

Trainer's Notes

Working with W-2 Participants with Multiple Barriers – Virtual Classroom

Purpose

Workers engage participants with multiple barriers to reach their goals and move toward self-sufficiency.

Objectives

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

- Summarize what case management means when working with W-2 participants with multiple barriers.
 - Use assessment results to help W-2 participants with multiple barriers reach their program goals.
 - Demonstrate engagement techniques that assist W-2 participants with multiple barriers to, reach self-sufficiency.
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Materials

- Laptop and Zoom link
- Sign-in sheet
- Course evaluation link
- Participant Guide
- Working with Participants with Multiple Barriers – Virtual Classroom PPT
- Google Slides link (see below)
- Virtual die <https://freeonlinedice.com/>

Trainer Pre-Work

Prior to class, create a copy of the master Google Slides presentation for your class (<https://docs.google.com/presentation/d/1DJMB6rkLeYdydfC0EArk0Mn5HLKN296C1D3vO3OgycE/edit?usp=sharing>).

Update your copy so that each learner has one slide to work on. Double check your share settings to ensure that anyone with the link can edit it.

Prior to class, block off extra boxes on PPT 2 so there is only one box available per learner.

Create polls for the three questions in the pop quiz on TN 6.

Trainer Post-Work

After class, change the Google Slides presentation share settings to be view only.

Suggested Pace

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

Day One

30 minutes: Seasonal Check-In Set Up through Formal Assessment

5 minutes: Getting to Know You Energizer

30 minutes: Career Assessment through Seasonal Check-In

5 minutes: Break

40 minutes: Case Study: Assessment

10 minutes: Day One Closer

Day Two

30 minutes: Day Two Welcome through Goal Setting

5 minutes: Writing Name Energizer

18 minutes: SMART Goals through Seasonal Check-in

5 minutes: Break

12 minutes: Challenges and Solutions

40 minutes: Study: Goal Setting

10 minutes: Day Two Closer

Day Three

30 minutes: Day Three Opener through Accommodations

5 minutes: Accommodations Waterfall

40 minutes: Case Study: Engagement and Accommodations

5 minutes: Break

30 minutes: Challenges and Solutions through Now What?

10 minutes: Handy Information through Closing

Day One

 PPT 1

Welcome, and thank you for joining us this week. In this course, we focus on assisting participants who have multiple barriers. It can be a challenge to engage participants with multiple barriers in the W-2 program. It's our role to assist families as they work toward self-sufficiency.

Self-sufficiency may look different for different participants with multiple barriers. It's not just about full-time employment. It could mean the participant obtains part-time employment, is determined eligible for SSI or SSDI, or takes the first step toward achieving a goal. How we assist families in moving toward self-sufficiency looks different based on each family's needs and strengths.

Throughout this course, we'll discuss assessment, goal setting, and other engagement strategies. These aren't new concepts. In fact, you probably are very familiar with and skilled at implementing them. This week, we invite you to think about how you can use, modify, or adjust your current techniques to better engage participants with barriers.


Seasonal Check-In Set Up


 PPT 2

Purpose: Learners interact with other learners to network, share ideas, and strategize.

Estimated Length: 5 minutes

Directions to Trainer: Have learners type their name in one of the cells using their text annotation tool. If a learner cannot annotate, type their name in a cell for them. Take a screenshot of the slide for use later in the training. If multiple learners put their names in the same cell, move one of the names to a different cell.

Trainer Instructions to Learners: To do this, we'll give you the opportunity to network, share, and learn from your colleagues. On our screen is a table divided into four seasons: Spring, Summer, Fall, and Winter.  Type your name in one of the cells using your text annotation tool.


 Be sure to write down your season so you remember it. You'll get partnered with someone from a different season a little bit later today.

Podcast Pop Quiz PPT 3 PG 4

Purpose: To reinforce what learners learned in pre-class podcast.

Estimated Length: 5 minutes

Directions to Trainer: Open polling questions one at a time. After all learners answer, or 20 seconds pass, share the results.

Train Instructions to Learners: Before we dive into working with participants with multiple barriers, let's refresh our minds on the information we covered in the podcast you listened to prior to class with a pop quiz. When you see a poll pop up on your screen,  select your answer and submit.

True or False: Barriers can have a significant impact on participants' ability to work.
Correct Answer: True

Why are some individuals with disabilities unable to work full-time?

- Lack of interest in working
- Inability to manage disability
- Lack of employer flexibility

Correct Answer: Lack of employer flexibility

Why is empathy important when working with participants facing multiple barriers?

- It allows you to sympathize with their challenges
- It helps build a trusting relationship
- It helps you provide immediate solutions

Correct Answer: It helps build a trusting relationship

That trusting relationship you develop goes a long way in assisting participants to move forward. However, you're human, and sometimes you can feel frustrated or stuck when working with participants with multiple barriers.

Ask How do you re-focus your mindset during those challenging times to be more empathetic?

Possible Responses:

- *Don't take non-cooperation personally*
- *Continue to reevaluate to find ways participants can be successful*
- *Their success or "failure" is not your success or failure*
- *Stop and pause; stepping back can provide an opportunity to refocus and gain perspective*

In this course, we'll look at some strategies on how you can best provide case management to participants who have multiple barriers.

Note to Trainer: If the class did poorly on the pop quiz, encourage learners to re-listen to the podcast.

Working with W-2 Participants with Multiple Barriers Challenges



PPT 4


Purpose: Learners acknowledge the challenges they face in supporting and providing services to W-2 participants who have multiple barriers.

Materials: Prepared Google Slides presentation link

Estimated Length: 10 minutes

Directions to Trainer: Delete extra slides for any learners who did not attend. Then, put the link to the Google Slides presentation in the chat. Instruct learners to write down one of the challenges they face when working with W-2 participants with multiple barriers on one slide. After they record their challenge, invite them to scroll through the presentation and read each other's challenge.

Trainer Instructions to Learners: Let's take a moment to reflect on some of the experiences you've had when working with participants who are living with multiple barriers. I just put a link to a Google Slides presentation in the chat.  Click on the link to open the presentation.  Find the slide with your name on it, and record one challenge you face when working with W-2 participants who have multiple barriers. Then, delete your name.

 After you record your challenge, scroll through the other slides to read each other's challenges.

Debrief

How did it feel to see other workers experience challenges similar to yours?

Reponses will vary

We know the work you do is challenging. Let's all acknowledge that. We also know that each of you has the skills, strategies, and knowledge to assist others facing multiple barriers to overcome these challenges. Throughout the rest of the week, take the opportunity to revisit the Google Slides presentation and add solutions and strategies to the challenges. We will revisit the challenges each day.



In addition to revisiting challenges and coming up with solutions to those challenges, we will give you the opportunity to work with each other on a few scenarios. Together, you'll brainstorm ways to engage the participant based on information we provide. Today's focus is assessment, where we'll cover a few foundational concepts. Then, we will introduce you to your scenarios to review and discuss the actions you would take.

Assessment

PPT 5



PG 5

Think about when you have met with a medical provider. You want them to know your entire situation and to understand and provide you with the best, and most beneficial, recommendations and treatment.

The medical provider looks at your medical history.  Is there a pattern?  What treatments or procedures have worked for you in the past? If the provider doesn't take enough time with you, or doesn't gather enough information, they may give you a diagnosis and treatment that may not be effective, or even could have negative effects.

A medical provider uses questions, history, and assessment tools to gather information from you so that they can treat the issues. You use assessments like medical providers do, to gather relevant information so that you can provide appropriate services.

PPT 6

When you work with participants with multiple barriers, it is critical to  look at a wide variety of different assessments.  Be transparent with the participant as you gather assessment information. They need to know why you are asking for this information, how the information impacts them and their case, and who is going to see and review this information.

You need information. Assessments provide that information.

Ask Which W-2 assessment, or assessments, might be particularly helpful when working with participants with multiple barriers?

Possible Responses: Informal assessment, formal assessment, career assessment

Ask Why might those assessments be helpful?


Possible Responses:


- *Learn what accommodations may be needed*
- *Get an overview of what is happening with the participant*
- *Discover strengths the participant has*
- *Find out potential career paths that work within a participant's abilities*


We'll talk more about informal, formal, and career assessments today, and how to use those assessments to assist participants with multiple barriers. Up first is informal assessment.

Informal Assessment

PPT 7

Informal assessments provide an overview of the participant's  current situation. Through the informal assessment, you create a plan of action with a participant to navigate their barriers, along with strategies to help identify accommodations and services to assist them with completing W-2 activities that move them toward their goals.

Keep in mind, informal assessment needs to  go beyond just completing a driver flow. Informal assessment also means considering your observations and conversations with the participant about their current situation, and then making needed adjustments.

Informal assessment is an  ongoing process. W-2 Policy Manual 5.2 explains this further. This is an important concept to remember when working with participants with multiple barriers. Their situation may change daily. You must document these changes. Be sure to document both your actions and what led to those actions in PIN Comments. This is required per W-2 Policy Manual 4.3.3.

Ask In what ways have you succeeded in using informal assessment information to engage a participant with barriers in moving forward?

Possible Responses:



- *It has identified the need for a formal assessment*
- *We've been able to uncover a participant's motivation*
- *It's identified possibilities and opportunities for supports and other resources*

Next, let's talk about formal assessment.

Formal Assessment

☀ PPT 8


📄 PG 6

A formal assessment helps  establish the disability, its effects on participation and employment, and any supportive assistance the participant needs. This information also establishes the  participant's capabilities. When participants have multiple barriers, you may need to obtain multiple formal assessments.

