

# *Trainer's Notes*

## **BEST in Action:**

### **Focus on Assessment**

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#### **Purpose**

To expand experienced W-2 Case Managers' knowledge of assessment results and their impact on participant progress.

#### **Objectives**

Upon completion of this course, you will be able to:

- Draw conclusions about how assessment results relate to case management actions.
  - Analyze how different assessment results influence and impact participants.
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**Materials**

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Laptop  
PowerPoint  
Projector  
Dice (3)  
Stands (3)  
Printed Season Cards from TN Appendix B  
ZOOM or RE-ZOOM Picture Cards for Zoom Activity  
Cardstock for Name Tents  
Printed Additional Assessments from TN Appendix D  
Evaluations

**Note to Trainer:** Ask learners to include their length of time in W-2 on their name tents.

**Suggested Pace**

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This is a 6-hour course. The following agenda is the suggested pace.

9:00 – 9:30	Introduction, Zoom Activity
9:30 – 10:10	Balance, Applying Balance to Assessments Activity
10:15 – 10:30	<i>Break</i>
10:30 – 11:15	Spotlight on Career Assessment
11:15 – 12:05	Exploration, Impact of Multiple Assessments Activity
12:05 – 1:05	<i>Lunch</i>
1:05 – 1:40	Spotlight on Educational Needs Assessment
1:40 – 2:10	Sensitivity, Applying Sensitivity to Assessment Activity
2:10 – 2:30	Spotlight on Informal Assessment Inventory
2:30 – 2:45	<i>Break</i>
2:45 – 3:15	Trust, Building on Trust Activity
3:15 – 3:50	Pick your Spotlight
3:50 – 4:00	Closure

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## Introduction

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### PPT 1

Welcome to BEST in Action: Focus on Assessment! Today, we take BEST to the next level by diving into how to use assessment results in your case management practices and how those results impact participants. Throughout the day, you'll have opportunities to work together and see the BEST approach in action. Additionally, we'll shine a spotlight on various types of assessments to explore how each of these assessments impact participants and your case management practices.

Assessment is a big part of what you do. Has there been a time when you were working with a participant, and you wished you had all the information you needed at that first appointment? While that may be helpful for you, it could be overwhelming for the participant to give you all that information during their first appointment! Although it would be nice to have all the information right away, in reality, you only get little bits and pieces of the big picture at a time.

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### *Zoom Activity*

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### PPT 2



### PG 4

**Purpose:** Learners demonstrate the importance of capturing an entire story.

**Materials:** ZOOM or RE-ZOOM picture cards

**Time:** 30 minutes

**Directions to Trainer: Part One:** Pull a sequential number of the picture cards, enough for each learner to have one card. Randomly hand out the cards to learners. Give them 15 minutes to complete Part One.

**Trainer Instructions to Learners: Part One:** To understand a participant's story, you need to see both the big picture and the small details. In a moment, I will hand each of you a picture.  Do not show your picture to anyone. Each picture shows a scene that tells a story when put in order with other scenes. Your job is to  describe your picture to others and put the scenes of the story into the correct sequence. Create a line of where you think your picture fits in the story.

 PPT 3

**Directions to Trainer: Part Two:** Give learners five minutes to complete Part Two. It may be helpful for them to lay the story out on a table in order to walk through the sequence.

**Trainer Instructions to Learners: Part Two:** Now, you can show each other your pictures. Re-order yourselves so that you're in the correct sequence.

**Debrief:**

What approach did you take to describe your picture?

*Possible Responses:*

- *Picked up on similarities from other learners.*

What did you notice about how others described their picture?

*Possible Responses:*

- *I knew where I was at based on the information I got from others.*
- *We started to make group conversations versus one-on-one conversations.*
- *People describe everything differently.*

After you saw others' pictures, did you get what they were describing? Why or why not?

*Responses will vary.*

How did it feel to have only one piece of the whole picture?

*Possible Responses:*

- *I felt like I was getting bread crumbs.*
- *I wanted to know what else was going on, but couldn't because I was focused on my picture.*

 PPT 4

Now take a couple of minutes to answer the two questions in your Participant Guide.

Share your answers with a partner at your table. Discuss the similarities and differences in your answers.

**Note to Trainer:** These are the questions in the Participant Guide. You don't need to go through the answers as a group after they discuss with a partner.

- *How was this activity similar to working with W-2 participants?*
- *How do you ensure you see the big picture when working with a participant?*

Throughout the day, keep in mind each assessment you complete with participants is just one piece of the bigger picture. You apply BEST to your case management practices when you look at not only the individual pieces, but also how they connect with and impact each other.

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## Balance




### PPT 5

#### PG 5

Remember, when it comes to assessment, Balance in the BEST approach means creating opportunities for you and the participant to have a conversation. You balance collecting the information you need with understanding the participant's current situation and story. You also need to balance incorporating existing information with gathering new information.

With a partner, discuss how you incorporate Balance into your assessment conversations.

### PPT 6

As I said earlier, you also need to balance incorporating and using existing information with gathering and using new information. When participants provide new assessment information,  consider how it may impact prior assessment information. Pay close attention to how the new assessment might  support or conflict with prior information. After you review all these impacts, bring the information to participants for further  conversation. Discuss what you noticed with participants and ask for their thoughts as well. Were there any outside factors, like an emergency or a rough day, when the participant took one of the assessments? Has the participant's situation significantly changed since a prior assessment?

### PPT 7

**Note to Trainer:** If the conversation with these questions gets too focused on formal assessments, re-direct the conversation to include all assessments.

**Ask** By show of hands, who has received conflicting assessment information?

**Ask** How did you balance the pre-existing assessment information with new assessment information?

*Possible Responses:*

- *Active listening to ensure you hear the participant.*
- *Ask the participant how they feel about the information.*
- *Start small with baby steps.*

**Ask** How did the participant respond to your approach?

*Responses will vary.*

**Ask** What do you do when you're not sure how to balance the conflicting assessment information?

*Possible Responses:*

- *Ask a co-worker and/or supervisor for advice.*
- *Follow up with the assessment provider to see if they can provide more information.*
- *Set up a meeting with participant, provider(s), and yourself, if possible.*

### ***Applying Balance with Assessments Activity***

 PPT 8

 PG 6



 TN Appendix A 30

**Purpose:** Learners practice applying Balance with assessment information.

**Materials:** Participant Guide

**Estimated Length:** 30 minutes

**Directions to Trainer: Part One:** Divide learners into groups of two or three based on years of experience. For example, partner someone with two years of experience with someone with four years of experience. Give learners seven minutes to complete Part One.



**Trainer Instructions to Learners: Part One:** With a partner,  review the summary in your Participant Guide and  discuss the corresponding question.

 PPT 9

 PG 7

**Directions to Trainer: Part Two:** Give learners ten minutes to complete Part Two.

**Trainer Instructions to Learners: Part Two:** Chloe is here for her appointment.

Review her  new information. Then, answer the  questions in your Participant Guide. Designate a spokesperson to report out for your group.

**Debrief:**

How did your group balance Chloe's career exploration, her daughter's needs, and your initial plan for the appointment?

*Possible Responses:*

- *Give her space to make a change.*
- *Validate her thoughts/feelings.*
- *Address her core needs first.*

How did you apply the concept of Balance with Chloe?

*Responses will vary.*

In what ways can you incorporate more Balance into your case management practices?

*Possible Responses:*

- *Be prepared to pivot.*
- *Empower the participant to take control. You can't fix everything.*

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## Spotlight on Assessment: Career Assessments

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 PPT 10

 PG 8

As you can see from Chloe's scenario, Career Assessments can play a large role in your case management practices. So, it is our first spotlight on assessment!

Remember, policy requires that career assessments must cover work styles, skills, and interests. This includes participants' work personality, such as their attitude and work ethic, the skills they already have, and potential careers that align with participants' interests. The most common way you use career assessment results is to help both you and participants create goals.



**Ask** How else can you use Career Assessment results in your case management?

*Possible responses:*


- *Tailor your approach to match the participant's personality.*
- *Identify strengths or gaps in skills and training needs.*
- *Re-engage the participant.*
- *Highlight participants' strengths.*
- *Spark conversation or exploration of barriers.*


While policy requires all three elements, it doesn't require which specific Career Assessments you must use. So, your agency gets to pick. This means each agency may use different assessments.

There may be times when you need to review and gather information from other agencies' Career Assessments. The most common instance of this is when participants transfer agencies. While you might not be familiar with that specific assessment, you can usually figure out the key information.

### ***Closer Look at Career Assessments Activity***

 PPT 11

 PG Appendix A (WOWI Confidential Report 22-26, WOWI Career Report 27-30, Practical Cognofile 31-35)


 TN Appendix B 31, TN Appendix C 32 (WOWI Confidential Report 33-37, WOWI Career Report 38-41, Xyte Cognofile 42-46)


**Purpose:** Learners practice identifying key pieces of information from different types of Career Assessments.

**Materials:** Season cards from TN Appendix B, station labels from TN Appendix C, stands

**Estimated Length:** 25 minutes

**Directions to Trainer:** Place cards representing three seasons at each table group, one for each learner. Create three stations around the room. Each station should include copies of one station label and a season card. Give learners eight minutes at their first station. After time is up, instruct learners to move to the next station, and give them six minutes. Repeat one more time so that learners visit every station. You may want to have one trainer near the Xyte Cognofile group to help them. Then, have them return to their seats to discuss the debrief questions.

**Trainer Instructions to Learners:** We're going to give you the opportunity to practice identifying key pieces of information from a variety of Career Assessments. Notice that there are season cards at your table. Everyone, pick a card. When I say go, move to the table that matches your season card. Then, work together to  review the Career Assessment and jot down the key information you would discuss with that participant.

This information could be  potential careers, what to look for or avoid in employment, or follow-up questions you may have for them. Take a few minutes to review the assessment and jot down the key information. When I say time is up, move on to the next Career Assessment. Note that a different participant took each Career Assessment. You will do this for three assessments.

### Debrief:

How did your group draw conclusions about the relationship between the assessment results and potential case management actions for each participant?

*Responses will vary.*

What type of follow up conversations might you have with these participants?

*Possible Responses:*

- *WOWI Career Report:*
  - *Discuss/research more jobs that align with the participant's high job satisfaction indicators (rigorous, dominant, specific instructions, and versatile).*
- *WOWI Confidential Report:*
  - *Discuss the low score in the numerical category.*
  - *Explore Educational Needs Assessments and/or basic education classes.*
- *Xyte Cognofile:*
  - *Brainstorm ways to handle dislike of structure, responsibility, and planning.*
  - *Discuss how to use motivating factors at work.*

How might you apply this discussion to effectively guide participants when their assessment results present a range of potential career paths?

*Responses will vary.*

## Exploration


 PPT 12


 PG 9


The results of a Career Assessment might lead to further exploration. Part of Exploration in the BEST approach is digging deeper into assessment information. This goes beyond exploring what the result of a single assessment means to participants. It involves exploring how multiple assessment results relate to and impact each other. It also means ensuring the participant understands the results. By zooming out to see the big picture, you gain a more complete understanding of participants' situations. This big picture view allows you to provide personalized case management.


## PPT 13

When you explore participants' assessments, consider the following:

 **Compare and Contrast:** Pay close attention to the similarities and differences in the assessment results. Are all the results pointing the participant toward one direction or goal? If not, is it just one assessment that is unusual for that participant, or are the results all over the place?

 **Dig Deeper to Find Connection:** When you look at assessment results, do not take them at face value. Dig deeper to see how prior results may have impacted the current results. Could the participant's reading levels impact their Career Assessment results? Do they need accommodations to ensure accurate results?

