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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

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| BWF OPERATIONS MEMO | |
| No: | 19-18 |
| DATE: | 09/20/2019 |
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| W-2 | <input checked="" type="checkbox"/> EA <input type="checkbox"/> CF <input type="checkbox"/> JAL <input type="checkbox"/> |
| RAP | <input type="checkbox"/> TMJ <input type="checkbox"/> TJ <input type="checkbox"/> Other EP <input type="checkbox"/> |

SUBJECT: *Updates to Wisconsin Works (W-2) Educational Needs Assessment Policy*

CROSS REFERENCE: BWF Operations Memos [19-02](#) and [19-17](#)
[W-2 Manual Glossary](#)
[W-2 Manual, 5.1.1.2 Referral for Formal Assessment at Application](#)
[W-2 Manual, 5.1.2 Assessment as Part of Ongoing Case Management](#)
[W-2 Manual, 5.3.1 Educational Needs Assessment](#)
[W-2 Manual Appendix – Activity Codes](#)

EFFECTIVE DATE: Immediately

PURPOSE

The purpose of this Operations Memo is to clarify W-2 policy regarding educational needs assessment and announce corresponding updates to the W-2 Manual.

BACKGROUND

On February 23, 2019, the Bureau of Working Families (BWF) implemented Phase 1 of Wisconsin Work Programs (WWP), a web-based system that supports work programs case management, data collection and availability, and evaluation. Phase 1 implementation of WWP modernized a portion of the work program case management functions previously in CARES mainframe. The WWP Informal Assessment Driver Flow supports an enhanced informal assessment process and more detailed documentation to inform case management decision-making and service planning.

In addition, several new system tools were released as part of Phase 1 to help workers better manage data collection. Workers now utilize a Test Scores Application that allows them to record and view scores for common standardized educational needs assessment tools.

BWF also implemented policy changes to support the enhanced informal assessment process. During the implementation of WWP Phase 1, it was also determined that updates to the Educational Needs Assessment policy were necessary to clarify requirements at application, ensure that individuals are referred for completion of a standardized educational needs assessment tool as appropriate, and further distinguish the educational needs assessment from career assessment.

This memo outlines policy changes to clarify requirements for completing the educational needs assessment. See [BWF Operations Memo 19-02](#) for information on updates to W-2 assessment policies and informal assessment enhancements. See [Operations Memo 19-17: Clarification of Career Assessment Requirements and Standards](#) for information on policies related to the requirement to complete a career assessment.

POLICY UPDATES

USE OF AN EDUCATIONAL NEEDS ASSESSMENT TOOL

Current Policy

Agencies are encouraged to use a standardized educational assessment tool to determine educational levels.

Updated Policy

Agencies should use a standardized educational assessment tool to determine educational levels and if the participant would benefit from education and training activities. For some applicants and participants, the self-reported information gathered through the WWP Informal Assessment Driver Flow may not accurately reflect current educational levels.

Completion of a standardized educational assessment tool is not necessary for an individual who has demonstrated their reading and math skills through attainment of postsecondary education. Postsecondary education includes completion of any education or coursework beyond high school such as a continuing education certificate, associate degree, baccalaureate degree, or graduate degree.

[See attached updated W-2 Manual Section 5.3.1](#)

REQUIRED TIMING FOR THE EDUCATIONAL NEEDS ASSESSMENT

Current Policy

The W-2 agency is required to conduct an educational needs assessment with all new W-2 applicants and before making a change in W-2 placement. If a standardized assessment tool, such as TABE or BEST has been completed within the prior six months, the agency may use the results of that assessment to determine the applicant or participant's current educational level.

Policy Clarification

There is no change to current policy requiring the W-2 agency to conduct an educational needs assessment with all new W-2 applicants and before making a change in W-2 placement, and the W-2 agency may continue to use results of standardized assessments completed within the last six months. The educational needs assessment policy has been updated to clarify policy for completing the educational needs assessment at application.

The Financial and Employment Planner (FEP) must never delay eligibility determination and placement because a completion of an educational needs assessment using a standardized educational needs assessment tool is pending. The FEP must use the best information available from the WWP Informal Assessment to complete the educational needs assessment at application and inform decision-making for initial placement and Employability Plan development. When completion of a standardized educational needs assessment tool is necessary to determine or confirm the individual's current educational levels, the tool must be scheduled and documented in CARES within 30 days of initial placement.

[See attached updated W-2 Manual Sections 5.1.1.2 and 5.3.1](#)

DEFINITIONS RELATED TO EDUCATIONAL NEEDS ASSESSMENT

Updated Manual Glossary Definition – Educational Needs Assessment

The definition of 'Educational Needs Assessment' has been updated to capture the purpose of the educational needs assessment as well as the three components of the educational needs assessment currently identified at W-2 Manual Section 5.3.1:

Educational needs assessments determine if the individual needs, or would benefit from, education or training activities, including a course of study for the granting of a declaration of equivalency of high school graduation. In making this determination, the FEP must consider the following:

- The information gathered on the applicant or participant's current educational levels;
- The level of education and training necessary to obtain full-time employment in the local labor market; and
- The applicant or participant's personal employment goals.

New W-2 Manual Glossary Definition – Educational Needs Assessment Tool

The term 'Educational Needs Assessment Tool' has been added to the W-2 Manual Glossary:

Educational needs assessment tools measure a participant's current educational levels. Standardized educational needs assessment tools, like the TABE or BEST, test skills and aptitudes in reading, language, math computation, and applied math in order to identify current literacy and numeracy skill levels.

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

CARES, CARES WORKER WEB (CWW), or WISCONSIN WORK PROGRAMS (WWP)

The WWP Informal Assessment Driver Flow includes an Education History page to facilitate basic information gathering about the individual's education levels. The Post-Secondary Education page follows and collects information about post-secondary education, licenses, and certifications that are completed or in-progress.

The Test Scores application is separate from the WWP Informal Assessment Driver Flow and accessed through the WWP Case Management menu. The Test Scores application allows workers to record test scores for the following standardized assessment tools:

- Basic English Skills Test (BEST)
- GED/HSED
- Test of Adult Basic Education (TABE)
- TABE Complete Language Assessment System- English (TABE CLAS-E)

Only GED/HSED scores can be entered from the "Education History" page, all other test scores must be entered into the "Test Scores app" directly.

There are no changes to CARES or CWW.

TRAINING

The Partner Training Team (PTT) will update any relevant trainings based on these policy changes and clarifications.

AGENCY ACTION

If using a standardized educational needs assessment tool other than the BEST, TABE, or TABE CLAS-E, W-2 agencies must provide written notice of the tool(s) they are using to their Regional Administrator (RA) or Regional Coordinator (RC) within 90 days of the release date of this memo. The RA or RC will use the requirements of W-2 Manual section 5.3.1 to review the tool(s). W-2 agencies are encouraged to reach out to their RA or RC with questions.

W-2 agencies must discuss the policy updates and clarifications with staff. W-2 agencies must also update any relevant local agency procedures.

ATTACHMENTS

[W-2 Manual Glossary](#)

[W-2 Manual, Chapter 5.1.1.2](#)

[W-2 Manual, Chapter 5.1.2](#)

[W-2 Manual, Chapter 5.3.1](#)

[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/LW