Ask Who has obtained multiple formal assessments for a participant? Give me a thumbs up reaction if you have, or a thumbs down reaction if you haven't.

Note to Trainer: Encourage a few volunteers to share their experience, good or bad, in obtaining multiple formal assessments. Depending on the examples and experience, you may be able to highlight the importance of obtaining a Request for Information (ROI) to speak with the provider about getting additional information. This is critical when information is missing, or 0 hours of participation is indicated.

When you obtain multiple formal assessments, they may tell different parts of the same story, or a different story altogether. Your job is to consider all the information you have available to you to assist the participant in engaging in activities.

While we use formal assessment to identify the severity or extent of a barrier, it also provides  insight on the accommodations the participant needs to fully participate. That is the key we want to focus on. Individuals with barriers do want to participate. It's your job to work with them to uncover and identify the accommodations or supportive services they need to participate, and work toward their path to self-sufficiency.


Remember to document how you are using the information from the formal assessment in PIN Comments, being mindful of confidential information.

Getting to Know You Energizer

☀ PPT 9


Estimated Length: 5 minutes






Directions to Trainer: Ask learners to come up with an activity they like that begins with the same letter of their first name. After they share the activity, rename them in Zoom to reflect it. Then, that learner gets to pick the next person to share. Continue until everyone has shared.

Trainer Instructions to Learners: Remember, assessment is all about getting to know the participant. Let's take a moment to get to know each other a bit more. I'd like each of you to  think about an activity you enjoy that begins with the same letter of your first name. This could be a hobby, a topic you enjoy discussing, or even a TV show you like watching. When I call on you, unmute and tell us your activity. Then, I will re-name your Zoom display name accordingly. For example, my name is XX and I like to XX, so my new Zoom display name is XX XX. After you share your name, you get to call on the next person to share.

Career Assessment

PPT 10

Of course, there is a lot more to know about participants than just their hobbies and backgrounds, and we rely on other assessments, such as career assessments, to gain this insight. Career assessments guide a participant to a  potential career path. Per W-2 Policy Manual 5.2.2, you are required to offer and should complete a career assessment with participants. Starting out, you may not develop a full career pathway with the participant. However, you and the participant can take the first step toward discovering what employment may look like for them.

 Use the information from the career assessment to  assign meaningful employment related activities,  highlight strengths,  identify training needs, and  match the individual to employment opportunities. When working with a participant with multiple barriers, this is especially important. You need to identify both aspects of jobs that the participant loves and can do, and skills a participant can use that match their interests. Although this assessment doesn't focus on the participant's barriers, it does focus on what they may want to do and the employment options that their interests and skills afford them.

W-2 Policy Manual 5.4.3 states that career assessments can be administered throughout ongoing case management. They don't need to be a "one and done."

Ask Why might it be beneficial to re-examine career assessments with participants with multiple barriers?

Possible Responses:

- *They might not have seen value in it the first time.*
- *They might not have felt they were ready for employment the first time.*
- *You may have discovered accommodations that open the doors to more employment opportunities.*

As you work with participants with multiple barriers, think about ways you can encourage them to view work as a viable option.

Seasonal Check-In PPT 11

Purpose: Learners interact with another learner to network and share ideas on how they have used formal assessment to engage a participant with multiple barriers.

Estimated Length: 3 minutes

Directions to Trainer: Partner learners with someone not in their season. If there is an uneven number, the group of three should have a learner from 3 different seasons. If there are groups of two, create the breakout rooms for a total of 2.5 minutes (2 minutes with a 30 second countdown). If there is a group of three, create the breakout rooms for a total of 3 minutes (2 minutes with a 60 second countdown). Designate a learner whose name was in the Winter or Spring quadrant as the group leader. It is not necessary to debrief this activity.

Trainer Instructions to Learners: In just a moment, you'll be put into a breakout room with someone from a different season. 🖱️ Together, discuss how you've used assessment results to engage participants with multiple barriers. 🖱️ If your name was in a Winter or Spring cell, you are the group leader. Group leaders have the job of starting the conversation. You have two and a half minutes to discuss. Group leaders, give me a thumbs up if you are ready to begin. Give me a thumbs down if there is something you need me to clarify before we begin.

Case Study: Assessment PPT 12




 PG 27 (Camila), PG 34 (Monica), PG 41 (Ramona), PG 7


Purpose: Learners identify information from assessment that can be used to develop positive steps toward engagement.

Estimated Length: 40 minutes

Directions to Trainer: Divide learners into three groups and assign each group one scenario. Schedule the breakout rooms for a total of 30 minutes (29 minutes with a 60 second countdown). Assign each trainer to one breakout room. Turn on your webcam and encourage learners to do the same. Within the breakout rooms, trainers will facilitate the review and discussion of the informal assessment, followed by the formal assessment and career assessment. Have learners identify the relevant information, including strengths and barriers, from each assessment, and how they can use the provided information to engage that participant.

After they discuss the participant, or 25 minutes have passed, have learners identify five key strategies for using assessment results to engage participants with multiple barriers. Be sure one learner from the group is ready to report out their key strategy or strategies.

Trainer Instructions to Learners: Each day, we are going to look at a case study to apply what we learn. In a moment, we are going to send you to breakout rooms with a trainer. The trainer will tell you which participant you are working with. With your group,  review the informal assessment information,  identify the relevant information, including strengths and barriers, and  discuss how you can use that information to engage the participant. Then, do the same thing with the participant's formal assessment and career assessment.

After you've reviewed your participant's assessment information, you'll work with your group to  identify five key strategies for using assessment results to engage participants with multiple barriers. You have 30 minutes to review your participant information and come up with your key strategy or strategies. **Ask** What can I clarify before we go into breakout rooms?

PPT 13

Debrief

Ask What is your top strategy or strategies for using assessment results to engage participants with multiple barriers?

Responses will vary

We'll continue working with these scenarios throughout the rest of the week.

Day One Wrap-Up

 PPT 14**Day One Closing Activity**

Purpose: Learners identify and reinforce their key takeaway from today.

Estimated Length: 10 minutes

Directions to Trainers: Ask each learner to review the sentence started on the screen and turn on their webcam. After they share their response, they can turn off their webcam. Go around the room until all learners have their webcams off.

Trainer Instructions to Learners: As we wrap up our first day together, we want to hear from you. Review the sentence starter on our screen, and turn on your webcam. When you are ready, unmute and share your response. After you've shared your response, you can turn off your webcam.



Thank you all for sharing how you plan on using assessment when working with participants with multiple barriers!

Note to Trainer: Put the Google Slides link in the chat again.

Remember, we still have outstanding challenges in our Google Slides presentation. Feel free to review the challenges and add your solutions outside of class. We'll look at them again tomorrow. Additionally, we'll focus on how you can use goal setting when working with participants with multiple barriers.

Day Two Self-Facilitated Introduction

PPT 15

Estimated Length: 15 minutes prior to beginning of class.

Directions to Trainer: Display the slide at least 15 minutes before class starts. Greet learners as they enter the class, and instruct learners to use their Text Annotation Tool to answer the question displayed on the screen. As they are answering the question of the day, engage the learners in some discussion related to their responses.

Day Two Welcome

PPT 16

Welcome to Day Two. Yesterday, we discussed using assessment as an engagement tool. Today, we are going to take all that assessment information and look at how you can use it to engage the participant in setting goals.

Assessment Revisiter

PPT 17

Purpose: Learners share what they know about assessment with the class.

Materials: A virtual die <https://freeonlinedice.com/>

Estimated Length: up to 10 minutes

Directions to Trainer: Divide learners into breakout rooms of 3-4 learners. Create the breakout rooms for a total of 4 minutes (3 minutes with a 60 second countdown). Provide the link to a virtual die in the chat. One person in each breakout room rolls the die. The number on the die corresponds to the assessment topic listed on the PPT slide. Share the PPT to the breakout rooms. The group then must share three things about that topic. Groups have four minutes to discuss their three things. After the breakout rooms end, groups return to the large group, and each group reports out. If necessary, request clarification for their responses.

Trainer Instructions to Learners: Notice, on the screen, we have six assessment topics. In just a moment, I will move you to a breakout room. One person in each group will roll a virtual die, and together the group must come up with three things you've learned or know to be true about the assessment topic for the number your group rolled. You have four minutes for this. Be prepared to share your three things with the group. The link to a virtual die is in the chat.

We know there are other assessments, in addition to those we discussed yesterday, that also can provide you and the participant information that can assist the participant moving forward.

Ask In addition to the assessments we discussed yesterday, what other types of assessments do you find helpful when working with a participant with multiple barriers?

Possible Responses:




- *Vocational – identifies daily/practical needs and capabilities*
- *Educational Needs Assessment – identifies potential educational and training needs and activities*
- *Job Readiness – helps the participant understand how their barriers and work preferences may or may not align*
- *Observations from other individuals/organizations working with the participant*

You can use assessment information to assist the participants identify their goals, activities to reach their goals, accommodations to fully participate in reaching their goals, and needed supports and services. Today, let's look at goal setting in more detail.

Goal Setting

 PPT 18

 PG 8

Use assessment results so you can work with participants to develop goals. Working with the participant on this can help them  see what they can do and  what is possible.  This may take work and time. These goals should reflect the path and steps a participant is going to take to overcome their barriers.

There are two questions in your Participant Guide. I want you to take a few minutes to read those questions and record your thoughts.