 **Partner with Participants:** After you've explored the various assessment results and noted connections, share your findings and insight with the participant. Then, ask the participant to share their thoughts. Remember, participants know themselves best. They might have different insights you never would have thought of.

 **Follow Up:** Situations change all the time. Follow up with participants on an ongoing basis to see if anything has changed. Complete new assessments or re-do prior assessments as needed to ensure you have the most current, and accurate, information possible.

## PPT 14

**Note to Trainer:** Slowly read the following two paragraphs in order for learners to best hear and follow along with the scenario.

Let's say you are working with a participant, Houa. She has a high school diploma, and is passionate about getting a job in the medical field. Her Informal Assessment information aligns with this career path. You get Houa's Career Assessment results back, and are shocked to find out the results suggest a career in factory work. So, you partner with Houa to discuss the results. During that conversation, she discloses that she has a low reading level and did not understand most of the questions in the Career Assessment.

So, you make a plan for Houa to complete the Career Assessment again. This time, someone will read the questions to her and provide clarification, if needed, to ensure accurate results. You also discuss the steps Houa can take to increase her reading levels.

This is just one example of how exploring assessment results can impact your case management practices. **Ask** How else might assessment results impact each other?

*Possible responses:*

- *Concentration deficit may impact tests, like TABE and Career Assessment.*
- *Medication from a formal assessment might have side effects that lead to concentration deficits or other physical impacts.*
- *Mental health condition might lower someone's motivation, which skews Career Assessment results.*

**Ask** How do your case management practices benefit from exploring the impact of assessment results with participants?

*Possible Responses:*

- *Participants have more buy-in for the assessment process.*
- *Participants see the 'what's in it for me'.*
- *Together, you can come up with a more effective plan.*

By looking at all the assessment results together, you can understand participants' situations more fully and make well informed case management decisions.

### ***Impact of Multiple Assessments Activity***

 PPT 15

 PG 10-11



 TN Appendix D 47-50

**Purpose:** Learners experience how multiple assessments impact the direction of case management practices.

**Materials:** Printed additional assessments from TN Appendix D

**Estimated Length:** 45 minutes



**Directions to Trainer: Part One:** Divide learners into four groups. Give groups ten minutes to complete Part One.

**Trainer Instructions to Learners: Part One:** Now, you'll get the opportunity to explore multiple assessments. As you work on this activity, focus on the assessment results, how they relate to and impact each other, and how those results lead to you gaining a better understanding of the participant. In a moment, we're going to put you into four groups. As a group,  review the Informal Assessment and Career Assessment summaries in your Participant Guide. Work together to  highlight key information you need to consider as you work with this participant.

 PPT 16

**Directions to Trainer: Part Two:** Provide each group with one additional assessment. Give each group a different additional assessment. Give groups six minutes to complete Part Two. The additional assessments are:



Medical Examination and Capacity form  
Mental Health Report  
Vocational Evaluation  
Informal Assessment Inventory

**Trainer Instructions to Learners: Part Two:** Next, we'll provide your group with one unique assessment. As a group,  review the new assessment.  Discuss how the new assessment impacts the information you already have, and what follow up, if any, you want to have with the participant. Record your results in your Participant Guide.

 PPT 17

**Directions to Trainer: Part Three:** Instruct the Mental Health and Vocational Evaluation groups to combine, and the Medical Assessment and Informal Assessment Inventory groups to combine, to form two groups. Give them six minutes. Have each of the two groups document the combined impact of both the Mental Health Assessment and the Vocational Evaluation for group one, and the Medical Assessment and Informal Assessment for group two. Have each of the two large groups document on a piece of printer paper the results/impacts of the two groups. After six minutes, have each group share a summary of their additional assessments and the impact those assessments had on the participant.

**Trainer Instructions to Learners: Part Three:** Finally, we're going to merge your group with one other group. The group with the Mental Health Report will merge with the group with the Vocational Evaluation, and the group with the Medical Examination and Capacity form will merge with the group with the Informal Assessment Inventory.

 Share your unique assessments with each other.  Discuss how the new assessment impacts the information you already have, and what follow up, if any, you want to have with the participant. Select one person to share a summary of your additional assessments and the impacts they had.

**Debrief:**

What did you notice when reviewing the multiple assessments?

*Possible Responses:*

- *Some of the results don't seem to match.*
- *It's difficult to know what to focus on/what is the most important piece of the puzzle.*
- *You get a better overall picture when you look at multiple assessments.*

What did you want to follow up on with the participant?

*Possible Responses:*

- *How they felt about the results.*
- *What do they want to do about it?*
- *Do they agree or disagree with the results?*

How might have the information from the other two assessments influenced your case management practices?

*Responses will vary.*

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## Spotlight on Assessment: Educational Needs Assessments

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 PPT 18


 PG 12

So far, we have looked at a variety of assessments, but what about the Educational Needs Assessment? Policy states who must have an Educational Needs Assessment, and when. In some instances, as part of a broader Educational Needs Assessment, you and the participant may find it beneficial to complete a Standardized Educational Assessment.

Standardized Educational Assessments provide valuable insight into participants' current learning abilities and educational challenges. When you look at the results, do you know what they mean? Or, do you hope someone else knows? Even if someone else administers the Standardized Educational Assessments for your agency, it's important that you know what the results mean. You use this information to tailor your case management practices and support participants in moving toward self-sufficiency.


One of the most common Standardized Educational Assessments is the Test of Adult Basic Education, or TABE. The TABE provides scores that measure different skill sets such as reading, mathematics, and language. Most agencies use TABE 11/12, so we're going to focus on that one specifically.

 PPT 19


The first section on the assessment is the Content Area. There are three areas:  language, mathematics, and reading. The language area contains questions about vocabulary words, standard English conventions, types of texts and their purposes, and understanding of language. The mathematics area tests for math equations, fractions, geometry, data and measurement, and other math functions. The reading area contains questions about phonics, word recognition, and identifying details and main ideas in texts.

## ☀ PPT 20


The next section is Level. **Ask** Who knows what information goes in this section?

**Note to Trainer:** If someone knows, have them share with the class. If nobody knows, provide the information in italics.  *The letter indicates which test form the participant used when taking the TABE. There are five levels – L (Literacy), E (Easy), M (Medium), D (Difficult), and A (Advanced).*

## ☀ PPT 21

One of the most important sections for you to look at is the Scale Score. The Scale Score is a number between  300 and 800, which relates to an estimated grade level. For example, if a participant receives a Scale Score of 542 in Reading, they have a 6<sup>th</sup> grade reading level. There is a chart of Scale Scores and their equivalent grade levels for each Content Area in your Participant Guide.


## ☀ PPT 22

The National Reporting System, or NRS, Level also relates to the participant's  grade level. There are six NRS Levels. The higher the Scale Score, the higher the NRS Level.

### ***Closer Look at Standardized Educational Assessments Activity***

## ☀ PPT 23

 PG Appendix B (Khadija 37, Margie 38, Lee 39)

 TN Appendix B 31, Appendix E 51 (Khadija 52, Margie 53, Lee 54)



**Purpose:** Learners practice reading Standardized Educational Assessments.

**Materials:** Element cards from TN Appendix B, station labels from TN Appendix E, stands

**Estimated Length:** 20 minutes

**Directions to Trainer:** Place cards representing three elements at each table group, one for each learner. Create three stations around the room. Each station should include one station label and an element card. Give learners five minutes at each station. After time is up, instruct learners to move to the next station. Repeat one more

time so that learners visit every station. Then, have them return to their seats to discuss the questions for each participant. Then, do the remaining debrief questions.

**Trainer Instructions to Learners:** We're going to give you the opportunity to practice working with Standardized Educational Assessments. Notice that there are element cards at your table. Everyone, pick a card. When I say go, move to the table that matches your card. Work together to  review the scenario and TABE. Then,  discuss the questions at that station. You have five minutes to review the assessment. When I say time is up, move on to the next station. You will do this for three assessments.

**Debrief:**

How did your group draw conclusions about the relationship between the assessment results and potential case management actions for each participant?

*Responses will vary.*

What type of follow up conversations might you have with these participants?

*Possible Responses:*

- *What did you expect your levels to be at?*
- *What other factors might have influenced your results?*

How might you apply this discussion to effectively guide participants when their assessment results surprise them?

*Responses will vary.*

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## Sensitivity



 PPT 24

 PG 13


Often, you use Sensitivity when discussing surprising assessment results. Sensitivity in the BEST approach means you acknowledge what participants are going through. At times, you may need to nudge them outside of their comfort zone and challenge their realities. As you have conversations about assessment, pay attention to participants' verbal and non-verbal cues. Their words and body language can tell you a lot about how they may be feeling. Be empathetic and sincere as you work with them.




## ☀ PPT 25

You may need to  gently challenge participants when there are conflicting assessment results. When this happens, start with the first two steps we talked about in Exploration: compare, contrast, and dig deeper to find connections. When it comes time to partner with the participant, be sensitive as you discuss the information. Try to  see the assessments from the participant's perspective by asking about:

- The differences in the scope and focus of the assessments,
- Their motivation and confidence during the assessments, and
- Other factors that might have impacted the results, such as distractions, testing conditions, and comfort levels.

Pay close attention to the parts of the assessments participants agree with and which parts they disagree with.  Reinforce the areas of agreement, and use that

information as a starting point to the rest of the discussion. Then,  dig deeper into the discrepancies. If you notice the participant disagrees with something you believe is true, and they seem open to further discussion, gently nudge them to challenge their beliefs. Use provocative and evocative questions to get participants thinking about the results in a new way. Some questions you might ask include:

- Imagine that the assessment results are accurate. Describe to me how that would make you feel.
- What do these emotions tell you about yourself?
- If you were to look at this assessment through someone else's eyes, what view point do you think they might offer?
- These assessment results are not just a reflection of your current abilities, but also an opportunity for growth and development. How might you approach this situation with that perspective in mind?
- What specific aspects of the assessment do you agree with?

If they don't seem open to further discussion, save the conversation for another day.

## ☀ PPT 26

As you can see, sensitivity, empathy, and sincerity are all important when working with participants, especially when it comes to misalignment in assessment results. Imagine a participant you're working with is passionate about a career path, but their TABE results show they are not ready for that career yet.

**Ask** How could you use Sensitivity to approach this situation?

*Possible Responses:*

- *Acknowledge their passion.*
- *Discuss realistic expectations within the program.*
- *Talk about steps they could take now to get to that career later.*
- *Point out that the TABE results are an indication of only their current skill level.*
- *Break the conversation up into a couple of meetings.*
- *Check your own bias first.*

**Ask** What might this conversation look and sound like?

*Possible responses:*

- *Start by asking the participants for their understanding/interpretation of the results just shared.*
- *Make sure time is available and that the appointment/discussion isn't rushed.*
- *Must read non-verbal as well as verbal responses given by the participant.*
- *Normalize the average TABE result level.*

### ***Navigating Conflicting Assessment Results with Sensitivity Activity***

 PPT 27



 PG 14

**Purpose:** To recognize and empathize with the challenges of career path misalignments between TABE results and Career Assessment results, and to develop strategies to support participants in navigating this conflict with sensitivity and sincerity.

**Materials:** Participant Guide

**Estimated Length:** 20 Minutes

**Directions to Trainer:** Divide learners into groups of four to five. Give them six minutes to discuss and analyze the case study, and come up with strategies for supporting Sam. Have each group designate a spokesperson who will share their strategies for this case study.

