

5.1 Introduction

Under [W-2](#), assessment is the process of gathering the needed information to develop an Employability Plan customized for the participant that will result in either a successful employment outcome which starts the individual on a career path; or, if appropriate, a path to eligibility for [SSI](#) and/or [SSDI](#) benefits.

Certain types of assessments are required for all W-2 applicants and participants, including:

- Informal Assessment (see [5.2](#)); and
- Educational Needs Assessment (see [5.3](#)); and
- Career Assessment (see [5.4](#)).

The information gathered through these required processes will assist the FEP in identifying whether additional Formal Assessments are needed to develop the participant's [EP](#).

Under W-2, the assessment process is conducted in collaboration with the applicant or participant. The results of each assessment must be discussed with the participant and the participant must be given the opportunity to provide input on his or her W-2 placement and the activities that are assigned as part of the EP.

5.2.2 Informal Assessment Inventory

The [WWP](#) Informal Assessment Driver Flow covers the following assessment categories related to an individual's ability to become employed and remain employed:

- Languages
- Work History
- Participation in Other Work Programs
- Education History
- Post-Secondary Education
- Military Service
- Housing
- Transportation
- Legal Issues
- Participant Barriers
- Child and Youth Supports
- Family Barriers

The WWP Informal Assessment Driver Flow also includes a **Non-Custodial Parents** page that provides an opportunity for applicants and participants who are noncustodial parents (NCP) to discuss their role as a mother or father, and share basic information about the custodial parent and their child(ren). In addition, the **NCP Referral** page is intended to help the [W-2](#) worker determine if the agency could offer services to help the NCP of the applicant or participant's child(ren).

While moving through the WWP Informal Assessment Driver Flow, the W-2 worker must gather information about the applicant or participant's personal strengths, work styles, interests, and skills that may help the individual in their search for employment or that may be further developed through activities assigned in the [EP](#). The W-2 worker must work with the applicant or participant to identify resources that will address any unmet needs identified during the informal assessment process.

In addition to the information gathered through completion of the WWP Informal Assessment Driver Flow, the following inventory must be covered as part of the [informal assessment](#) process and reviewed with each [W-2](#) applicant or participant at application and as a part of ongoing case management.

- Personal strengths, interests and goals;
- Job skills (including transferable skills);
- Job readiness (including work preferences, history, applications, interviews, and contacts);
- Recent job search efforts;
- Results from [Career Assessment](#) that evaluate work styles, skills, and interests;
- Current neighborhood environment and schools;
- Household budgeting/money management strategies;
- Access to social supports (e.g., family members, church, friends);
- Other needs or barriers identified by the participant that impedes his or her ability to participate in W-2 activities or find and retain a job.

Because these additional informal assessment inventory items are not eligibility requirements, the FEP must never delay eligibility determination and initial placement because one of these items is pending. The placement decision must be made using the best available information during the application timeframe. (See [1.4.4](#))

If an applicant is new to W-2 or is re-applying and does not have the **Job Readiness** page completed in WWP, the job readiness assessment must be scheduled within 30 days of application and completed within 30 days of placement. If a current participant does not have the **Job Readiness** page completed in WWP, the job readiness assessment must be scheduled within 30 days of an EP review and completed before the next EP review.

If an applicant is new to W-2 or is re-applying and does not have the **Career Assessment** page completed in WWP, the career assessment must be scheduled

within 30 days of application and **should be** completed within 30 days of placement. If a current participant does not have the **Career Assessment** page completed in WWP, the career assessment must be scheduled within 30 days of an EP review and **should be** completed before the next EP review.

Informal assessment must also include observations by the worker about the individual's ability to follow through on assigned activities and/or perform job search. When an applicant or participant is having difficulty completing assigned activities, this may be an indication of underlying barriers to employment and should result in further conversations with the individual about the appropriateness of the activities being assigned and the need for additional supportive services.

5.4.1 Career Assessment Overview

Career assessment is a broad spectrum of assessment tools that W-2 agencies, applicants, and participants use to obtain greater awareness about an individual's work styles, skills, and interests. Results can be used to define a career path, assign meaningful activities, highlight strengths, identify training needs, and match the individual to employment opportunities.