Note to Trainer: Provide approximately three minutes for learners to answer the questions independently. Then, ask learners to share what they recorded.

Ask Why might a participant with multiple barriers be hesitant to set goals or struggle with setting goals?

Possible Responses:

- *They may not have felt successful in the past, and feel they are setting themselves up for failure*
- *They've been told they can't do it*
- *They've not thought about what they can do*
- *When someone's focused on the things they can't do, it can be hard to refocus on what they can do*

- *Participants may not feel like they can accomplish a long-term goal*

PPT 19

Ask How can you help the participant handle their hesitations or struggles and assist them in setting goals? Use your text annotation tool to record your response on the screen.

Possible Responses:

- *Reassure them that their goals are their goals, not mine or the program's*
- *Ask them what their dreams/goals are, and explain how I and the W-2 program can help them work toward making that dream come true*
- *Use motivational interview techniques to draw out the participant's motivation*
- *Look at getting from step A to step B, not step A to step Z*

Which of these strategies sparks your interest? Write them down in your Participant Guide.

Goal Setting Tools

PPT 20

PG 9

How do we develop goals with participants who have multiple barriers? Let's look at that.

Dr. Martin Luther King, Jr. said, "You don't have to see the whole staircase, just take the first step."

Ask What does that mean to you?

Possible Responses:

- *Big things are possible by completing one small step at a time*
- *Just look at taking the first step; don't focus on accomplishing the whole thing at once*
- *Don't focus on the whole thing; it's too daunting*

Taking one step at a time helps us accomplish a goal that at first can seem impossible or insurmountable.

Ask How can you apply that idea to goal setting with participants?

Possible Responses:

- *We need to know the whole picture, but look at setting one small goal at a time*
- *Ask them what that first step is, and what they want that to look like*

As we mentioned, often goals can seem insurmountable. Using small steps to break down goals into smaller goals, and those goals into smaller steps, can help set up the participant for success. Sometimes, it may seem like the participant is taking a step backward, not forward. Those steps are still a part of the participant's journey to success. They are learning moments along the path to accomplishing their goal.

John Hancock Energizer




☀ PPT 21

📄 PG 50 (Appendix E)

Estimated Length: 5 minutes

Materials: Pen and blank sheet in PG.

Directions to Trainer: Learners draw a straight line in the middle of a blank piece of paper from top to bottom. Give learners 30 seconds to sign their name with their left hand on the left side of the paper. Then give learners 30 seconds to sign their name with their right hand on the right side of the paper.

Trainer Instructions to Learners: In your Participant Guide,  draw a straight line down the middle of the page from top to bottom.  On the left side, sign your complete name as legibly as possible in 30 seconds using your left hand. You can write your name as many times as you would like to get it as legible as you can within the 30 seconds. [*Pause 30 seconds.*]  Now, using your right hand, sign your complete name as legibly as you can on the right side of paper in 30 seconds. Again, you can write your name as many times as you would like to get it as legible as you can within the 30 seconds.

Practice makes perfect, regardless of which column you feel is your best work. When you first were starting to learn to write your name, it was work. You started by learning each letter, sounding it out, and writing it over and over. It took practice.


The same can be said for making change and meeting goals. We need to take it one step at a time. And, just like when we started to write our name, it may look messy at times. We need to practice. We need to break it down and keep trying.

SMART Goals


 PPT 22 PG 9


The SMART goals model provides a framework for goal setting. These goals build on small incremental steps. This allows us to celebrate with the participants their small victories and build momentum and motivation moving forward.

Before we move forward, let's do a quick recap. SMART stands for:

 Specific - Specific means the goal should be clear and detailed so that both you and the participant understand the intent of the goal.

 Measurable - Measurable is identifying what accomplishing the goal looks like.

 Attainable - For the goal to be attainable, the participant needs the knowledge, skill, and aptitude to reach their goal.

 Relevant - Relevant means the goal is important to the participant.

 Time-bound - Time-bound is setting a timeline for achieving the goal.

 PG 10

In your Participant Guide, record at least three reasons why using the SMART goal method is advantageous when working with W-2 participants with multiple barriers. I'll give you three minutes to come up with your list.

Let's flood the chat. Type the reasons you came up with in the chat.

Possible Responses:

- *SMART goals are concrete, and everyone knows what the participant is working toward.*
- *The participant has a clearer road map to success.*

 PG 11

Using a SMART goal method can help break down the goal into smaller steps. So, what might this look like?

Let's say Michael is former employee at an equipment manufacturer. He worked on one of the shop's production lines. He lost his job due to a physical barrier resulting from an injury at work.

Let's look at an example of a SMART goal. **Review** Goal A in your Participant Guide.

That's a great goal. But, for someone with multiple barriers, that's a big goal that can become overwhelming. We want to set participants up for success.

How can the goal be broken down into smaller steps? **Review** Goal B in your Participant Guide.

Ask What did you like better about the second goal?

Possible Responses:

- *Smaller steps*
- *More opportunity for small successes along the way, which can lead to continued motivation*
- *The second goal is more tangible/attainable*
- *Timeframes that can take into account a participant's multiple barriers*

Goal Steps don't need to happen simultaneously. In fact, you can type "Step 1" directly into the Goal Step field in WWP. No matter what goal you are working on with the participant, SMART goals and small actionable steps are useful tools in making the goal manageable and attainable.

Seasonal Check-In



 PPT 23

 PG 12

Purpose: Learners interact with another learner to network and share ideas how they have used formal assessment to engage a participate with multiple barriers.

Estimated Length: 3 minutes

Directions to Trainer: Partner learners with someone not in their season. If there is an uneven number, the group of three should have a learner from 3 different seasons. If there are groups of two, create the breakout rooms for a total of 2.5 minutes (2 minutes with a 30 second countdown). If there is a group of three, create the breakout rooms for a total of 3 minutes (2 minutes with a 60 second countdown). The learner whose name was in the Summer or Fall cell will be the leader of their group. It is not necessary to debrief this activity.

Trainer Instructions to Learners: In just a moment, you'll be put into a breakout room with someone from a different season.  Together, discuss how you plan to use goal setting to engage participants with multiple barriers. I've assigned a group leader to start the conversation.  If your name was in the Summer or Fall cell, you are the group leader. You have two and a half minutes to discuss. Group leaders, give me a thumbs up if you are ready to begin. Give me a thumbs down if there is something you need me to clarify before we begin.



Working with W-2 Participants with Multiple Barriers Challenges and Solutions PPT 24


Purpose: Learners acknowledge the challenges they face and the strategies and solutions they use in supporting and providing services to W-2 participants who have multiple barriers.

Materials: Prepared Google Slides presentation link

Estimated Length: 12 minutes

Directions to Trainer: Put the link to the Google Slides presentation in the chat. Instruct learners to identify and record on one or more challenge slide at least two solutions (strategies, techniques, tips, etc.) to one or more of the identified challenges learners face when working with W-2 participants with multiple barriers. After learners record their solutions, invite them to scroll through the presentation and read each other's solutions. Give six-eight minutes for this. Then move to the debrief.

Trainer Instructions to Learners: Let's take a moment to reflect on all we've talked about so far in this class: the strategies, tips, resources, and solutions you've heard from others and that you have shared. I just put a link to our Google Slides presentation in the chat.  Click on the link to open the presentation.  Scroll through the challenges that your colleagues recorded yesterday, and record at least two solutions to one or more of these challenges. You'll see boxes in which you can place your solutions. Your solution can be a strategy, tip, technique, or resource you use when you are working with W-2 participants who have multiple barriers.

 After you record your solutions, scroll through the other slides to read each other's ideas.

Debrief

What challenges are still out there that may need some solutions and strategies?

Responses will vary.

What do you notice about the solutions to your challenge?

Responses will vary.

Case Study: Goal Setting PPT 25 PG 27 (Camila), PG 34 (Monica), PG 41 (Ramona), PG 13-14




Purpose: Learners connect the concepts of assessment and goal setting tools to develop goals that engage a participant in taking baby steps.


Materials: Goal setting worksheet

Estimated Length: 40 minutes

Directions to Trainer: Divide learners into the same three groups from Day 1's Case Study. Schedule the breakout rooms for a total of 30 minutes (29 minutes with a 60 second countdown). Assign each trainer to one breakout room. Turn on your webcam, and encourage learners to do the same. Each group reviews all the information they have about the participant scenario they are working with (strengths, barriers, assessment information, etc.). Learners use that information to develop a Primary Employment Goal and one other goal of their choosing that can engage that participant.

After learners develop their goals, or 25 minutes have passed, have learners discuss the questions in the Participant Guide. Be sure one learner from the group is ready to report out.

Trainer Instructions to Learners: Yesterday, you gathered a lot of assessment information about the participant you are working with.  In just a moment, you'll return to your group and review that information.  Then, use those assessments to develop a Primary Employment goal, and one other goal of your group's choosing, for that participant. Add goal steps. Remember to be specific and detailed. Record your goals in your Participant Guide.  Discuss how these goals can engage the participant.

 After you develop your goals, have a conversation with your group about the questions in your Participant Guide.

Debrief:

1. What does this activity suggest to you about using assessment information to develop goals for a participant with multiple barriers?

Possible Responses:

- *Reviewing all the assessment information allows you and the participant to develop the most appropriate goals*
- *Participants are more likely to work toward and meet their goals if they are relevant to their current situation and circumstances*

2. How do you talk to and engage a participant to set a Primary Employment Goal when they say they can't or don't want to work?