**Trainer Instructions to Learners:** Let's explore this a little more with a case study. In a moment, you'll work with your group to  review a case study that involves conflicting TABE and Career Assessment information. We know it can be difficult to have these types of conversations with participants. The key here is to be sensitive. After you review the case study,  brainstorm potential strategies for supporting Sam using Sensitivity. Write the strategies in your Participant Guide. Designate a spokesperson to share your group's results with the class.

Now take a few minutes to individually reflect on what you've learned from each other.

**Note to Trainer:** Allow a couple of learners to share their takeaways, but don't force it.

Through this activity, you have explored the challenges surrounding career path misalignments in assessments, and have heard or developed strategies for providing meaningful support to participants facing such challenges. By encouraging sensitivity, empathy, and sincerity in your interactions with participants, you're better equipped to facilitate positive outcomes in their educational and career searches.

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## Spotlight on Assessment: Informal Assessment Inventory

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 PPT 28

 PG 15

You do not use Sensitivity only with Educational Needs and Career Assessments. You use it with all assessments, including Informal Assessment. In addition to the information you gather through the Informal Assessment, you must cover nine Informal Assessment Inventory items.

**Ask** What are they?

*Responses:*

- 1. Personal strengths, interests, and goals;*
- 2. Job Skills (including transferrable skills);*
- 3. Job readiness (including work preferences, history, applications, interviews, and contacts);*
- 4. Recent job search efforts;*
- 5. Results from Career Assessments that evaluate work styles, skills, and interests;*
- 6. Current neighborhood environment and schools;*
- 7. Household budgeting/money management strategies;*
- 8. Access to social supports (e.g., family members, church, friends);*
- 9. Other needs or barriers the participant identifies that impedes their ability to participate in W-2 or find and retain a job.*

 PPT 29

Two of these items, job readiness and results from career assessments, have their own pages in WWP, so we are not going to go into detail on them today. Additionally, a lot of information can fall under the "other needs and barriers" item. So, we are not going to discuss that one in much detail either. Instead, we are going to look at the other six items.

### ***Closer Look at the Informal Assessment Inventory Activity***

 PPT 30

 PG 16

 TN Appendix B 31


**Purpose:** Learners share how specific inventory items impact their case management practices.

**Materials:** Animal cards from TN Appendix B, die

**Estimated Length:** 15 minutes

**Directions to Trainer:** Place cards representing three animals at each table group, one for each learner. Create three stations around the room. Each station should have an animal card and a die. Instruct learners to move to the station that matches their card. Give them ten minutes. After time is up, have groups share their responses. Here is the chart in their guide.

Inventory Item	How does this information impact your case management practices?
1. Personal strengths, interests, and goals	
2. Job skills (including transferable skills)	
3. Recent job search efforts	
4. Current neighborhood environment and schools	
5. Household budgeting/money management strategies	
6. Access to social supports (e.g., family members, church, friends)	

**Trainer Instructions to Learners:** Notice that there are animal cards at your table. Everyone, pick a card. When I say go, move to the table that matches your card. Take turns  rolling the die and answering the question in your Participant Guide for that item. Keep taking turns and answering the question until time is up. If you land on the same item, try to think of another answer to the question.

**Debrief:**

**Ask for volunteers to share** when Informal Assessment Inventory information made a difference in their case management practices.

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## Trust

 PPT 31

 PG 17

The final part of BEST, Trust, is crucial when working with assessments. You must build a foundation of trust so that participants feel comfortable sharing personal information. A trusting relationship empowers the participant to make a change and believe that they can take steps toward self-sufficiency.

**Ask** What does empowering participants look like?

*Possible Responses:*




- *Respecting participants' autonomy to make their own decisions.*
- *Creating an environment where participants make choices and don't take chances.*
- *Use reflections to show that you're listening.*

**Ask** How do you empower participants to use their assessment results to move toward self-sufficiency?

*Possible Responses:*

- *I ask participants how they feel about the results and what the results mean to them.*
- *Ask participants how they want to use this information to work toward their goals.*
- *Offer realistic options and supports that enable the participant to move forward*

 PPT 32

After you use the information, make sure you follow up with participants on their assessment results. This shows that you  care, and are  using the assessment results like you said you would. Participants need to know that you will follow through with your  commitments throughout the time they are on W-2. If you realize you are not following through on your commitments, own up to it, commit to do better, and move forward with the participant.

## ☀ PPT 33

Building trust and empowering participants to be an active participant in the assessment process also means you need to explain the assessment process to the participant. Participants may be reluctant to complete an assessment.

**Ask** What might be a clue that participants are reluctant to complete an assessment to the best of their ability?

*Possible Responses:*

- *Participant doesn't engage in conversation*
- *If they do complete it, the results may seem "off"*

**Ask** By show of hands, who has experienced this with a participant?

**Ask** for volunteers to share how they handled that experience.

If you have established that foundation of trust and the participant's assessments seem "off," loop back and take another look at the prior assessments. Are the results still relevant? Would the participant benefit from reassessment? If they would, be sure to explain the difference the reassessment can make in your case management practices.

### ***Building on Trust Activity***

## ☀ PPT 34

📄 PG 18, Appendix C 40-46 for Part One, 47 for Part Two

👉 TN Appendix F 55-62

**Purpose:** Learners identify patterns in assessment results and empower participants.



**Materials:** Participant Guide

**Estimated Length:** 20 minutes

**Directions to Trainer: Part One:** Divide learners into groups of four to five. Give them seven minutes to review the scenario/Career Exploration Inventory and discuss the questions in their Participant Guide. Here are the questions in their guide:



What patterns did you identify in Mattie's Career Exploration Inventory?

How would you bring this up with Mattie?

**Trainer Instructions to Learners:** We are going to give you the opportunity to practice building from a foundation of trust with a scenario. Start by  reviewing the scenario and Career Exploration Inventory with your group. Then,  discuss the questions in your Participant Guide.

## PPT 35

**Directions to Trainer: Part Two:** Give learners five minutes to complete Part Two.

**Trainer Instructions to Learners:** We have additional information from Mattie.  Review the new information in Appendix C of your Participant Guide. Then, as a group,  brainstorm how this new information impacts your case management practices.

### **Debrief:**

**Ask** What did you think when you first reviewed Mattie’s Career Exploration Inventory?

**Ask** How did Mattie’s perspective change your initial thoughts?

In this scenario, the other Case Manager might have thought they followed through on their commitment to clearly explain what the assessment was and how they planned on using it; however, it was not clear to Mattie. This led to confusion and frustration for everyone involved.

**Ask** What checks and balances do you use in your case management practices to ensure everyone follows through on their commitments?

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## **Pick Your Spotlight**

## PPT 36

## PG 19

So far, we’ve shined a spotlight on three different assessments. For our final spotlight, you get to pick which assessment we look at. You have two options: Mental Health Report, and Medical Examination and Capacity form. Before you vote, I will give you a brief description of what each spotlight is about.

**Mental Health Report** – In this spotlight, we closely look at section 11, which is about functional limitations, and section 15, which is about mental abilities and aptitude. Then, we’ll discuss how providers’ responses to those questions may change your case management practices.

Medical Examination and Capacity form – In this spotlight, we focus on questions surrounding participants' treatment plans, progress, and potential roadblocks. Then, we'll discuss how providers' responses to those questions may change your case management practices.

You can vote for only one assessment to spotlight. Raise your hand when I say the assessment you want to learn more about.

**Note to Trainer:** Click on the corresponding circle in the PPT to get to that section's slides. If you need to return to the Pick your Spotlight slide, click on the DFES/Partner Training Team text on slides 41 and 47.

 TN Mental Health Report 24-26

 TN Medical Examination and Capacity 26-29

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### Spotlight on Assessment: Mental Health Report

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 PPT 37

 PG 19

The Mental Health Report provides you with a lot of information about the participant, and makes a huge impact on your case management practices. When possible, first review the Mental Health Report on your own to make sure you understand the information. Follow up with the professional if you have any questions. Then, go through the assessment with the participant to gather their feedback and thoughts.

This is especially important with sections 11 and 15. Section 11 is all about limitations and the degree of that limitation. Go through each limitation with the participant. Try to break down the information so that it is easy to understand. For example, instead of saying the participant has a marked restriction of activities of daily living, try rephrasing it to say the provider believes the participant may have a hard time doing several everyday tasks, like cooking, cleaning, and taking care of their kids. Then, discuss how each limitation may impact the participant and your case management practices.

 PPT 38

Look at the three other limitations on the screen. With a partner, discuss how you could rephrase each limitation so that it is easier to understand.

**Note to Trainer:** After everyone is done, or six minutes pass, ask for volunteers to share how they would rephrase the limitations.



## ☀ PPT 39

Another section that sparks discussion is section 15, mental abilities and aptitude. Again, go through each one with the participant. Talk specifically about how the rating may impact them. Pay close attention to any patterns. Is the participant good with people, but can't handle work stress well? How does the participant handle routines and attendance? What about their interpersonal skills?

## ☀ PPT 40

Discuss how these patterns impact the participant and how you can adjust your case management practices because of them. Be sure to discuss potential accommodations as well.

### *Closer Look at Mental Health Report Activity*

## ☀ PPT 41

📄 PG Appendix D (Francesca 49-50, Nevaeh 51-52, Lily-Rose 53-54)

👉 TN Appendix B 31, Appendix G 63 (Francesca 64-65, Nevaeh 66-67, Lily-Rose 68-69)

**Purpose:** Learners interpret sections 11 and 15 of the Mental Health Report.

**Materials:** Transportation cards from TN Appendix B, station labels from TN Appendix G, stands

**Estimated Length:** 15 minutes

**Directions to Trainer:** Place cards representing three modes of transportation at each table group, one for each learner. Create three stations around the room. Each station should have one station label and a transportation card. Instruct learners to move to the station that matches their card. Give them ten minutes.

**Trainer Instructions to Learners:** We're going to give you the opportunity to practice working with Mental Health Reports. Notice that there are transportation cards at your table. Everyone, pick a card. When I say go, move to the table that matches your card.

Work together to 🖱 review the scenario and Mental Health Report. Then, 🖱 discuss the question at that station. You have four minutes. When I say time is up, move on to the next station. You will do this for three assessments.

**Debrief:**

How did your group draw conclusions about the relationship between the assessment results and potential case management actions for each participant?

*Responses will vary.*

How might you apply this discussion to effectively guide participants when their assessment results present challenges?

*Responses will vary.*

**Note to Trainer:** If enough time allows, you may want to complete the other Spotlight on Assessment. If not, go to the conclusion.

 TN Conclusion 29

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## Spotlight on Medical Examination and Capacity

 PPT 42

 PG 19

As a Case Manager, gathering information through a formal assessment can be a great asset to you being able to assist and engage participants. Through the formal assessment, you get the What. Knowing how to read and apply the information you've gathered is the Now What, which is what we want to focus on today. We need to know what to do with the information we've received.

A Formal Assessment establishes the extent, severity, and effect of any disability, along with the need for services and accommodations.

We're going to take a closer look at a few of the questions on the Medical Examination and Capacity form, and discuss how this relates to or changes case management practices. We want to be able to use all the information we can to guide, coach, and nudge the participant to reaching their goals.

 PPT 43

**Question #5** When did your patient's symptoms begin (estimate date)?

Is it likely that your patient's symptoms will last 6 months or longer? Yes No

Is it likely that your patient's symptoms will last 12 months or longer? Yes No

Further discussion may include exploring what led up to the symptoms. What was happening/going on in their lives at the time these symptoms began? Were there any extenuating circumstances surrounding the onset of the symptoms?

Understanding the context behind the answers may prompt you to offer additional assessments, and asking more questions can strengthen your partnership with the participant.

