDATES

W-2 policy updates are summarized below. Relevant policy manual sections are attached to this memo and will be incorporated into the W-2 Manual upon implementation. Policy that was removed is struck through and policy that was added is underlined.

CURRENT POLICY

The W-2 Transition (W-2 T) employment position is for individuals determined not ready for unsubsidized employment or another W-2 employment position due to their own incapacitation or need to remain in the home to care for a family member who is incapacitated or disabled.

W-2 Manual section [7.4.2.1](#) states that individuals placed in W-2 T must have a formal assessment based on an independent assessment by a medical professional, DVR, or similar qualified assessing agency.

POLICY CLARIFICATION

DVR can refer W-2 participants co-enrolled in DVR for vocational assessment, but DVR is not an assessment provider. W-2 Manual section 7.4.2.1 is amended to remove the reference to DVR as a qualified assessing agency.

[See attached updated W-2 Manual section 7.4.2.1](#)

CURRENT POLICY

W-2 Manual [Appendix - Activity Codes](#) states that activity code AD (Disability and Learning Assessment) should be assigned when participants are involved in a formal assessment by DVR or other qualified assessing agency.

POLICY CLARIFICATION

DVR can refer W-2 participants co-enrolled in DVR for vocational assessment, but DVR is not an assessment provider. Activity Code AD is amended to remove the reference to DVR as a qualified assessing agency.

[See attached updated W-2 Manual section Appendix – Activity Codes](#)

TRAINING

W-2 agencies are expected to collaborate with DVR. To facilitate coordination between the programs, policy and training staff from DVR, W-2, and the Partner Training Team (PTT) worked together to develop a webcast titled, *Deepening the Connection: DVR and W-2*. It covers the basics of DVR and W-2 programs and provides ways to collaborate effectively.

The webcast is posted on the [PTT Learning Center](#).

AGENCY ACTION

TRAINING REQUIREMENTS

All FEPs are required to complete the training by December 31, 2019. New FEPs are required to complete the training within six months of hire. All FEPs are required to participate in a W-2/DVR collaboration training at least once a year.

Training will be tracked and counted toward annual Professional Development hours. W-2 Agency Training Liaisons (ATLs) must maintain records of W-2 agency staff who have participated in and completed annual training, along with the location of the training and the roster of participants for that session. Attendance must be tracked on the training spreadsheet submitted to PTT in accordance with current process required by PTT.

INITIAL TRAINING

Initial training is to be accomplished by a joint meeting of W-2 and DVR staff, who will view the webcast together and discuss ways to improve collaboration.

There are ten [W-2 Regions](#) and eleven [DVR Districts](#). DVR holds a district-wide meeting each month. The W-2/DVR collaboration webcast and discussion will be on the agenda at one DVR meeting per district in 2019. The W-2 ATLs must contact the appropriate DVR District Director to find out the date of the district-wide meetings. (See [DVR staff directory](#).) W-2 agencies may participate in a DVR-sponsored training or set up their own training session and invite local DVR staff.

SUBSEQUENT TRAINING

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. DCF expects these trainings to result in a closer relationship between W-2 and DVR staff, more referrals by W-2 agencies to DVR, and improved outcomes for W-2 participants with disabilities.

ATTACHMENTS

[2018 W-2/DVR Memorandum of Understanding](#)
[2018 W-2/DVR Technical Assistance Guide](#)
[W-2 Manual section 7.4.2 General W-2 T Participant Characteristics](#)
[W-2 Manual Appendix – Activity Codes](#)

CONTACTS

For W-2 Policy Questions in the Balance of State: Bureau of Regional Operations, W-2 Regional Coordinators

For W-2 Policy Questions in Milwaukee: Milwaukee Operations Section Regional Administrators

For W-2 CARES and WWP Functionality Questions: W-2 Help Desk

DCF/DFES/BWF/DH