Possible Responses:

- *Share with them the importance of having a Plan B. That, even though they may not want to go to work or feel like they can't, it's still good to think about that as an option*
- *Encourage the participant to begin to think that employment is a viable option*

3. Moving forward, in what ways will you use goal setting to engage a participant with multiple barriers?

Possible Responses:

- *Set up the participant for success by breaking down the goal into small steps*
- *Encourage the participant to dream*
- *Allow the participant to direct the first step*
- *Use motivational interviewing to discover what's important to the participant*
- *Use Career Assessments to help with goals getting to activities*
- *Meet the participant where they are at*

Day Two Wrap-Up

 PPT 26

 PG 15

Today, we discussed goal setting and how goal setting can be used as an engagement tool for W-2 participants with multiple barriers.

Piece of PIE

Purpose: Learners reflect on their learning from Day Two and decide what is most relevant and important for implementation on the job.

Estimate Length: 10 minutes

Directions to Trainer: Learners record their responses to the Piece of PIE questions in their Participant Guide. After about five minutes, have each learner share one piece of their pie.

Trainer Instructions to Leaners: In your Participant Guide, you'll see a Piece of PIE. Complete your pie by answering the questions in each of the pie pieces. You have five minutes. Be prepared to share one piece of your pie.

Variation Debrief:

1. What would it mean for your organization if they implemented the things in your PIE?
2. What would it mean if they did NOT implement the things on your pie?

Thank you all for sharing your take-aways!

Note to Trainer: Put the Google Slides link in the chat again.

Remember, we still have outstanding challenges in our Google Slides presentation. Feel free to review the challenges and add your solutions outside of class. We'll look at them again tomorrow. Tomorrow, we continue to put everything we talked about so far together and discuss engagement and accommodations.

Day Three Self-Facilitated Introduction

 PPT 27

Estimated Length: 15 minutes prior to beginning of class.

Directions to Trainer: Display the slide at least 15 minutes before class starts. Greet learners as they enter the class, and instruct learners to use their Text Annotation Tool to answer the question displayed on the screen. As they are answering the question of the day, engage the learners in some discussion related to their responses.

Day Three Welcome

 PPT 28

Welcome back to our final day of Working with W-2 Participants with Multiple Barriers. Yesterday, we discussed using goal setting as an engagement tool when working with participants with multiple barriers. Today, we continue our topic of engagement.

We've Been Robbed

 PPT 29 PG 16

Purpose: Learners recall their most important pieces of information from Day Two.

Estimated Length: 8-10 minutes

Directions to Trainer: Learners use their text annotation tool to add information to the poster on the PPT.

Trainer Instructions to Learners: Class, I hate to break this to you, but our virtual classroom was robbed last night. All the information we shared with each other yesterday was taken! We need to recapture and recreate all our missing information from yesterday. Using your text annotation tool, type on the screen what you can recall so we can “recreate” all our materials.

Note to Trainer: There is no official debrief. But, as learners are recording things on the screen, have a brief conversation, make additional points, or prompt further discussion or items to appear on the screen.


Nice work rebuilding the material we need for our class. Today, we're going to use all that material to discuss engagement and accommodations.

Engagement

 PPT 30 PG 17

Remember, a participant is more likely to succeed and participate in activities when they see the big picture. We can all relate to the ‘What’s in it for Me” approach to engagement. We can find out what motivates them by engaging in conversations using Motivational Interviewing techniques. Engagement becomes much easier after we know what participants want to achieve and develop steps toward their goals.


Let’s look at some important points of engagement. As we go through these, highlight or circle the point in your Participant Guide that resonates with you the most. Perhaps it’s one you use all the time, or something new you want to use or remember.

 First, you are not alone. You don’t need to be an expert on everything, and don’t need try to solve everything. There are many community resources available with whom you can collaborate.

Ask What community resources have you collaborated with? Put them in the chat.

Possible Responses:


- *Division of Vocational Rehabilitation (DVR)*
- *Aging and Disability Resource Center (ADRC)*
- *Comprehensive Community Services (CCS)*


 Overcoming barriers takes time. A participant’s change and progress doesn’t happen overnight. Smaller steps to the goals reinforce this. Right now, don’t focus on moving from A to Z. Just focus on moving from A to B.

 You are responsible for the process. The participant is responsible for the outcome.

Ask Who has heard this statement before? Give me a thumbs up reaction if you have, and a thumbs down reaction if you haven’t.

Encourage at least one learner who has heard the statement and one learner who hasn’t heard the statement share what it means to them.

 Ongoing assessments and support are necessary. The participant’s situation won’t stay stagnant. Change happens, along with progress and regression. It’s important for you to assess the participant’s current situation. Things that worked, or what they needed before, may not be what works or what they need now. Quickly follow up and redirect to assist the participant maintain progress. Help participants identify and use their support system, whatever that may look like for them.


 Finally, adjust the process and activities as the situation changes. An Employability Plan is not written in stone. It should reflect the most appropriate goals and activities at the current time. Update the goals, the activities assigned, the hours of participation, and the supportive services provided. Make sure you know and stay on top of any treatment or medical plan changes.


Ask Which point resonated with you the most? Why?
Responses will vary

Activities

 PPT 31

 PG 18

The W-2 program allows for a lot of flexibility when it comes to activities.  With proper accommodations, you can assign W-2 participants up to 40 hours a week in activities.

We have many different types of activities to choose from, which allows you the opportunity to be creative and  think outside of the box when it comes to engagement. Offer the participant choices when possible.


Seasonal Check-In


 PPT 32

Purpose: Learners interact with another learner to network and share ideas on how they have used creativity in assigning activities to engage participants with multiple barriers.

Estimated Length: 3 minutes

Directions to Trainer: Partner learners with someone not in their season. If there is an uneven number, the group of three should have a learner from 3 different seasons. If there are groups of two, create the breakout rooms for a total of 2.5 minutes (2 minutes with a 30 second countdown). If there is a group of three, create the breakout rooms for a total of 3 minutes (2 minutes with a 60 second countdown). Designate a learner whose name was in the Winter or Spring quadrant as the group leader. It is not necessary to debrief this activity.


Trainer Instructions to Learners: In just a moment, you'll be put into a breakout room with someone from a different season.  Together, discuss how you've used creativity

in the activity assignment.  If your name was in a Winter or Spring cell, you are the group leader. You have two and a half minutes to discuss. Group leaders, give me a thumbs up if you are ready to begin. Give me a thumbs down if there is something you need me to clarify before we begin.

Community Resources & Partners

PPT 33

PG 19

As we mentioned earlier, you are not alone. Often participants with multiple barriers are working with a wide range of other programs and providers.  Be sure to coordinate with those programs to ensure a unified and comprehensive approach to success and self-sufficiency. When it comes to partnering with DVR, we recommend reviewing the Technical Assistance Guide in the W-2 Policy Manual Appendix.

Ask Who has experience partnering with other agencies? Give me a thumbs up if you have or a thumbs down if you haven't.

Encourage A few learners to unmute and share their experience.

PPT 34


Ask What other benefits can you think of for partnering with other agencies? Use your text annotation tool to type benefits for you on the right side of the screen and benefits for the participant on the left side of the screen.

Possible Responses:

- *You and participant consider all appointments/requirements.*
- *Combine plans to achieve work, education, or training.*
- *Less confusing for participant because it is just one plan.*
- *Get more ideas and strategies you may not have thought of.*

PPT 35

You can create a pathway to successful partnership and collaboration by working with the participant and the other agencies throughout the entire process. Work to establish warm connections, and always follow up with the participant on how those connections are working. Do the same with the community agency.

 Recognize that one key to success is the connection between the participant's goals and activities. A participant is more likely to follow through and complete the activities if they see the "What's in it for Me."

We often focus on employment search. However, employment search is not just applying for jobs.

Ask What else can employment search involve?

Possible Responses:

- *Time used to research prospective employers*
- *Researching other types of jobs that utilize their transferable skills*
- *Meeting with a job developer*
- *Attending a structured job search workshop*
- *Contacting prospective employers, whether by phone, in person or via internet, to learn of job openings*
- *Completing applications for vacancies*
- *Preparing for job interviews*
- *Interviewing for jobs*




As you assign activities, justify your rationale behind these activities in PIN comments. Include your action plan for next steps, and how you use the assessment results. As you and the participant try new things, record where the participant has been and where they are going. Document the trials and errors of what the participant attempted. This record helps you see how far the participant has come, and allows you to remind them of their progress. It can help you and the participant celebrate their successes along the way, which can be used as motivation. This record also can help with any documentation for their SSI/SSDI application.



The appendix of your Participant Guide has other engagement considerations for you to think about, including information on TEMP and SSI/SSDI resources. Identifying community connections and appropriate activities helps you and the participant determine if they may need accommodations and what they are. Accommodations allow the participant to fully engage and participate in W-2 activities designed to help them reach their goals.

Accommodations

 PPT 36

Remember, the purpose of accommodations is to allow access to all W-2 activities to all participants, including participants with multiple barriers.  Accommodations make the opportunity to participate viable for all participants, no matter the extent of their barriers. Allowing all participants the chance to participate and take advantage of all that W-2 has to offer is critical to the success of the program and the success of each participant.

After determining activities, thoroughly review what you expect from the participant, and what they can expect to gain from each activity. This will help you identify any accommodations they need to fully participate in and benefit from each activity.