**Ask** How might this information impact your case management?

*Possible responses*

- *You know that there is more information that is needed.*
- *Perhaps the provider isn't fully aware of all the extenuating circumstances that led up to the symptoms, and this potentially new information could be shared with the provider.*

## PPT 44

**Question #6** What kind of treatment plan is the patient involved in? What is the expected outcome? What is the end goal of the treatment plan?

- What are the participant's expectations of the treatment plan?
- Did the participant feel they had a choice of treatment plans, or were they told what to do?
- If the issue is lifelong, does the participant understand that?
  - Do they see the benefit of completing the recommended treatment despite this?
  - How will the issue improve by the participant following the plan?
- What is the participant's expected outcome?

**Ask** How might a participant act if the treatment plan outcome isn't what they expected, or if they're disappointed in the results?

**Ask** How might this information impact your case management?

*Possible responses:*

- *It could let you know how motivated they are to overcome or to accept this situation will always be a part of their lives, if they believe the treatment plan will help them,*

## PPT 45

**Question #16** Is your patient making positive progress? Yes No  
Please describe the progress or lack of progress.

**Ask** What are the impacts of a positive or negative response to this question?

*Possible responses:*

- *If the participant is frustrated that they aren't making progress or improvement, they could shut down or stop participating in treatment (possible negative response).*
- *If the provider believes the participant is not doing all they can to impact the progress, the participant may have negative feelings that impact their involvement and relationship with the provider.*
- *If the participant is making progress, the positive impact could be motivation to continue or a newly held belief that they can do it.*

**Ask** How might this information impact your case management?

*Possible responses:*

- *It might be a sign that you we need to pivot for the original plan and find a new direction.*
- *Perhaps the participant wants to focus on or tackle something else for a while.*

## ☀ PPT 46

**Question #17** Are the patient's impairments likely to produce 'bad' days? Yes No  
If yes, on the average, how often do you anticipate that your patient's impairments would become acute so that the patient would be absent from work and/or other W-2 activities?

Once per month or less

Over twice per month

About twice per month

More than 3 times per month

**Ask** How might you adjust your case management practices to account for participants' 'bad' days?

*Possible responses:*

- *Provide options and flexibility for making up appointments/activities.*
- *Discuss any patterns on when 'bad' days occur (e.g., always Mondays, always in the mornings, etc.).*
- *Talk about what triggers 'bad' days or 'good' days.*
- *Focus on what they can do on the 'good' days.*

## ☀ PPT 47

**Question #20** Identify any of the following that your patient is likely to experience:

- Low tolerance for frustration
- Difficulty maintaining activities of daily living
- Difficulty communicating his/her needs
- Difficulty with decision making
- Difficulty following instructions
- Difficulty following through on agreed actions
- Inability to work with children
- Panic attacks
- Difficulty working around other people
- Difficulty with reality interpretation
- Difficulty controlling anger appropriately
- Difficulty being in unfamiliar environment
- Socially inappropriate responses to situations
- Difficulty with impulse control
- Seizures

- Difficulty maintaining concentration.
- Difficulty engaging in complex tasks that require judgment.
- Other: \_\_

**Ask** How might these difficulties impact your case management practices?

*Possible responses:*

- *Offer/provide accommodations during appointments.*
- *Approach the participant differently with feedback.*
- *Shorter, more frequent check-ins.*
- *Offer additional assessments.*

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## Conclusion

### PPT (Mute)

Today, we have woven BEST into how we use various assessment information we gather from different sources. We've spotlighted a few assessments: Standardized Educational Assessment, Career Assessment, and the Informal Assessment Inventory. We spent time throughout the day working with scenarios and applying BEST to our case management practices.

Before we leave, I want everyone to stand up. Think of all the great ideas you have shared with each other today. Does any one idea really stand out to you? In a few minutes, we would like each of you to share at least one take away from our time together. After you have shared, you can sit down.

We value your feedback, so please take a moment to complete the evaluation, if you haven't already.

## Appendix A: Chloe's Additional Information

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### Different Career Path

Chloe doesn't want to be a CNA anymore. She says that she gets attached to the residents, and it is too hard when they pass. Chloe took a free online career assessment a few weeks ago and brought in her results. She wants to know why these results are different than her last results.

### Summary of Career Test from 123test.com:

Personality Type – Artistic, Social

#### Suggested Jobs:

- Actor/Actress
- Child day care worker
- Hairdresser
- Child care worker
- Nanny
- Gardener

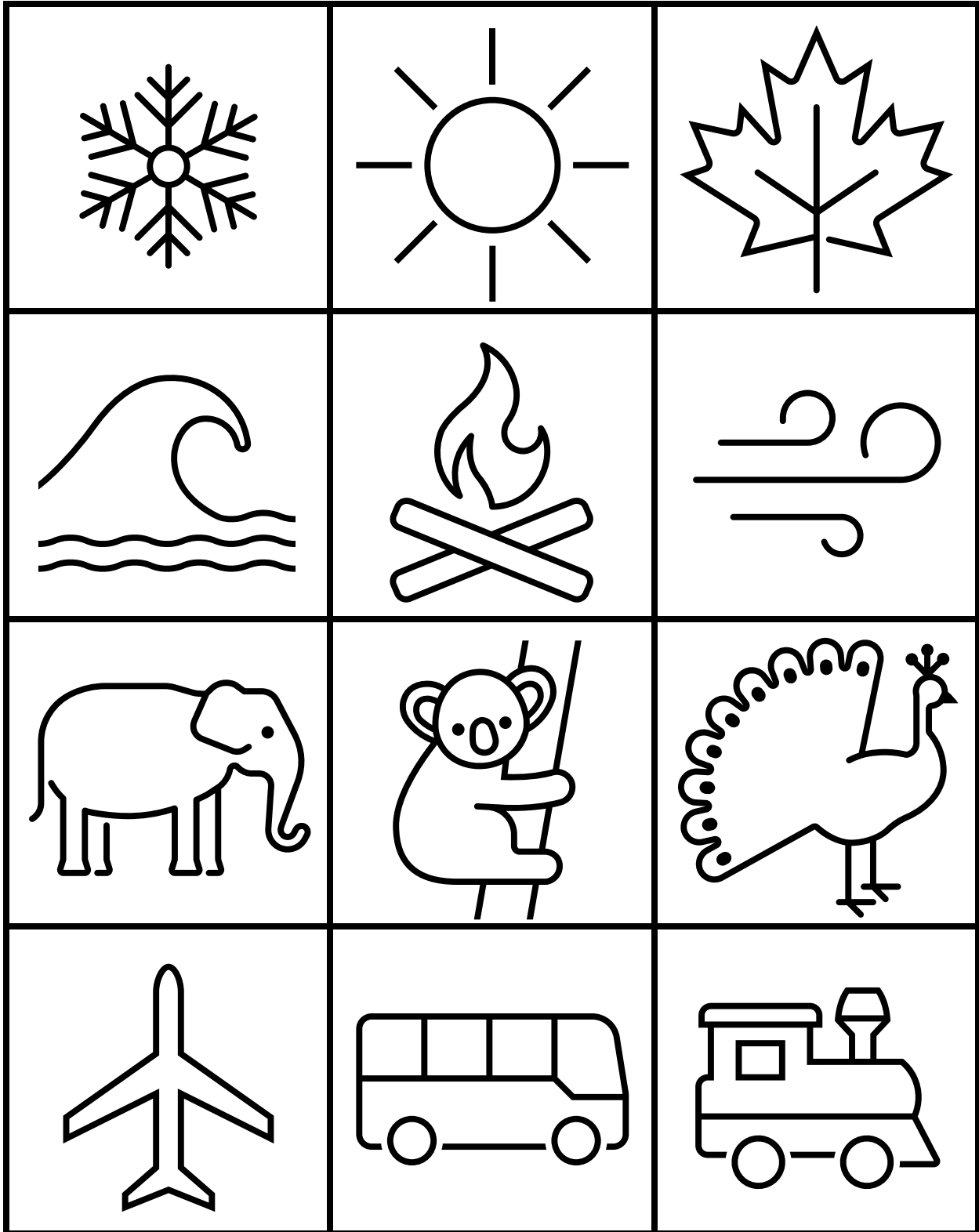
#### Top 5 Core Skills:

1. Demonstrate awareness of health risks
2. Advise others
3. Adapt to change
4. Work in teams
5. Solve problems

### Child's Upcoming School Break

Chloe reports that her six-year-old daughter, Shannon, was recently diagnosed with Oppositional Defiant Disorder (ODD). Shannon has frequent temper tantrums and usually refuses to listen to adults. She was kicked out of daycare after throwing a toy at one of the workers and injuring them. Chloe has been trying to find a new daycare facility, but hasn't had any luck. She doesn't know what she's going to do when Shannon goes on school break in a few weeks.

Appendix B: Spotlight Materials



**Appendix C: Career Assessments**

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# **WOWI Confidential Report**

Pages 22-26 in your Participant Guide.

# **WOWI Career Report**

Pages 27-30 in your Participant Guide.

# **Xyte: Practical Cognofile**

Pages 31-35 in your Participant Guide.



# WOWI CONFIDENTIAL REPORT

## CAREER TRAINING POTENTIALS

Motivation to develop aptitudes significantly beyond their current performance level depends on whether they can make a clear connection between improving performance and appealing future education and career opportunities.

### VERBAL

Ability to read and comprehend words.

#### COMPETITIVENESS

This score is below average compared to other people who have a high school diploma or equivalent. They will almost certainly need to improve their vocabulary to be competitive in obtaining a desirable job.

Raw Score: 22	
Population	Same Education
Above Average	Above Average
High Average	High Average
Average	Average
Low Average	Low Average
Below Average	Below Average

#### CONSIDERATION

Factors such as learning disorders, social environment and second language acquisition can cause delays in developing verbal abilities.

### NUMERICAL

Ability to manipulate the language of numbers.

#### VALIDITY

The score is below 10. They may have randomly answered questions or genuinely did not know the correct answers. First, determine if this is a valid score.

Raw Score: 4	
Population	Same Education
Above Average	Above Average
High Average	High Average
Average	Average
Low Average	Low Average
Below Average	Below Average

If the score is invalid, they may want to reconsider taking the assessment.

If the score is valid, they have sub-7<sup>th</sup> grade level in this area.

## ABSTRACTIONS

Potential in the area of figuring out problems through a logical procedure.

### COMPETITIVENESS

This score is below average. They will almost certainly need to improve their critical thinking skills to be competitive in obtaining a desirable job.

Raw Score: 16

Population	Same Education
Above Average	Above Average
High Average	High Average
Average	Average
Low Average	Low Average
Below Average	Below Average

### PROBLEM SOLVING

They probably find using formal rules of logic and reasoning unpleasant, and more likely prefer thinking about how to solve practical and technical problems.

## SPATIAL-FORM

Ability to visualize and think in three dimensions.

### COMPETITIVENESS

This score is on the high range. They probably are able to visualize some aspects of two-dimensional images and objects in three dimensions. They are also likely to require the aid of measurement instruments to accurately estimate size, space, distance, and volume.

Raw Score: 32

Population	Same Education
Above Average	Above Average
High Average	High Average
Average	Average
Low Average	Low Average
Below Average	Below Average

## MECHANICAL/ELECTRICAL

Potential to construct, operate, and repair machinery and understand physical forces.

### COMPETITIVENESS

This score is below average. They will almost certainly need to increase their knowledge of mechanical and electrical systems to be competitive for jobs.