More than one tool may be required to capture the three required elements:

- *Work styles* – Refers to an individual's patterns of action or conduct, such as attendance, punctuality, appropriate appearance, ability to work with others, obeying rules, following directions, and completing tasks. Work style-focused career assessments can demonstrate the individual's attitudes and job readiness.
- *Skills* – Refers to an individual's skills or understanding of specific tasks related to employment, like cooking or computer programming. Skills-focused career assessments can include knowledge, aptitude, and ability. Skills can relate to a particular occupation, as typically listed in a job announcement to describe the tasks of a position.
- *Interests* – Refers to an individual's likes of particular objects, activities, and values using the theory that people with the same career tend to have the same interests. Interest-focused career assessments help individuals identify work-related interests and find the types of careers that match. The results can be used to help individuals learn which careers they are most likely to enjoy.

Do not use educational needs assessment tools in place of career assessment tools. Use educational needs assessment tools in tandem with career assessment tools to identify the education and training needed to allow individuals to obtain employment that fits their work styles, skills, and interests. The results of both assessments complement each other and inform the EP development and assignment of meaningful activities.

(See [5.1.2](#))

The W-2 agency must offer career assessments to all applicants and participants. However, career assessments are not required to be completed as a condition of eligibility for the W-2 program. An applicant or participant may decline completing a career assessment for any reason.

5.4.2 Career Assessment at Application

FEPs must use informal assessment information when determining the initial placement for W-2 applicants. (See [7.1](#)) While career assessment is a component of the informal assessment, FEPs are required to develop career goals with all W-2 participants using the information available at initial placement.

Career assessment must be offered to all applicants and assigned as an activity on the initial EP. If an applicant is new to W-2 or is re-applying and does not have a career assessment documented in [WWP](#), a career assessment must be scheduled within 30 days of application and **should be** completed within 30 days of placement. If an applicant is not ready to identify a specific career field when the EP is initially developed, the focus of the program employment goal may be broadened to a field of interest or an industry sector. (See [6.1.1](#))

Because career assessment is not an eligibility requirement, the FEP must never delay eligibility determination and initial placement pending completion of a career assessment tool. The placement decision must be made using the best available information during the application timeframe. (See [1.4.4](#)) The EP and W-2 placement may be adjusted later, if needed, when the career assessment results are received.

If an applicant has completed a career assessment that identifies work styles, skills, and interests, and wants to remain on the career path indicated by that assessment, or is already working in a career field available in the local labor market, another career assessment does not need to be done.

5.4.3 Using and Documenting Career Assessment Results

Career assessments and career exploration tools are used to help identify sectors, career pathways, training needs, and family-sustaining employment goals that match the results of the assessed work styles, skills, and interests. Career assessment tools can be administered throughout ongoing case management as an individual's skills, goals, and work readiness may change.

As an EP is developed, it is important to consider how the program employment goals fit into the applicant's or participant's longer-term career plan. Many industries have career

pathways that enable employees to start in lower-skilled jobs and progress into increasingly higher paying jobs through training. The EP should identify any goals that are part of the individual's longer-term career plan. (See [6.1.1](#))

If a current participant does not have a career assessment documented in *WWP*, the career assessment must be scheduled within 30 days of an EP review and **should be completed** before the next EP review.

Assign Career Assessment as an activity on the EP. (See [6.4.1](#))

- Assign Activity Code UC (Up-front Career Planning) for applicants who receive up-front career planning services geared toward assessment of their career interests and guidance in the career planning process. This activity must be ended at time of W-2 placement.
- Assign Activity Code CE (Career Planning & Counseling) for participants who receive career planning and counseling services geared towards assessment of their career interests and guidance in the career planning process.
- Assign Activity Code OC (Occupational Testing) for participants engaged in occupational testing related to employment. For example, some employers may require a typing test for a clerical position.

Post career assessment results on the **Career Assessment** page in *WWP*, including related occupations and how the career assessment results are being applied to the EP and activities. The FEP must discuss career assessment results with the individual and give them the opportunity to provide input on their W-2 placement and the activities that are assigned as part of the EP.

Scan assessment results into the participant's Electronic Case File (ECF) using code *WVAS*.

If the applicant or participant has declined completing a career assessment, the worker must document that in PIN Comments.