 Make accommodations detailed and specific, and  document them on the Services and Accommodations to Help You Do Your W-2 Activities Form (DCF-F-2564-E). The participant needs to see and believe that they can complete the activity if you have put an accommodation in place.


You need to set up accommodations in collaboration with the participant. If a participant has multiple barriers, it is likely they will need multiple accommodations.



Accommodation Waterfall


 PPT 37

Estimated Length: 7 minutes

Directions to Trainer: Ask learners to put an answer to the question on the screen in the chat, but not hit enter. Give learners one minute. Then, have learners hit enter when you say “Go” so that all the responses flood the chat at once. Instruct learners to review each other’s responses and give a thumbs up to their favorites. You do not need to read the chats aloud to the class. After a minute or so, put dashes in the chat and pose the next question.

Trainer Instructions to Learners: Coming up with multiple accommodations that work for participants can be challenging. In a moment, I’m going to display a question about accommodations on the screen.  Your job is to type your response to the question in the chat, but don’t hit enter yet. You’ll get about a minute to type your response.

 Then, when I say “Go,” hit enter so we have a waterfall in the chat.  Review the responses and give a thumbs up to your favorite ones. **Ask** What can I clarify before we begin?

 How do you identify potential accommodations?

Possible Responses:

- *Ask the participant to share what is standing in the way of their participation in this activity*
- *Ask the participant what they need to participate in a specific activity*
- *Ask “Can you tell me about your previous experiences in doing this activity or attempting to do this activity?”*
- *Utilize AskJan.com for assistance with accommodations*
- *Review and follow up on recommendations from professionals who completed the formal assessment*
- *Partner with Job Developers to identify employers who are willing to provide accommodations*
- *Partner with workshop facilitators to identify what type of accommodations are available*



What is one “out-of-the-box” accommodation you’ve seen or provided?

Responses will vary.

Dance Party Energizer

PPT 38

Estimated Length: 5 minutes

Directions to Trainer: Ask learners to complete the dance moves on the screen. Turn on your webcam and complete the moves as well.

Trainer Instructions to Learners: Remember, accommodations can be simple modifications, such as providing participants the opportunity to get up and move during their activities. Let’s all take the opportunity to get up and move with a little dance party. In a moment, I will start music and show a dance move on the screen. Perform the dance move for the entirety of the audio clip. Then, I will display the next one, and so on. If you aren’t familiar with the dance move, look at my webcam to see the dance move in action, or make up your own! What can I clarify before we get started?

All right, let’s get dancing!



Case Study: Engagement and Accommodations PPT 39 PG 27 (Camila), PG 34 (Monica), PG 41 (Ramona), PG 20-21


Purpose: Learners strategize engagement activities and accommodations for W-2 participants with multiple barriers.

Estimated Length: 40 minutes

Directions to Trainer: Learners and trainers return to the scenario breakout rooms they have been working with throughout the course. Schedule the breakout rooms for a total of 30 minutes (29 minutes with a 60 second countdown). Turn on your webcam and encourage learners to do the same. Within the breakout rooms, trainers will facilitate the brainstorm of ways to engage the participant in reaching their goal. This can be through activities, collaboration with other agencies, or additional advocacy with SSI/SSDI. Then, have learners identify potential accommodations the participant may need to successfully participate.

After they discuss engagement strategies and accommodations, or 25 minutes have passed, have learners discuss what they want to stop doing, what they want to improve or be aware of, and what they want to start doing.

Trainer Instructions to Learners: We have worked with some really tough scenarios this week. We started by having you review the assessment information and develop goals based on the assessment results.  Today, we'll use that information to brainstorm ways to engage the participant in meaningful activities to help them reach their goals. This could include assigning W-2 activities, collaborating with other agencies who can assist the participant, advocating with SSI/SSDI, obtaining additional assessments, and any other strategies you feel would benefit the participant moving forward.  Then, you'll brainstorm potential accommodations the participant may need to be successful.

 Finally, you'll work with your group to complete the stoplight in your Participant Guide. Discuss what you want to stop doing, what you want to improve or be aware of, and what you want to start doing.

 PPT 40**Debrief**

Let's hear from some of you. **Ask** What did you record on your stoplight?

Responses will vary

Working with W-2 Participants with Multiple Barriers Challenges and Solutions PPT 41 PG 22

Purpose: Learners acknowledge the challenges they face and the strategies and solutions they use in supporting and providing services to W-2 participants who have multiple barriers.



Materials: Prepared Google Slides presentation link


Estimated Length: 20 minutes

Directions to Trainer: Put the link to the Google Slides presentation in the chat. Instruct learners to identify and record on one or more challenge slide at least two solutions (strategies, techniques, tips, etc.) to one or more of the identified challenges learners face when working with W-2 participants with multiple barriers. After they record their solutions, invite them to scroll through the presentation and read each other's solutions. Provide learners about 8 minutes for this. Then, debrief as a large group. The debrief question is a lead-up to the final activity.

Suggested Modifications:

- Provide learners time to answer the debrief question on their own prior to the large group debrief.
- Engage in a large group brainstorm of solutions for any challenge that may not have solutions recorded.

Trainer Instructions to Learners: Let's take a moment to do a final reflection on all we've talked about so far in this class: the strategies, tips, resources, and solutions you've heard from others and that you have shared. I just put a link to our Google Slides presentation in the chat.  Click on the link to open the presentation.  Scroll through the challenges that your colleagues recorded on the first day, and just like you did yesterday, record at least two solutions to one or more of these challenges. This solution can be a strategy, tip, technique, or resource you use when you are working with W-2 participants who have multiple barriers.

 After you record your solutions, scroll through the other slides to read each other's ideas.

Debrief

We did this activity each day. What stood out to you?

Possible Responses:

- *Each of us have challenges. I'm not alone in this.*
- *I have ideas to offer. I know more than I thought I did!*

- *When you're working in a group, you really can generate a lot of ideas.*
- *Seeing others' ideas helps me generate my own solutions.*

Now What?


 PPT 42

 PG 23

Purpose: Learners develop a plan for idea sharing and problem solving when working with W-2 participants with multiple barriers.

Estimated Length: 10 minutes

Directions to Trainer: In breakout rooms, learners brainstorm how they can use the Challenges and Solutions activity at their own agencies to identify engagement strategies and tips that support themselves, colleagues, and W-2 participants with multiple barriers. Set up breakout rooms with learners from the same agencies or similar geographical areas (e.g., Milwaukee agencies, rural agencies, etc.). Set breakout rooms to end after 5 minutes (4 minutes with a 60 second countdown). After breakout rooms end, groups share one idea with the rest of the class.

Trainer Instructions to Learners: As we mentioned on Day One, you have skills, knowledge, and talent you can share with others at your agency, with others at different agencies, and within your community. Working with W-2 participants with multiple barriers can pose challenges, but we are in this together. I invite you to think about this Challenges and Solutions activity. What action ideas has this triggered for you? In just a moment, we'll move you in to breakout rooms.  With your group, brainstorm how can you use this Challenges and Solutions activity, or something similar, at your agency to support yourself, your colleagues, and W-2 participants with multiple barriers. You'll have about five minutes. Be sure to designate a spokesperson to share with the large group.

Debrief:

Let's hear from each group. I want you to share one idea of how you can use this activity back at the office with the rest of the class.

Note to Trainer: If you have not already done so, put the link to the class evaluation in the chat. Give learners time to click on the link and open the evaluation.






Handy Information PPT 43 PG 24

Purpose: Learners reflect and record their key learning points from the training.

Estimated Length: 5 minutes

Directions to Trainer: Ask learners to trace one of their hands on a blank sheet of paper. Read through questions one at a time, pausing between each for about 30 seconds to allow learners to record their thoughts.

Trainer Instructions to Learners: I want you to trace your hand in your Participant Guide.

-  On your thumb, record something new that opposed what you already thought or did. (Opposable thumbs)
-  On your pointer finger, record something new somebody pointed out to you.
-  On your middle finger, record the biggest new idea. (Middle fingers usually are the longest.)
-  On your ring finger, record something that rings true. (Something you already are doing.)
-  Finally, on your pinky finger, record one small change you can make that will make a difference.

Debrief: Depending on time, you can ask some learners to unmute and share one of their finger take aways, or ask learners to flood the chat with one of their finger take aways.

Closing

 PPT 44 PG 25

We've come a long way since this class's opening conversation. Thank you for your participation and the strategies you shared for overcoming the challenges that arise when working with W-2 participants with multiple barriers. The work you do with participants and their families is vital to the health, safety, and security of all families in the state of Wisconsin.

Appendix A – Camila

Camila's Story

Camila enrolled in W-2 two months ago and is in a W-2 T placement. She is 27 years old and has a 5-year-old daughter, Luna. They live in Milwaukee.