Raw Score: 12

Population	Same Education
Above Average	Above Average
High Average	High Average
Average	Average
Low Average	Low Average
Below Average	Below Average

### TECHNOLOGY

They probably like user-friendly technology and prefer to have a technician fix machines when they break down, instead of attempting to fix it themselves.

## ORGANIZING SKILL

Potential to perceive and utilize language and numbers in a specified way.

### COMPETITIVENESS

This score is below average. They will almost certainly need to improve their ability to alphabetically and numerically organize information in meaningful ways.

Raw Score: 20

Population	Same Education
Above Average	Above Average
High Average	High Average
Average	Average
Low Average	Low Average
Below Average	Below Average

### POTENTIAL

It is likely they find learning the rules and process of organizing information unpleasant.

### CONSIDERATION

Improving in this area can significantly enhance their communication skills.

## JOB SATISFACTION INDICATORS

This section helps you discover what job-related personality traits they prefer to use.

### VERSATILE

The number of tasks/projects a person wants to have going on at any one point in time.

Raw Score: 42

Flexible Strong



### REPETITIVE WORK

An individual's preferred task cycling rate.

Raw Score: 42

Flexible Strong



### WHAT IT INDICATES

This score indicates they enjoy lots of variety and change and repetitive work. Ideally, they would like to spend half of their workday doing varied tasks and the other half doing more repetitive work.

### SPECIFIC INSTRUCTIONS

How much one likes following rules, regulations, procedures, protocol, recipes, blueprints, directions, etc.

Raw Score: 14

Flexible Strong



### WHAT IT INDICATES

This score indicates they do not mind working under specific instructions, but do not want to have a manager or supervisor always checking their work.

**DOMINANT**

Raw Score: 14

The extent to which a person likes to control, direct, organize, and be responsible for their own work.

Flexible

Strong

**WHAT IT INDICATES**

This score indicates they do not care whether or not they have opportunities to plan, control, or direct the work of others, or to be self-directing or independent on the job. A job that strikes a balance between the two will give them the most satisfaction.

**GREGARIOUS**

Raw Score: 28

The extent to which one finds people facilitative to a positive work environment

Flexible

Strong

**ISOLATIVE**

Raw Score: 21

Extent to which one needs to regulate one's privacy.

Flexible

Strong

**WHAT IT INDICATES**

This score indicates they strongly prefer working with people, but do not mind working alone for some of the day. They will want to avoid jobs requiring more than an hour or two of work in isolation on most days.

**INFLUENCING**

Raw Score: 28

How much a person likes to discuss, persuade, convince, and even argue with others.

Flexible

Strong

**WHAT IT INDICATES**

This score indicates they enjoy activities requiring them to influence others very much, and probably will want to incorporate influencing into whatever work they do. They should think about the circumstances in which they like to persuade others. For example, they may enjoy selling things to people, but only if customers come to them.

**SELF-CONTROLLED**

Raw Score: 28

How much one likes to procrastinate and prefers to work under pressure.

Flexible

Strong

**WHAT IT INDICATES**

This score tells us they like being self-controlled on the job and enjoy having deadlines and timetables. They like working under pressure and being responsible for work that has to be completed within a limited time frame. Jobs such as air traffic controller, mortician, emergency room technician, or secretary in a busy office might appeal to them.

**VALUATIVE**

Raw Score: 14

How much a person likes making gut level, intuitive decisions based on one's subjective impressions and feelings.

Flexible Strong



**OBJECTIVE**

Raw Score: 42

How much a person likes making decisions based on externally verifiable facts and data.

Flexible Strong



**WHAT IT INDICATES**

This score indicates they like using facts, information, and data in their work, and do not mind using hunches and intuition once they understand the facts. They will not enjoy work that requires them entirely to rely on intuition or hunches to make decisions.

**SUBJECTIVE**

Raw Score: 35

The extent to which an individual likes to express one's self as unique in the way work is done.

Flexible Strong



**WHAT IT INDICATES**

This score indicates they like being subjective, and would be unhappy if they had no creative outlet on the job. They should try to select a position that encourage creativity.

**RIGOROUS**

Raw Score: 42

The extent to which an individual likes to pay attention to detail or the bottom line and the big picture.

Flexible Strong



**WHAT IT INDICATES**

This score indicates they like being rigorous on the job. and will feel comfortable with checking their work, obeying rules and regulations, etc.

**YOUR CAREER MATCHES**

The occupations recommended to you are based on your scores in all completed sections of the inventory.

OCCUPATIONS	EDUCATION	PROGRAM OF STUDY
Cargo & Freight Agent	Job Specific Qualifications	On-the-job Training
Dispatcher	Job Specific Qualifications	On-the-job Training
Payroll Clerk	High School Diploma	On-the-job Training
Correctional Officer	High School Diploma	On-the-job Training

# WOWI CAREER REPORT

## YOUR CAREER INTERESTS

The Career Interest Activities reflect your preferences for specific, work-related tasks.

PUBLIC SERVICE	THE SCIENCES	ENGINEERING	BUSINESS	MANAGERIAL	THE ARTS
Middle	Middle	Low	Middle	High	High
MEDIA DESIGN	OFFICE & ADMIN	SALES	SERVICE	OUTDOOR	PROCESSING
High	Middle	Middle	Middle	Middle	Low
MACHINE WORK	BENCH WORK	STRUCTURAL WORK	MECHANICAL/ELECTRICAL	EXTRACTION WORK	
Low	Low	Low	Low	Low	

## WORKER FUNCTIONS

Individuals usually prefer to work with either data, people, things, or a combination of these.

You have a DATA and PEOPLE orientation.

## YOUR CAREER TRAINING POTENTIALS

Your motivation to develop aptitudes significantly beyond your current performance level depends on whether you can make a clear connection between improving performance and appealing future education and career opportunities.

<p><b>VERBAL</b> Ability to read and comprehend words.</p>	<p>It would be helpful to know how you use language to communicate. Your score suggests you learned the language necessary to communicate with friends and family. You also have the potential to increase your vocabulary and communication skills.</p>
<p><b>NUMERICAL</b> Ability to manipulate the language of numbers.</p>	<p>It is important to see where you stand with basic math. Your score suggests you don't like math or use it regularly. However, you have the potential to improve your skills.</p>
<p><b>ABSTRACTIONS</b> Figuring out problems through a logical procedure.</p>	<p>It is helpful to know if you generally prefer to solve more concrete, technical problems or those that require a more conceptual, theoretical approach. Your score suggests you generally prefer to use a mix of technical and conceptual problem solving to deal with obstacles in front of you. You may especially like learning about and applying more theoretical approaches when they can be used to solve the most difficult problems that you face.</p>
<p><b>SPATIAL-FORM</b> Ability to visualize and think in three dimensions.</p>	<p>It is helpful to know how you visualize. Your score suggests you are able to visualize some aspects of two-dimensional images and objects in three dimensions. At times, you rely on your "mind's eye" to visualize; at other times, you need the assistance of 3D computer renderings or models to help you visualize.</p>
<p><b>ORGANIZING SKILL</b> Potential to perceive and utilize language and numbers in a specified way.</p>	<p>Some people can easily organize information in a structured, logical format that is clear and understandable to others. Some people prefer to have others do it for them. Your score suggests you are good at logically organizing information in a format to be understandable to others. Furthermore, you are probably good at note taking, writing reports, and editing papers.</p>

## YOUR JOB SATISFACTION INDICATORS

An occupation that matches your personality and work style is likely to make you feel more comfortable and engaged, which leads to greater job satisfaction.

<p><b>VERSATILE &amp; REPETITIVE WORK</b> How many projects do you want to have going on at any one point in time?</p>	<p>Variety is the spice of life for people like you. You clearly prefer being versatile on the job, but can handle a little repetition when necessary. Your ideal work environment will have structure, guidelines and boundaries, but also flexibility within those boundaries.</p>
<p><b>SPECIFIC INSTRUCTIONS</b> Do you like working under clear policies, procedures, guidelines, and supervision?</p>	<p>You understand the need for policies and procedures, you respect their importance, and take pride in tailoring your work accordingly. This is a very valuable trait in the workplace. Your ideal career environment will have clearly delineated policies and knowledgeable managers in the chain of command that you can consult when needed.</p>
<p><b>DOMINANT</b> Do you like being resourceful, independent, self-directed?</p>	<p>You would enjoy occupations in which you plan, direct, and control the work of others, or in which you are independent, self-motivated, and resourceful. You should avoid jobs where you can never plan your own work or where you would never have the opportunity to supervisor or manage others.</p>
<p><b>GREGARIOUS &amp; ISOLATIVE</b> Do you find that working with people creates a positive work environment?</p>	<p>You have no preference for working with people or for working alone during the course of the workday. You would be most comfortable working with others part of the day and working alone the rest of the day. You should avoid positions that demand you work either exclusively with people or exclusively alone.</p>
<p><b>INFLUENCING</b> Do you like to discuss, persuade, convince, or even argue with others?</p>	<p>When it comes to conflict and debate on the job, you pick and choose which battles to fight. When you disagree with a decision, statement, or policy, if it's really no big deal, you can easily let it slide. You should probably avoid high-conflict or ultra-competitive environments.</p>
<p><b>SELF-CONTROLLED</b> Do you like working in high stress situations?</p>	<p>You can handle occasional crises and deadlines on the job, but you also need periods of down time and quiet in which to recover. High-stress or high-risk jobs might be a little too much to suit your style. Even less obvious stress such as a constant stream of disgruntled customers also might push you to the limit. Look for balance and avoid extremes.</p>



**VALUATIVE & OBJECTIVE**

How do you like to make decisions?

You have no preference for being intuitive and using hunches or working with data and facts. You would probably enjoy a position that lets you do both.

**SUBJECTIVE**

Do you like to express yourself creatively through your work?

You do not feel the need to express yourself in your work, but will not be opposed to being creative if your position demands it of you occasionally. You probably find it difficult to come up with a constant flow of creative ideas, but you will feel just as frustrated if you never are asked to use your creativity or imagination.

**RIGORUS**

Do you like to pay attention to the small details or the big picture?

You like being rigorous on the job, and will feel comfortable with checking your work and following rules and regulations. If you find yourself in a job where rigorousness is not valued, you may discover that your co-workers consider you to be overly meticulous or rigid.

**YOUR CAREER MATCHES**

The occupations recommended to you are based on your scores in all completed sections of the inventory.

OCCUPATIONS	EDUCATION	PROGRAM OF STUDY
Umpire & Referee	Job Specific Qualifications	On-the-job Training
Singer	Job Specific Qualifications	Music Theory
Athlete & Sport Competitor	High School Diploma	On-the-job Training
Floral Designer	High School Diploma	Floral Design
Desktop Publisher	High School Diploma or Bachelor's Degree	Desktop Publishing
Broadcast Technician	Associate's or Bachelor's Degree	Broadcast Technology
Graphic Designer	Associate's or Bachelor's Degree	Graphic Design

# Xyte: PRACTICAL COGNOFILE

## **Work Behaviors**

***The work behaviors that come naturally are the real assets that you bring to your job and make you a valuable employee.***

**Typical professions:** Mid-management administration, market analyst, sales, securities, statistician, craftsman, masseur, sculptor, construction worker, and efficient general manager.

**Work mode and behavior:** This participant is a holder of tools that uses their hands with deft ability.

**Drive behavior:** They explore things in the world around them while developing a holistic sense.

**Drive to produce:** They think efficiently while their hands deal with tangible things.

**Response to measurable goals:** They respond to goals set by others.

**Competitiveness:** They tend to be very competitive and want to win for the sake of winning.

**Service-orientation:** They enjoy doing things for others one-on-one.

**Team player / leader:** They make good team players and leaders of small groups.

**Idealism:** This participant represents realists, based on facts.

**Independence:** They can be independent thinkers, but need to have others around to carry a project through to completion.