Basic Information

- Knows English and Spanish
- Stable housing
- Uses public transportation

Work Experience

- Five years ago – waitress at Red Lobster for two months
- No other work experience

Work Programs

- FEP referred her to DVR and ARDC
 - Declined referral; states she is not interested

Education

- High school diploma
- Gale Course certifications:
 - Music Therapy and Sound Healing
 - Speed Spanish
 - Spanish for Medical Professionals

Barriers

- Asthma, bi-polar disorder, anxiety, depression
- Counselor doesn't recommend work
- Reports Luna has mental health barriers, but won't disclose more information
 - Shuts down or changes subject every time FEP brings it up

Other

- Wants to work as a Spanish medical interpreter to help people
 - Would need medical terminology classes
- Feels strengths are caring character, bravery, artistic skills, and compassion and patience with people
- Wants to improve on time management and organization
- Working with attorney to obtain SSDI
 - Submitted application, awaiting decision

Camila's Formal Assessment

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 Camila Martinez		Date of Birth 06 / 10 / XXXX	Social Security Number 025-84-7887	
Name of Professional Provider Angela Garcia, LMHC		Professional Title Licensed Mental Health Counselor		
Office Address 2110 S. 27th Street	City Milwaukee	State WI	Zip Code 53207	

Dear Mental Health Professional,

The individual named above is an applicant/participant in the **Wisconsin Works (W-2)** program. The purpose of this form is to gather information about this individual's current ability to participate in W-2 activities.

W-2 is a program designed to help individuals become self-sufficient through work and work readiness activities. In order to assign appropriate activities, it is important for us to have an idea of what tasks and assignments this individual is capable of. It is also important for us to know about accommodations and modifications that may assist this individual in participating in work readiness activities.

Activities that can be a part of a W-2 placement include:

- job readiness/life skills workshops;
- education and job skills training;
- on-the-job work experience;
- recommended medical treatments; and
- counseling and physical rehabilitation activities.

Please answer the following questions concerning this individual's impairments:

1. How frequently is the patient scheduled to meet with you? One time per week

Regarding current course of treatment, how long have you been meeting with this patient?
About two years

When is your next scheduled appointment with this patient? Next month

2. Are you aware of any other health care professionals who are currently treating this person? If yes, please identify provider name and purpose of treatment: N/A

3. DSM-IV-TR Multiaxial Evaluation:
 • include code and diagnosis for each axis
 • in addition to mental health, please include any diagnosis related to alcohol or other substance abuse

Axis I: ADHD Axis IV: Severe

Axis II: General Anxiety Disorder Axis V: Current GAF: 55

Axis III: _____ Highest GAF Past Year: 55

DCF-F-126 (R. 10/2018)

4. Identify your patient's signs and symptoms associated with this diagnosis:

<input checked="" type="checkbox"/>	Poor Memory		Time or place disorientation
	Appetite disturbance with weight loss		Decreased energy
	Sleep disturbance	<input checked="" type="checkbox"/>	Social withdrawal or isolation
	Personality changes		Blunt, flat or inappropriate affect
<input checked="" type="checkbox"/>	Mood disturbance or lability		Illogical thinking or loosening of association
	Pathological dependence or passivity		Anhedonia or pervasive loss of interests
	Delusions or hallucinations	<input checked="" type="checkbox"/>	Manic syndrome
	Recurrent panic attacks		Obsessions or compulsions
	Somatization unexplained by organic disturbance		Intrusive recollections of a traumatic experience
	Psychomotor agitation or retardation		Persistent irrational fears
	Paranoia or inappropriate suspiciousness	<input checked="" type="checkbox"/>	Generalized persistent anxiety
	Feelings of guilt/worthlessness		Catatonia or grossly disorganized behavior
<input checked="" type="checkbox"/>	Difficulty thinking or concentrating		Hostility and irritability
	Suicidal ideation or attempts		Other:

5. If your patient experiences symptoms which interfere with attention and concentration needed to perform even simple work tasks, during a typical workday, please estimate the frequency of interference. *For this question, "rarely" means 1% to 5% of an eight-hour working day; "occasionally" means 6% to 33% of an eight-hour working day; "frequently" means 34% to 66% of an eight-hour working day; and "constantly" means more than 66% of an eight-hour working day.*

- rarely occasionally frequently constantly

Is your patient making positive progress? Yes No

Please describe the progress or lack of progress.

Camila attend all her scheduled appointments and actively participates in treatment.

6. To the best of your knowledge, is the patient on prescribed medications? Yes No

If yes, please list:

Prescribed by other doctors not at this clinic.

Describe any side affects of prescribed medications which may have implications for working, e.g., dizziness, drowsiness, fatigue, lethargy, stomach upset, etc.:

N/A

7. When did your patient's symptoms begin (estimate date)?

About two years ago

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

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

10. Does the psychiatric condition exacerbate your patient's experience of pain or any other physical symptoms? Yes No

If so, please explain:

N/A

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				
1.	Restriction of activities of daily living	None <input type="checkbox"/>	Slight <input type="checkbox"/>	Moderate <input type="checkbox"/>	Marked* <input type="checkbox"/>	Extreme <input checked="" type="checkbox"/>
2.	Difficulties in maintaining social functioning	None <input type="checkbox"/>	Slight <input type="checkbox"/>	Moderate <input type="checkbox"/>	Marked* <input type="checkbox"/>	Extreme <input checked="" 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 <input type="checkbox"/>	Seldom <input type="checkbox"/>	Often <input type="checkbox"/>	Frequent <input type="checkbox"/>	Constant <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)	Never <input type="checkbox"/>		Once or Twice <input type="checkbox"/>	Repeated*** <input type="checkbox"/>	Continual <input checked="" type="checkbox"/>

12. Please describe any additional functional limitations not covered above that would affect your patient's ability to work in a job on a sustained basis: N/A

13. 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 other W-2 activities?

- Once a month or less
- About twice a month
- Over twice a month
- More than 3 times a month

14. Has there been any recent acute episodes? If yes, please explain and give dates:
 No

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

16. Is the patient attending scheduled appointments? Yes No

If no, please explain and list missed appointment dates:

Do you attribute the missed appointments to the mental health impairment? Yes No

17. What kind of treatment plan is the patient involved in? What is the expected outcome?

Mental Health counseling one time per week.

If schedule for treatment plan is known, please include below or attach:

18. Please recommend any other activities and services not included in your treatment plan that may help this individual further address his/her mental health impairment:

Assessment (please specify type) _____ Treatment and counseling (please specify) _____

Advocacy for Social Security Income/Disability Other _____

19. What type of environment or conditions could help this person function most effectively in a variety of daily activities? _____

20. Considering this patient's mental health condition and limitations please indicate below what activities related to work and training you would recommend?

<input type="checkbox"/> work/work experience activities	<input type="checkbox"/> job skills training
<input type="checkbox"/> adult basic education/literacy	<input type="checkbox"/> supported job search activities
<input type="checkbox"/> job readiness/life skills workshops	<input checked="" type="checkbox"/> other _____

If no recommendations, please explain:

Should be on disability

21. Estimate the hours a day (5 days a week) this individual can participate in work/work readiness activities within these recommendations? 0 hours

22. Given your patient's current mental impairments, please specify a date when the recommendations that you have provided should be reviewed: N/A

Name of Professional Provider Angela Garcia	Title LMHC	Telephone Number 414-233-5555
Signature of Professional Provider <i>Angela Garcia, LMHC</i>		Date Signed 11/30/xxxx

Return completed form to:

Name of Agency Representative		Address		Date Sent
City	State	Zip Code	Telephone Number	Fax Number

Camila's Career Assessment

Career Cluster Interest Inventory

Arts, A/V Technology & Communication: Use creativity and talents on the job

Interests

- Drawing, sketching, or painting pictures
- Performance arts
- Creating original video
- Taking photographs
- Making jewelry, sculpture, or ceramics

Careers

- Graphic Artist
- Journalist/Reporter
- Photojournalist
- Musician
- Agents of artists, performers, and athletes
- Commercial and industrial designers
- Desktop publishers

Education and Training: Guide and train people

Interests

- Helping others draw, write, or read
- Playing games with spelling, reading, or math
- Tutoring others
- Coaching local sports team
- Volunteering at a literacy program
- Literacy Specialist
- Working in social organizations such as Big Brothers/Big Sisters

Careers

- School counselor or school psychologist
- Teacher or Teacher's aide
- College advisor
- Day care center director
- Librarian
- Vice Principal or Principal
- Adapted Physical Education Specialist
- Fitness and wellness coordinators

Human Services: Help individuals and families meet their personal needs

Interests

- Listening and helping friends with problems
- Delivering food and clothes to people in need
- Planning and making healthy meals and snacks
- Volunteering in a soup kitchen or food shelf
- Providing childcare
- Volunteering in a hospital or nursing home
- Interning at a nonprofit agency

Careers

- Childcare worker
- Deaf Interpreter
- Nutrition counselor
- Costume attendants
- Epidemiologist
- Massage therapist
- Mental Health counselors
- Music directors and composers
- Substance abuse and behavioral disorder counselors

Monica's Story

Monica has been in W-2 for almost six years. She has two teenage children and lives in rural southern Wisconsin.

Basic Information

- Knows English
- Owns her home, but struggles to pay property taxes
- Uses personal vehicle and has valid license

Work Experience

- Six years ago – Ran own cleaning business for five years
 - Cannot do any more due to limitations
- Reports no other experience

Work Programs

- Currently working with DVR

Education

- High school diploma
- Associate degree in photography

Barriers

- Cannot bend, lift, carry, or push things
- Complications from surgery left her in hospital/nursing home for a period of time
- Developed mental health issues due to unemployment and stress
- Daughter currently seeing school counselor due to mental health issues
- Can work with accommodations

Other

- Wants to find office work
 - Has no professional experience

Monica's Formal Assessment

DEPARTMENT OF CHILDREN AND FAMILIES
Division of Family and Economic Security

WME

MEDICAL EXAMINATION AND CAPACITY

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 Monica Johnson		Date of Birth 06, 20, XXXX	Social Security Number 144-66-5555	
Name of Professional Provider Dr. Aaron Levon		Professional Title Medical Doctor		
Office Address 2817 New Pinery Road	City Portage	State WI	Zip Code 53901	

Dear Health Professional,

The individual named above is an applicant/participant in the **Wisconsin Works (W-2)** program. The purpose of this form is to gather information about this individual's current ability to participate in W-2 activities.

W-2 is a program designed to help individuals become self-sufficient through work and work readiness activities. In order to assign appropriate activities, it is important for us to have an idea of what tasks and assignments this individual is capable of. It is also important for us to know about accommodations and modifications that may assist this individual in participating in work readiness activities.

Activities that can be a part of a W-2 placement include:

- o job readiness/life skills workshops;
- o education and job skills training;
- o on-the-job work experience;
- o recommended medical treatments; and
- o counseling and physical rehabilitation activities.

Please answer the following questions concerning this individual's medical condition(s):

1. How frequently is the patient scheduled to meet with you? 7 times in last year - this is variable

Regarding current course of treatment, how long have you been meeting with this patient? 8/8/2017

When is your next scheduled appointment with this patient? today + 3 months

2. Are you aware of any other health care professionals who are currently treating this person? If yes, please identify provider name and purpose of treatment:
Dr. A. Hanseon - physical medicine, Dr. B. Carver - OB/Gyn, D. M. Miller - psychology, J. Carson, PAC - Neurology, Dr. T. Graham - GI, Dr. F. Giamati - Rheumatology

3. Diagnosis/Condition:
Borderline personality disorder, chronic sinusitis, lumbar radiculopathy, obstructive sleep apnea, asthma, GERD, panic disorder, polyarthralgia, IBS, Anxiety + Depression

4. Prognosis: (if the patient's condition is related to pregnancy, please enter the expected date of birth)
Guarded

DCF-F-DWSP2012 (R. 10/2018)

5. When did your patient's symptoms begin (estimate date)? 3 years

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

6. What kind of treatment plan is the patient involved in? What is the expected outcome?
See multiple specialties

If schedule for treatment plan is known, please include below or attach:

7. What type of environment or conditions could help this person function most effectively in a variety of daily activities? Minimal stress, flexible schedule due to complex medical needs with frequent flares.

8. This individual may have his/her vocational capacity assessed. What, if any, accommodations should be provided for the assessment? See physical and mental capacity

9. Is the patient attending scheduled appointments? Yes No

If no, please explain and list missed appointment dates:

Do you attribute the missed appointments to the impairment(s)?

Yes No She attends appointments keep calendar

10. Identify any psychological conditions that you are aware of:

- Depression
- Somatoform disorder
- Psychological factors affecting physical condition
- Anxiety
- Personality disorder
- Other: _____

11. Physical Capacities

Maximum ability to lift and carry on an occasional basis (no more than 2 hours out of an 8 hour day).

No limitation 100 lbs. 50 lbs. 20 lbs. 10 lbs. Other 5 pounds

Maximum ability to lift and carry on a frequent basis (no more than 6 hours out of an 8 hour day)

No limitation 100 lbs. 50 lbs. 20 lbs. 10 lbs. Other 5 pounds

Maximum ability to stand and walk (with normal breaks) during an 8 hour day.

No limitation no more than 6 hours no more than 2 hours Other 15 minutes

How many city blocks can this individual walk without rest or severe pain? 1/4 block

Maximum ability to sit (with normal breaks) during an 8 hour day.

No limitation no more than 6 hours no more than 2 hours Other 1/2 hour

For questions 12-14 below, "rarely" means 1%-5% of an eight-hour workday; "occasionally" means 6%-33% of an eight-hour workday; and "frequently" means 34%-86% of an eight-hour workday.

12. How often can this individual perform the following activities?

Activity	Never	Rarely	Occasionally	Frequently
Look down (sustained flexion of neck)		X		
Turn head right or left		X		
Look up		X		
Hold head in static position			X	
Twist		X		
Stoop (bend)		X		
Crouch/squat	X			
Climb ladders	X			
Climb stairs		X		

13. Does this patient have significant limitations with reaching, handling, or fingering? Yes No

If yes, please indicate the percentage of time during an 8-hour day that your patient can use hands/fingers/arms for the following activities:

Activity		Never	Rarely	Occasionally	Frequently
Hand: Grasp, turn twist objects	Right	X			
	Left		X		
Fingers: Fine finger manipulation	Right		X		
	Left		X		
Arm: Reaching (include overhead)	Right		X		
	Left	X			

14. If your patient's symptoms interfere with performance of simple work task, please estimate the frequency of interference?

- Never Rarely Occasionally Frequently

15. What is your assessment of this individual's ability to communicate and see?

16. Is your patient making positive progress? Yes No

Please describe the progress or lack of progress. **Multiple medical conditions make this difficult**

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

18. Does this person's medication(s) or treatment cause side affects that impact his/her ability to participate in a work/education environment (e.g., drowsiness, dizziness, nausea, etc.)?

- Yes No

If "Yes" specify: _____

19. Does this person require any adaptive devices or other accommodations to help him/her function effectively in a work/education environment (e.g., assistive device for ambulation, need to alternate positions frequently, limits on pushing and pulling, and operating hand or foot controls, accommodations for bending and stooping, part-time or flexible work schedule, etc.)?

Yes No Unknown

If "Yes" describe what is needed:

20. Identify any of the following that your patient is likely to experience:

- Low tolerance for frustration
- Difficulty communicating his/her needs
- Difficulty following instructions
- Inability to work with children
- Difficulty working around other people
- Difficulty controlling anger appropriately due to pain + disorder
- Socially inappropriate responses to situations
- Seizures
- Difficulty engaging in complex tasks that require judgment
- Difficulty maintaining activities of daily living
- Difficulty with decision making
- Difficulty following through on agreed actions
- Panic attacks
- Difficulty with reality interpretation
- Difficulty being in unfamiliar environment
- Difficulty with impulse control
- Difficulty maintaining concentration
- Other: _____

21. Please recommend any other activities and services not included in your treatment plan that may help this individual further address his/her mental health impairment:

- Assessment (please specify type) _____
- Treatment and/or counseling (please specify) _____
- Advocacy for Social Security Income/Disability _____
- Other _____

22. Additional Recommendations or Restrictions: Monica is doing everything asked and is limited due to multiple and complex medical conditions.

23. Considering this patient's condition(s) and limitation(s) please indicate below what activities related to work and training you would recommend?

- work/work experience activities
- adult basic education/literacy
- job readiness/life skills workshops
- job skills training
- supported job search activities
- other

If no recommendations, please explain:

3 hour 4 day training and could not concentrate and stay focused

24. Estimate the number of hours a day (5 days a week) this individual can participate in work/work readiness activities within these recommendations : 1-2 hours at most, depends on day

25. If you have indicated anywhere on this form that this patient is unable to participate in W-2 activities, please explain:

26. Given your patient's current medical condition(s), please specify a date when the recommendations that you have provided should be reviewed: 6 months

Name of Professional Provider Dr. Aaron Levon	Title Medical Doctor	Telephone Number 715-425-5555
Signature of Professional Provider <i>Dr. Aaron Levon</i>		Date Signed 11/23/XXXX

Return completed form to:

Name of Agency Representative		Address		Date Sent
City	State	Zip Code	Telephone Number	Fax Number

Monica's Career Assessment

WOWI Career Assessment Results

Aptitudes: Verbal, Abstractions

Work Styles: Isolative

Career Interest Areas:

Arts, Design, Entertainment, Sports, and Media: Integrating personal expression and art concepts, techniques, and processes to develop works that elicit an emotional or aesthetic response.

- Actors; Art Directors; Coaches; Craft Artists; Editors; Floral Designers; Interior Designers; Interpreters and Translators; Media Programming Directors; Photographers; Technical Writers

Office and Administrative Support: Compiling, recording, communicating, computing, copying, and otherwise organizing information for others.

- Bill and Account Collectors; Bookkeeping, Accounting, and Auditing Clerks; Court, Municipal, and License Clerks; Customer Service Representatives; File Clerks; Freight Forwarders; Hotel, Motel, and Resort Desk Clerks; Library Assistants; Office Clerks; Postal Service Clerks; Public Safety Telecommunicators; Receptionists and Information Clerks; Tellers

Farming, Fishing, and Forestry: Working out-of-doors, which may include contact with plant or animal life.

- Agricultural Workers; Animal Breeders; Farmworkers and Laborers; Fishing and Hunting workers; Forest and Conservation Workers; Logging Equipment Operators

Appendix C – Ramona

Ramona's Story

Ramona enrolled in W-2 eight months ago and in a W-2 T placement. She is 36 years old and has a 16-year-old son, Todd. They live in a metro community.

Basic Information

- Knows English
- Stable housing
- Uses personal vehicle or bus and has valid license
 - Can drive only during daylight hours

Work Experience

- One year ago – worked in a call center for a year
 - Ended due to barriers
- Other prior experience in call centers and office/reception positions

Work Programs

- Currently working with DVR and Comprehensive Community Services (CCS)

Education

- High school diploma
- Lapsed certificate in patient advocacy

Barriers

- Anxiety due to PTSD and past traumatic experiences
- Psychologist states it is difficult for her to participate in W-2
- Reports chronic medical condition and learning/cognitive issues
 - Refuses formal assessment

Other

- Determined to get SSDI
 - Applied and awaiting decision
 - Has refused prior attempts to develop a plan B
- Would like to find part-time work in patient advocacy after SSDI approval
- Has not made much progress since enrollment

Ramona's Formal Assessment

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 Ramona Barker		Date of Birth 10 / 20 /XXXX	Social Security Number 320-44-8740	
Name of Professional Provider Belinda Williams, PhD		Professional Title Psychologist		
Office Address 2110 Elm Street	City Madison	State WI	Zip Code 53953	

Dear Mental Health Professional,

The individual named above is an applicant/participant in the **Wisconsin Works (W-2)** program. The purpose of this form is to gather information about this individual's current ability to participate in W-2 activities.