**Confidence:** They are on the shy side and need to have a few successes to build their confidence.

**Dependability:** They are dependable and will deliver.

**Punctuality:** They are usually on time but have a more relaxed attitude about time, which may cause some delays.

**Commitment to delivery of task/project:** They will commit to a project but the task may not get accomplished on time.

**Commitment to training others:** They believe in training others, but do not have great people skills.

**Commitment to self-renewal:** They do not mind learning new things but with their relaxed attitude, self-renewal may not be tops on their list.

**Change:** They see things in a larger context and although do not like major changes, they understand the need for minor changes.

**Flexibility:** They are flexible and try to work with others even though they do not understand peoples' emotions well.

**Adaptability:** They adapt well with their relaxed attitude.

**Time management:** They like to be efficient with their time and look for ways to direct others for efficient means.

**Career goals:** Their relaxed attitude prevents them from reaching lofty goals but they are often found in middle management.

**Competency** is investigating and being practical with hands.

**Talent** is organizing and prioritizing things.

## ***Work Environment***

***The ideal work environment rarely exists. We have to adapt ourselves to each situation. Satisfying some of our preferences will reduce frustration and stress.***

### **As a Practical**

- You dislike a structured work environment
- You dislike responsibilities
- You like to work on your own and know what is expected of you
- You like routine work
- You do not plan ahead well
- You think about real and physical things
- You generally keep a messy environment
- You like to experience things
- You like a loose management style

## ***Management Behavior***

***Understanding the various behavioral actions of a cognofile is important in understanding and leading others.***

**Delegation:** They are great delegators of tasks to others.

**Decision-making:** This cognofile is considered to be adequate, but not great, decision-makers, and like others to assist or get a consensus of opinions.

**Discipline:** Practical cognofile people are not good disciplinarians, as they do not have a good understanding of people and their motivations.

**Evaluation of performance:** Given an evaluation tool, they will use it to make a performance evaluation, which will probably be focused on efficiency.

**Education:** They believe in education and will assist others in receiving proper training.

**Communication:** They are friendly and like to chat, but are not considered great communicators. They are difficult to get to know because they are shy, quiet, and not outspoken.

**Motivation of others:** They establish goals for others and delegate to others quite well. They have difficulty understanding the emotions and motivations of others.

**Development of people:** They like to see others succeed and will assist in developing others.

## ***Keys to Managing and Motivating***

***As an employee, you need to understand what motivates you to do your best.***

### **The following are keys for managing a Practical:**

- Assist them in developing a detailed work plan
- Provide some flexibility at work
- Keep them on task as they do not drive themselves
- Remind them that punctuality is important in business
- Ask for their opinions
- Allow time for exploring and trying ideas
- Minimize detailed paper work
- Assist with budgeting to organize expenses
- Keep them focused on work activities
- Assist in setting priorities
- Assist with teamwork skills if necessary
- Encourage verbal participation in meetings
- Permit them to work alone and then report to the group

### **The following are keys to motivating a Practical:**

- They like to curiously explore to understand things
- They like doing practical things with hands
- They like to organize things
- They like to use their hands
- They like to touch and experience
- They like to deal with things
- They like to position with hands and are dexterous
- They like to explore things in the community
- They like small group activities
- They like to do things for themselves by themselves

## ***Teaching and Learning Behaviors***

**Input senses:** Learning for this participant is through fine motor skills of hand contact or touch and taste. In the process they are taking in visual patterns and data.

**Input functions:** These physical sensations are connected into single concepts of past experiences that involve thinking and observing features and patterns that they sort with logic.

**Output senses:** They have excellent coordination of hand, eye, and mind.

**Output functions:** This is cyclical process in which they observe a position or feature, which the mind recognizes, and tells the hand with dexterity to move, and then the cyclical process continues, in rapid succession.

**Undeveloped behavior:** Their major disability is in the hearing area. They have difficulty with hearing and clarifying content from people. They have difficulty developing plausible strategies and plans for the future. They do not like puzzles or developing more than one possible solution.

## ***Approach & Skill Behaviors***

***These behaviors determine your attitude and the way that you accomplish work.***

**Thinking behavior:** This participant thinks through things in a logical and pragmatic manner and likes to be efficient with effort, time, and actions.

**Decision-making:** They are capable of making prudent decisions given all of the data, but rely on others' opinions.

**Speed:** They are fairly efficient and will make decisions on a timely basis.

**Accuracy:** They are not extremely precise, but think whatever is reasonable is good enough.

**Ability to prioritize/task list:** They are quite able to prioritize, and it is helpful if they use a list as a manager.

**Organization:** They are efficient organizers, but not extremely precise.

**Full range informational gathering techniques:** They are mainly observers of information, but have some capability of digging out hard to find data.

**Methodical hypothesis formation and testing:** This participant is capable of some formulating with data given, but are not known to be overly scientific.

**Self-appraisal:** They will do a self-appraisal but do not feel the necessity to act on it immediately.

**Initiation of continuous improvement:** They are not inclined to have a continuous improvement attitude, but are very willing to learn things along the way.

**Encouragement of new ideas:** They like new ideas and are willing to explore them.

**Skill at trouble-shooting:** They are capable of finding and solving small to medium scale problems, especially if limited to practical applications.

**Acting behavior:** They are always practical and down to earth.

**Interaction behavior:** They understand the gray areas and tend to be quiet and shy.

**Disposition behavior:** They like to explore ideas from a practical viewpoint. Sometimes they can be a bit mischievous.

## ***Perception***

***To balance ourselves and grow with increased wisdom, we need to understand how others perceive us.***

As a Practical, you probably see yourself as being:

- Curious
- Agreeable
- Conservative
- Good listener
- Passive
- Steady
- Relaxed
- Patient

Other people of different cognofiles may see you as being:

- Hesitant
- Anti-social
- Low-key
- Not punctual
- Uncaring
- Indecisive
- Mild
- Meek

### ***Interpersonal & Team Behaviors***

***This area evaluates how a person influences, interacts, and gets along with others.***

**Attention to training:** This participant understands the need for training and will suggest it to others when it is appropriate.

**Attention to coaching:** They are not great coaches, but will spend time and effort to educate others.

**Satisfaction in growing subordinates:** They like to see others succeed, and they assist others to grow.

**Contribution and sharing in team development:** They understand the need for teamwork, and it also assists them in their decision-making. They will contribute to the team's success.

**Ability to be straightforward and direct:** They usually are straightforward, although they may talk around a subject using anecdotes.

**Communication skills:** They are friendly communicators, yet need to be more empathetic with other peoples' emotions.

**Public speaking:** They tend to be shy and quiet, which prevents them being comfortable speaking to a large group. In small groups, they can do quite well with a little confidence.

**Conversational skills:** They can be shy, but will chat about technical subjects or things; they do not like to discuss people problems.

**Listening skills:** They are not good listeners, as they have difficulty clarifying what is said.

**Integration of human needs and business needs:** They will put business needs ahead of personal or human needs because they understand why business has to come first.

**Stimulation of enthusiasm:** Since they are not demonstrative themselves, they have a difficult time demonstrating or stimulating others.

**Utilization of incentives and praise:** If an incentive system is in place, they will participate in the system. They give out praise sparingly.

**Skills in listening and identifying motivations:** They do not listen well or clarify details from discussions.

**Outgoing versus inwardness:** Their shyness prevents them from being outgoing, but they learn from experience how to compensate somewhat.

**Promotion of positive relationships:** They are pragmatic and know that they need positive relationships around the office to be efficient and to be good managers.

**Openness to criticism:** They are open to criticism, but it should be on their work and not on them personally.

**Personal goals:** They like to explore places and things.

**Family goals:** They believe in family structure and want to support the family and provide for their needs.

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## Appendix D: Impact of Multiple Assessments Materials

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### Informal Assessment Summary

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Korie is an ongoing participant. She has been in and out of the W-2 program for five years. Korie has two children: Ruby (five) and Cole (two). Here is a summary of her informal assessment.

#### Work History

- Transcriptionist/office experience
  - Enjoys and wants to stay in this field
- Let go three months ago due to calling in too many times due to barriers
- Wants to get back to work as soon as possible

#### Education

- Has high school diploma
- Interested in attending tech school for human resources assistant certificate

#### Housing

- Renting, not at risk of eviction
  - Concerned about cost; referred to housing assistance program

#### Transportation

- Walks and/or borrows a car
  - Has driver's license
  - Car in need of repair

#### Barriers

- Severe wrist pain
  - Doctor said might be Carpal Tunnel Syndrome and referred to specialist
    - Never followed through with specialist
    - Provided the Medical Examination and Capacity form, but never got it back
- Domestic Violence
  - Left situation six months ago with help from local Domestic Violence program

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**Career Assessment Summary**

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## Work Personality:

- Conventional – like to work with data, carry out details, and follow through on orders
- Social – like to work with people and solve problems through discussion
- Enterprising – like to lead, manage, and persuade people

## Skills:

- Keep accurate records
- Operate computers
- Lead meetings
- Plan activities
- Convince others

## Potentials Jobs:

- Clerk
- Secretary
- Customer Service Representative
- Administrative Manager
- Human Resources Assistant
- Loan Officer



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**Medical Capacity and Examination Summary**

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Korie has Carpal Tunnel Syndrome. She needs surgery on both wrists, and her first surgery is scheduled for one month from today. Korie has limitations before and after surgery.

Prior to Surgery:

- Limit hand use when possible
- Wear wrist splints while sleeping

First Two Week After Surgery:

- No lifting more than 2 lbs.
- Limit hand use when possible
- No driving
- Keep fingers moving
  - Will provide at-home hand exercises upon discharge
- Avoid repetitive activities
  - Increase activity as pain allows

Korie will have a post-op appointment two weeks after surgery with her doctor to evaluate progress and adjust limitations. Based on progress, surgery on her other wrist will be scheduled three to five weeks later.

---

**Mental Health Report Summary**

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Korie meets with a counselor weekly. She has anxiety, depression, and Post-Traumatic Stress from Domestic Violence.

Her condition is not getting better. The following symptoms have gotten worse in the last two months:

- Irritability – Korie has frequent outbursts. She was asked to leave her last appointment because of an outburst.
- Insomnia – Korie reports nightmares wake her up. She gets an average of two to four hours of sleep a night.
- Reduced Concentration – Korie zones out when working on one task for more than 30 minutes.

As a result of the recent Domestic Violence, Korie also has low self-esteem. She blames herself for choosing “bad guys” and not leaving sooner. She worries that she is a bad mom because her children witnessed the violence against her.

Prescribed medication, which has the following side effects:

- Fatigue
- Mood swings
- Decreased motivation

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**Vocational Evaluation Summary**

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You referred Korie to a vocational evaluation based on your observations and feedback from worksite supervisor and workshop facilitator regarding her difficulty understanding directions and focusing.

**Additional Background Information:**

- Diagnosed with ADHD in high school
  - Received extra help during homeroom and study hall
- Fired for more than just medical reasons
  - Reports had poor attendance and could not focus, which lowered performance

**Results:**

- Has issues in social settings and relationships from history of abuse
- Cognitive abilities low
- Does not like taking medication due to side effects
- Does well with small rewards and positive encouragement
- Needs to focus on social skills before returning to unsubsidized work
- Recommends:
  - Support group for Domestic Violence
  - Accommodations (flexible schedule, limit distractions, quiet environment, task separation, and written instructions)

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**Informal Assessment Inventory Summary**

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**Personal strengths, interests, and goals:**

- Excellent computer skills
- Good communication skills
- Likes to work with people and data
- Wants to find an office job

**Job Skills:**

- Typing (75 wpm)
- Customer Service

**Job Readiness:**

- Needs a job close to home due to limited transportation
- Feels like she needs help with interviews
- Frequently runs out of minutes on her phone

**Recent job search efforts:**

- Has been applying for jobs, but never gets a call back

**Current neighborhood environment and schools:**

- Doesn't feel safe where she is living
  - Apartment is cheap, but not in a good neighborhood

**Household budgeting/money management strategies:**

- Says she is good at budgeting

**Access to social supports:**

- No friends or family in the area
- Not a member of any community groups

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**Appendix E: Standardized Educational Assessments**

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# **Khadija**

Page 37 in your Participant Guide.

# **Margie**

Page 38 in your Participant Guide.

# **Lee**

Page 39 in your Participant Guide.

## Individual Profile: Khadija

Report Criteria	
ID: 0100450	State: Wisconsin
Test Name: All Tests	District: Workforce Resource
Report: All	School: Workforce Resource
Report Date: 05-01-2024	

TABE 11							
Date Tested	Content Area	Level	Test Location	Scale Score	SEM	NRS Level	MSG
05/01/2024	Reading	A	Workforce Resource	584	17	5	N
05/01/2024	Mathematics	D	Workforce Resource	512	16	3	N

Khadija is an ongoing participant. She has her High School Diploma and wants to pursue a career in Phlebotomy.

How might Khadija's TABE results impact her pursuing a career in Phlebotomy?

What next steps might you and/or Khadija need to take?

## Individual Profile: Margie

Report Criteria	
ID: 98546733	State: Wisconsin
Test Name: TABE 11 All	District: Forward Service Corporation
Report: All	School: R3 Oshkosh
Report Date: 05-01-2024	

Test Results	Test Date	Level	Number of Points		Items Attempted	Scale Score	SEM	NRS Level	MSG
			Total	Obtained					
Reading	05/01/2024	M	47	29	40	513	15	3	N
Mathematics	05/01/2024	M	39	18	35	490	14	2	N
Language	---	---	---	---	---	---	---	---	---
Writing	---	---	---	---	---	---	---	---	---

Margie is a new participant. She dropped out of high school when she was 16 to help support her family. Margie was hesitant to take the TABE and is not sure if she wants to get a GED.

What insights do Margie's TABE results give you?

How do Margie's results impact her ability to find and maintain employment? How would you discuss this with her?

## Individual Profile: Lee

Report Criteria	
ID: 068760089	State: Wisconsin
Test Name: All Tests	District: America Works HQ
Report: All	School: America Works of WI
Report Date: 05-01-2024	

TABE 11							
Date Tested	Content Area	Level	Test Location	Scale Score	SEM	NRS Level	MSG
05/01/2024	Reading	D	America Works	616	34	5	N
05/01/2024	Mathematics	D	America Works	550	18	4	N
05/01/2024	Language	A	America Works	591	21	5	N

TABE 11							
Date Tested	Content Area	Level	Test Location	Scale Score	SEM	NRS Level	MSG
05/01/2019	Reading	D	America Works	575+	25	4	N
05/01/2019	Mathematics	D	America Works	521	15	3	N

Lee is a returning participant. He earned his GED the last time he was in the W-2 program. Now that his kids are older, Lee wants to get a CDL. However, he is nervous that he won't pass the written test.

What was the benefit of Lee taking another Educational Needs Assessment?

How might you use these results to encourage Lee to pursue getting his CDL?

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**Appendix F: Building on Trust Activity**

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Mattie recently graduated from high school, and has a six-month old son. She worked at McDonalds until she had her son. Mattie considered going back to McDonalds, but they have only night and weekend shifts available. She can't find child care during these times, and does not know what other types of work to do. Mattie agreed to complete the Career Exploration Inventory for ideas on potential career paths.

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**Mattie's Perspective**

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Mattie shares with you that she struggled with the Career Exploration Inventory. Based on what her other Case Manager told her, she thought she would answer a few questions, and then get a list of jobs that would be a good fit and are available right now. She had only 20 minutes to complete the assessment, so she had to rush through it. Mattie also shares that she didn't know how to answer most of the questions. She felt that she had no option but to select 'Future' or 'Not Interested' for anything that she doesn't have experience or training in. Mattie doesn't know why her other Case Manager asked her to take the Career Exploration Inventory because it didn't help at all.

**Mattie's Career Exploration Inventory**

<p><b>Step 1. Identifying Your Interests</b>                  Consider the following activities and mark each one with the response that most closely describes your interest.</p>				
Study soil or rock samples				
Past	Currently	Future	No interest	X
Grow flowers or trees				
Past	Currently	Future X	No interest	
Study and follow drawings and specifications				
Past	Currently	Future	No interest X	
Perform in plays or musicals				
Past	Currently	Future X	No interest	
Write a novel or poem				
Past	Currently X	Future	No interest	
Supervise others				
Past	Currently	Future X	No interest	
Take a course in management and leadership				
Past	Currently	Future X	No interest	
Teach online courses				
Past	Currently	Future X	No interest	
Prepare course objectives and course outlines				
Past	Currently	Future X	No interest	
Prepare and use a spreadsheet				
Past	Currently	Future	No interest X	
Prepare a basic financial budget				
Past	Currently	Future	No interest X	
Conduct research on political trends				
Past	Currently	Future	No interest X	
Help with a political campaign				
Past	Currently	Future	No interest X	



Research new cures for diseases	Past	Currently	Future X	No interest
Use equipment in a laboratory	Past	Currently	Future X	No interest
Entertain friends in your home	Past	Currently	Future	No interest X
Participate in sports events	Past	Currently	Future	No interest X
Lead group counseling sessions	Past	Currently	Future X	No interest
Have others come to you for help	Past	Currently	Future X	No interest
Create and apply new technology	Past	Currently	Future	No interest X
Develop and maintain websites	Past	Currently	Future X	No interest
Watch programs about police officers	Past	Currently	Future	No interest X
Watch shows about fire prevention	Past	Currently	Future	No interest X
Install and repair electrical systems	Past	Currently	Future	No interest X
Use gauges and measuring tools	Past	Currently	Future	No interest X
Raise money for a cause	Past	Currently	Future X	No interest
Show or sell products	Past	Currently	Future X	No interest
Conduct scientific experiments	Past	Currently	Future X	No interest

Use logic or scientific thinking	Past	Currently	Future X	No interest
Drive a truck to pick up and deliver materials	Past	Currently	Future	No interest X
Drive a bus	Past	Currently	Future	No interest X
Watch pets for others	Past	Currently X	Future	No interest
Care for lawns and shrubs	Past	Currently	Future X	No interest
Operate heavy equipment	Past	Currently	Future	No interest X
Design buildings	Past	Currently	Future	No interest X
Study literature	Past	Currently	Future X	No interest
Take photos	Past	Currently	Future X	No interest
Show leadership ability	Past	Currently	Future X	No interest
Serve as an officer of a group	Past	Currently	Future	No interest X
Assign lessons and correct homework	Past	Currently	Future X	No interest
Teach your favorite subjects in small groups	Past	Currently	Future X	No interest
Quickly gather and analyze financial data	Past	Currently	Future X	No interest
Set up a physical or electronic filing system	Past	Currently	Future X	No interest

Investigate unemployment insurance fraud	Past	Currently	Future X	No interest
Design and plan elements of a city	Past	Currently	Future	No interest X
Take biology courses	Past	Currently	Future X	No interest
Care for people in a hospital	Past	Currently	Future	No interest X
Cook or bake for other people	Past	Currently	Future	No interest X
Cut or set hair	Past	Currently	Future	No interest X
Interview people to collect personal information	Past	Currently	Future X	No interest
Help clients find community resources	Past	Currently	Future X	No interest
Maintain security of computer systems	Past	Currently	Future	No interest X
Help people use computers	Past	Currently	Future X	No interest
Guard property against theft or damage	Past	Currently	Future X	No interest
Defend people in court	Past	Currently	Future X	No interest
Install mufflers on cars and trucks	Past	Currently	Future	No interest X
Set up and operate woodworking machines	Past	Currently	Future	No interest X
Develop and maintain social media sites	Past	Currently	Future X	No interest

Network to endorse an idea or product Past	Currently	Future X	No interest
Understand and express technical information Past	Currently	Future	No interest X
Use high-level mathematics Past	Currently	Future	No interest X
Operate and maintain a motorboat Past	Currently	Future	No interest X
Pilot an airplane Past	Currently	Future	No interest X
Raise animals Past	Currently	Future	No interest X
Study plants Past	Currently	Future X	No interest
Install plumbing, roofing, or electricity Past	Currently	Future X	No interest
Build things out of wood Past	Currently	Future X	No interest
Do freehand drawing Past	Currently X	Future	No interest
Write magazine or newspaper stories Past	Currently	Future X	No interest
Keep excel accounting records Past	Currently	Future	No interest X
Manage and direct others Past	Currently	Future X	No interest
Prepare, give, and correct tests Past	Currently	Future X	No interest
Plan activities for children Past	Currently	Future X	No interest

Predict financial trends	Past	Currently	Future X	No interest
Analyze stocks and other investments	Past	Currently	Future X	No interest
Manage a community service agency	Past	Currently	Future	No interest X
Inspect cars and planes	Past	Currently	Future	No interest X
Study the properties of a disease	Past	Currently	Future X	No interest
Volunteer in a hospital	Past	Currently	Future X	No interest
Plan a trip	Past	Currently	Future X	No interest
Clean house	Past	Currently	Future X	No interest
Volunteer to help disabled people	Past	Currently	Future X	No interest
Volunteer to help disabled people	Past	Currently	Future X	No interest
Help people with personal problems	Past	Currently	Future X	No interest
Develop games and/or computer programs	Past	Currently	Future	No interest X
Use the internet to gather information	Past	Currently X	Future	No interest
Fight fires	Past	Currently	Future	No interest X
Enforce laws and investigate crimes	Past	Currently	Future	No interest X

Assemble products precisely Past	Currently	Future X	No interest
Inspect, sort, weight, and count products Past	Currently	Future	No interest X
Persuade people to buy your products Past	Currently	Future X	No interest
Promote an idea or product Past	Currently	Future X	No interest
Solve problems by using facts Past	Currently	Future X	No interest
Read technical books and articles Past	Currently	Future X	No interest
Drive long distances Past	Currently	Future X	No interest
Drive an ambulance Past	Currently	Future	No interest X

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**Appendix G: Mental Health Reports**

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**Francesca**

Page 49-50 in your Participant Guide.

**Nevaeh**

Page 51-52 in your Participant Guide.

**Lily-Rose**

Page 53-54 in your Participant Guide.

Francesca

Francesca is an ongoing participant who was diagnosed with Anxiety and Depression two years ago. You’ve noticed a significant improvement in her participation over the last couple of months, and requested an updated Mental Health Report.

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Division of Family and Economic Security

WPM

**MENTAL HEALTH REPORT**

Personal information you provide may be used for secondary purposes [Privacy Law, s. 15.04 (1)(m), Wisconsin Statutes].

The provision of your Social Security Number (SSN) is mandatory under Wisconsin Statutes 49.145 (2)(k). Your SSN may be verified through computer matching programs and may be used to monitor compliance with program regulations and program management. Your SSN may be disclosed to other Federal and State Agencies for official examination. If you do not provide your social security number, your application for benefits will be denied.

Participant Name	Date of Birth	Social Security Number
Francesca Burns	01 / 01 / 1990	321-54-6789

11. When completing the chart below:

\*A “Marked” degree of limitation may arise when several activities or functions are impaired or even when only one is impaired, so long as the degree of limitation is such as to seriously interfere with the ability to function independently, appropriately and effectively.

\*\*\*“Concentration, persistence and pace” refers to ability to sustain focused attention sufficiently long to permit the timely completion of tasks commonly found in work settings. This is often evaluated in terms of frequency of errors, assistance required and/or time necessary to complete simple tasks.

\*\*\* “Repeated” refers to repeated failure to adopt to stressful circumstances such as decisions, attendance, schedules, completing tasks, interactions with others, etc., causing withdrawal from the stress or to experience decompensation or exacerbation of signs and symptoms.

FUNCTIONAL LIMITATION		DEGREE OF LIMITATION				
		None	Slight	Moderate	Marked*	Extreme
1.	Restriction of activities of daily living	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2.	Difficulties in maintaining social functioning	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3.	Deficiencies of concentration, persistence or pace resulting in failure to complete tasks in a timely manner (in work settings or elsewhere) **	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
4.	Episodes of deterioration or decompensation in work or work-like settings which cause the individual to withdraw from that situation or to experience exacerbation of signs and symptoms (which may include deterioration of adaptive behaviors)	<input type="checkbox"/>		Once or Twice <input checked="" type="checkbox"/>	Repeated*** <input type="checkbox"/>	Continual <input type="checkbox"/>



15. To determine your patient’s ability to do work-related activities on a day-to-day basis in a regular work setting, please give us your opinion – based on your examination – of how your patient’s mental/emotional capabilities are affected by the impairment(s). Consider the medical history, the chronicity of findings (or lack thereof) and the expected duration of any work-related limitations, but not your patient’s age, sex or work experience.

For each activity shown below, describe your patient’s ability to perform the activity according to the following items:

Unlimited to Very Good:	Ability to function in this area is more than satisfactory.
Good:	Ability to function in this area is limited but satisfactory.
Fair:	Ability to function in this area is seriously limited, but not precluded.
Poor or None:	No useful ability to function in this area.

	MENTAL ABILITIES AND APTITUDE NEEDED TO WORK	UNLIMITED TO VERY GOOD	GOOD	FAIR	POOR OR NONE
1.	Interact appropriately with general public		X		
2.	Understand, remember and carry out very short and simple instructions			X	
3.	Maintain attention for two-hour segment			X	
4.	Maintain regular attendance and be punctual with customary, usually strict tolerances		X		
5.	Sustain an ordinary routine without special supervision		X		
6.	Work in coordination with or proximity to others without being unduly distracted	X			
7.	Complete a normal workday and work week without interruptions from psychologically based symptoms		X		
8.	Perform at a consistent pace without an unreasonable number and length of rest		X		
9.	Accept instructions and respond appropriately to criticism from supervisors		X		
10.	Get along with co-workers or peers without unduly distracting them or exhibiting behavioral extremes	X			
11.	Respond appropriately to changes in a routine work setting	X			
12.	Deal with normal work stress		X		
13.	Be aware of normal hazards and take appropriate precautions	X			
14.	Deal with stress of semi-skilled and skilled work		X		
15.	Perform detailed or complicated tasks			X	
16.	Perform fast paced tasks (e.g., production line)			X	

What might you need to discuss with Francesca regarding her limitations? What about her abilities and aptitudes?

**Nevaeh**

Nevaeh has been enrolled in the W-2 program for six months. Her only child turns 18 at the end of the year, and she is on her final appeal for SSDI. At first, she refused your offer for a formal assessment. After a few appointments, she finally agreed to have her doctor complete a Mental Health Report. Neveah has Anxiety and PTSD from childhood trauma.

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**MENTAL HEALTH REPORT**

Personal information you provide may be used for secondary purposes [Privacy Law, s. 15.04 (1)(m), Wisconsin Statutes].

The provision of your Social Security Number (SSN) is mandatory under Wisconsin Statutes 49.145 (2)(k). Your SSN may be verified through computer matching programs and may be used to monitor compliance with program regulations and program management. Your SSN may be disclosed to other Federal and State Agencies for official examination. If you do not provide your social security number, your application for benefits will be denied.

Participant Name	Date of Birth	Social Security Number
Nevaeh Klein	01 / 01 / 1995	321-45-6789

11. When completing the chart below:

\*A "Marked" degree of limitation may arise when several activities or functions are impaired or even when only one is impaired, so long as the degree of limitation is such as to seriously interfere with the ability to function independently, appropriately and effectively.

\*\*\*"Concentration, persistence and pace" refers to ability to sustain focused attention sufficiently long to permit the timely completion of tasks commonly found in work settings. This is often evaluated in terms of frequency of errors, assistance required and/or time necessary to complete simple tasks.

\*\*\* "Repeated" refers to repeated failure to adopt to stressful circumstances such as decisions, attendance, schedules, completing tasks, interactions with others, etc., causing withdrawal from the stress or to experience decompensation or exacerbation of signs and symptoms.

FUNCTIONAL LIMITATION		DEGREE OF LIMITATION				
		None	Slight	Moderate	Marked*	Extreme
1.	Restriction of activities of daily living	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
2.	Difficulties in maintaining social functioning	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3.	Deficiencies of concentration, persistence or pace resulting in failure to complete tasks in a timely manner (in work settings or elsewhere) **	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
4.	Episodes of deterioration or decompensation in work or work-like settings which cause the individual to withdraw from that situation or to experience exacerbation of signs and symptoms (which may include deterioration of adaptive behaviors)	<input type="checkbox"/>		<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

15. To determine your patient’s ability to do work-related activities on a day-to-day basis in a regular work setting, please give us your opinion – based on your examination – of how your patient’s mental/emotional capabilities are affected by the impairment(s). Consider the medical history, the chronicity of findings (or lack thereof) and the expected duration of any work-related limitations, but not your patient’s age, sex or work experience.

For each activity shown below, describe your patient’s ability to perform the activity according to the following items:

Unlimited to Very Good:	Ability to function in this area is more than satisfactory.
Good:	Ability to function in this area is limited but satisfactory.
Fair:	Ability to function in this area is seriously limited, but not precluded.
Poor or None:	No useful ability to function in this area.

	MENTAL ABILITIES AND APTITUDE NEEDED TO WORK	UNLIMITED TO VERY GOOD	GOOD	FAIR	POOR OR NONE
1.	Interact appropriately with general public				X
2.	Understand, remember and carry out very short and simple instructions				X
3.	Maintain attention for two-hour segment			X	
4.	Maintain regular attendance and be punctual with customary, usually strict tolerances			X	
5.	Sustain an ordinary routine without special supervision				X
6.	Work in coordination with or proximity to others without being unduly distracted				X
7.	Complete a normal workday and work week without interruptions from psychologically based symptoms				X
8.	Perform at a consistent pace without an unreasonable number and length of rest				X
9.	Accept instructions and respond appropriately to criticism from supervisors			X	
10.	Get along with co-workers or peers without unduly distracting them or exhibiting behavioral extremes			X	
11.	Respond appropriately to changes in a routine work setting			X	
12.	Deal with normal work stress				X
13.	Be aware of normal hazards and take appropriate precautions		X		
14.	Deal with stress of semi-skilled and skilled work				X
15.	Perform detailed or complicated tasks			X	
16.	Perform fast paced tasks (e.g., production line)				X

How would you discuss the abilities and aptitudes section with Neveah?

**Lily-Rose**

Lily-Rose is a new participant. She applied for W-2 after losing her job due to her mental health. She was diagnosed with Depression after the deaths of several loved ones.

DEPARTMENT OF CHILDREN AND FAMILIES  
Division of Family and Economic Security

**WPM**

**MENTAL HEALTH REPORT**

Personal information you provide may be used for secondary purposes [Privacy Law, s. 15.04 (1)(m), Wisconsin Statutes].

The provision of your Social Security Number (SSN) is mandatory under Wisconsin Statutes 49.145 (2)(k). Your SSN may be verified through computer matching programs and may be used to monitor compliance with program regulations and program management. Your SSN may be disclosed to other Federal and State Agencies for official examination. If you do not provide your social security number, your application for benefits will be denied.

Participant Name	Date of Birth	Social Security Number
Lily-Rose Wilkerson	01 / 01 / 2000	123-45-6789

11. When completing the chart below:

\*A “Marked” degree of limitation may arise when several activities or functions are impaired or even when only one is impaired, so long as the degree of limitation is such as to seriously interfere with the ability to function independently, appropriately and effectively.

\*\*\*“Concentration, persistence and pace” refers to ability to sustain focused attention sufficiently long to permit the timely completion of tasks commonly found in work settings. This is often evaluated in terms of frequency of errors, assistance required and/or time necessary to complete simple tasks.

\*\*\* “Repeated” refers to repeated failure to adopt to stressful circumstances such as decisions, attendance, schedules, completing tasks, interactions with others, etc., causing withdrawal from the stress or to experience decompensation or exacerbation of signs and symptoms.

FUNCTIONAL LIMITATION		DEGREE OF LIMITATION				
		None	Slight	Moderate	Marked*	Extreme
1.	Restriction of activities of daily living	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
2.	Difficulties in maintaining social functioning	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3.	Deficiencies of concentration, persistence or pace resulting in failure to complete tasks in a timely manner (in work settings or elsewhere) **	Never	Seldom	Often	Frequent	Constant
		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
4.	Episodes of deterioration or decompensation in work or work-like settings which cause the individual to withdraw from that situation or to experience exacerbation of signs and symptoms (which may include deterioration of adaptive behaviors)	Never		Once or Twice	Repeated***	Continual
		<input type="checkbox"/>		<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

15. To determine your patient’s ability to do work-related activities on a day-to-day basis in a regular work setting, please give us your opinion – based on your examination – of how your patient’s mental/emotional capabilities are affected by the impairment(s). Consider the medical history, the chronicity of findings (or lack thereof) and the expected duration of any work-related limitations, but not your patient’s age, sex or work experience.

For each activity shown below, describe your patient’s ability to perform the activity according to the following items:

Unlimited to Very Good:	Ability to function in this area is more than satisfactory.
Good:	Ability to function in this area is limited but satisfactory.
Fair:	Ability to function in this area is seriously limited, but not precluded.
Poor or None:	No useful ability to function in this area.

	MENTAL ABILITIES AND APTITUDE NEEDED TO WORK	UNLIMITED TO VERY GOOD	GOOD	FAIR	POOR OR NONE
1.	Interact appropriately with general public		X		
2.	Understand, remember and carry out very short and simple instructions		X		
3.	Maintain attention for two-hour segment		X		
4.	Maintain regular attendance and be punctual with customary, usually strict tolerances				X
5.	Sustain an ordinary routine without special supervision				X
6.	Work in coordination with or proximity to others without being unduly distracted				X
7.	Complete a normal workday and work week without interruptions from psychologically based symptoms				X
8.	Perform at a consistent pace without an unreasonable number and length of rest				X
9.	Accept instructions and respond appropriately to criticism from supervisors				X
10.	Get along with co-workers or peers without unduly distracting them or exhibiting behavioral extremes			X	
11.	Respond appropriately to changes in a routine work setting			X	
12.	Deal with normal work stress				X
13.	Be aware of normal hazards and take appropriate precautions			X	
14.	Deal with stress of semi-skilled and skilled work				X
15.	Perform detailed or complicated tasks				X
16.	Perform fast paced tasks (e.g., production line)				X

What accommodations might Lily-Rose benefit from?