W-2 is a program designed to help individuals become self-sufficient through work and work readiness activities. In order to assign appropriate activities, it is important for us to have an idea of what tasks and assignments this individual is capable of. It is also important for us to know about accommodations and modifications that may assist this individual in participating in work readiness activities.

Activities that can be a part of a W-2 placement include:

- o job readiness/life skills workshops;
- o education and job skills training;
- o on-the-job work experience;
- o recommended medical treatments; and
- o counseling and physical rehabilitation activities.

Please answer the following questions concerning this individual's impairments:

1. How frequently is the patient scheduled to meet with you?
Twice weekly

 Regarding current course of treatment, how long have you been meeting with this patient?
1.5 years

 When is your next scheduled appointment with this patient? Next week

2. Are you aware of any other health care professionals who are currently treating this person? If yes, please identify provider name and purpose of treatment: Dr. M. Randy, MD; Dr. L. Miller, OD; A. Johnson, RT

3. DSM-IV-TR Multiaxial Evaluation:
 - include code and diagnosis for each axis
 - in addition to mental health, please include any diagnosis related to alcohol or other substance abuse

Axis I: Anxiety Disorder NOS Axis IV: _____
 Axis II: _____ Axis V: Current GAF: 45
 Axis III: _____ Highest GAF Past Year: 45

DCF-F-126 (R. 10/2018)

4. Identify your patient's signs and symptoms associated with this diagnosis:

<input checked="" type="checkbox"/>	Poor Memory		Time or place disorientation
<input checked="" type="checkbox"/>	Appetite disturbance with weight loss	<input checked="" type="checkbox"/>	Decreased energy
<input checked="" type="checkbox"/>	Sleep disturbance	<input checked="" type="checkbox"/>	Social withdrawal or isolation
<input checked="" type="checkbox"/>	Personality changes		Blunt, flat or inappropriate affect
<input checked="" type="checkbox"/>	Mood disturbance or lability		Illogical thinking or loosening of association
	Pathological dependence or passivity		Anhedonia or pervasive loss of interests
	Delusions or hallucinations		Manic syndrome
<input checked="" type="checkbox"/>	Recurrent panic attacks		Obsessions or compulsions
	Somatization unexplained by organic disturbance	<input checked="" type="checkbox"/>	Intrusive recollections of a traumatic experience
	Psychomotor agitation or retardation		Persistent irrational fears
	Paranoia or inappropriate suspiciousness	<input checked="" type="checkbox"/>	Generalized persistent anxiety
<input checked="" type="checkbox"/>	Feelings of guilt/worthlessness		Catatonia or grossly disorganized behavior
<input checked="" type="checkbox"/>	Difficulty thinking or concentrating	<input checked="" type="checkbox"/>	Hostility and irritability
<input checked="" type="checkbox"/>	Suicidal ideation or attempts		Other:

5. If your patient experiences symptoms which interfere with attention and concentration needed to perform even simple work tasks, during a typical workday, please estimate the frequency of interference. *For this question, "rarely" means 1% to 5% of an eight-hour working day; "occasionally" means 6% to 33% of an eight-hour working day; "frequently" means 34% to 66% of an eight-hour working day; and "constantly" means more than 66% of an eight-hour working day.*

- rarely occasionally frequently constantly

Is your patient making positive progress? Yes No

Please describe the progress or lack of progress.

Ramona continues to process trauma and improve her understanding of how her mental health symptoms impact functioning. Ramona has also demonstrated improvements in interoception and emotional granularity.

6. To the best of your knowledge, is the patient on prescribed medications? Yes No

If yes, please list:

Ketoconazole, meloxicam, quercetin, irbesartan, fluticasone, montelukast, acetaminophen, melatonin, dyphenhydramine, quafacine, flovent, certerizine, albuteraol

Describe any side affects of prescribed medications which may have implications for working, e.g., dizziness, drowsiness, fatigue, lethargy, stomach upset, etc.:

Stomach upset, nausea, dizziness, diarrhea, incontinence, lightheadedness, headache, fever, earache, drowsiness, tremors, restlessness, insomnia

7. When did your patient's symptoms begin (estimate date)?

In childhood; first major trauma experienced at age 6

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

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

10. Does the psychiatric condition exacerbate your patient's experience of pain or any other physical symptoms? Yes No

If so, please explain:

Anxiety causes muscle tension that exacerbates pain, causes sleep disturbances, and reduces the body's ability to heal

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				
1.	Restriction of activities of daily living	None <input type="checkbox"/>	Slight <input type="checkbox"/>	Moderate <input type="checkbox"/>	Marked* <input type="checkbox"/>	Extreme <input checked="" type="checkbox"/>
2.	Difficulties in maintaining social functioning	None <input type="checkbox"/>	Slight <input type="checkbox"/>	Moderate <input type="checkbox"/>	Marked* <input type="checkbox"/>	Extreme <input checked="" 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 <input type="checkbox"/>	Seldom <input type="checkbox"/>	Often <input type="checkbox"/>	Frequent <input checked="" type="checkbox"/>	Constant <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 <input type="checkbox"/>		Once or Twice <input type="checkbox"/>	Repeated*** <input type="checkbox"/>	Continual <input checked="" type="checkbox"/>

12. Please describe any additional functional limitations not covered above that would affect your patient's ability to work in a job on a sustained basis: In addition to her mental health symptoms, patient experiences physical limitations due to chronic illness.

13. 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 other W-2 activities?

- Once a month or less
- About twice a month
- Over twice a month
- More than 3 times a month

14. Has there been any recent acute episodes? If yes, please explain and give dates:
Ramona recently experienced dysregulation due to a triggering of trauma symptoms during an appointment with providers, which resulted in significant dissociation and a loss of ability to function.

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

16. Is the patient attending scheduled appointments? Yes No

If no, please explain and list missed appointment dates:

Do you attribute the missed appointments to the mental health impairment? Yes No

17. What kind of treatment plan is the patient involved in? What is the expected outcome?
Patient is engaged in relational psychotherapy to process trauma and develop skills to assist with self-regulation and stress reduction. Patient will increase her ability to function and experience a reduction in symptoms.

If schedule for treatment plan is known, please include below or attach:
Ongoing

18. Please recommend any other activities and services not included in your treatment plan that may help this individual further address his/her mental health impairment:

Assessment (please specify type) _____ Treatment and counseling (please specify) _____

Advocacy for Social Security Income/Disability Other _____

19. What type of environment or conditions could help this person function most effectively in a variety of daily activities? A calm and flexible environment free of potential triggers of patient's trauma, with support available for many tasks.

20. Considering this patient's mental health condition and limitations please indicate below what activities related to work and training you would recommend?

<input type="checkbox"/> work/work experience activities	<input type="checkbox"/> job skills training
<input type="checkbox"/> adult basic education/literacy	<input type="checkbox"/> supported job search activities
<input type="checkbox"/> job readiness/life skills workshops	<input type="checkbox"/> other _____

If no recommendations, please explain:
Patient is not able to effectively participate in any of the above activities.

21. Estimate the hours a day (5 days a week) this individual can participate in work/work readiness activities within these recommendations? Less than one hour daily

22. Given your patient's current mental impairments, please specify a date when the recommendations that you have provided should be reviewed: 6 months

Name of Professional Provider Belinda Williams, PhD	Title Psychologist	Telephone Number 608-232-5555
Signature of Professional Provider <i>Belinda Williams, PhD</i>		Date Signed 02/03/XXXX

Return completed form to:

Name of Agency Representative		Address		Date Sent
City	State	Zip Code	Telephone Number	Fax Number

Ramona's Career Assessment

O*NET – My Next Move Career Assessment Results**Interests**

Artistic – creating, designing, and making your own rules

- Art Therapists; Education Teachers; Nannies; Training & Development Specialists

Social – helping people, teaching, and talking

- Acute Care Nurses; Art Therapists; Crossing Guards; Customer Service Representatives; Exercise Trainers; Hosts & Hostesses; Nannies; Occupational Therapy Aides; Recreation Workers; Tour Guides & Escorts; Ushers, Lobby Attendants, & Ticket Takers

Investigative – ideas, thinking, and figuring things out

- Animal Scientists; Clinical & Counseling Psychologists; Industrial Engineers; Respiratory Therapists; Web Developers

Work Values

Good Working Conditions – Job security and good working conditions

- Landscaping and Groundskeeping Workers; Food Preparation Workers; Locksmiths and Safe Repairers; Floor Layers; Hearing Aid Specialists

Independence and Recognition – Work on own and make decisions

- Fishing and Hunting Workers; Baristas; Cooks, Fast Food; Maids and Housekeeping Cleaners; Food Service Managers; Nannies; Spa Managers; Farm Labor Contractors; Chefs and Head Cooks; Chemical Engineers; Lawyers

Achievement – Results oriented, use strongest abilities, give feeling of accomplishment

- Door-to-Door Sales Workers; Pressers, Textile, Garment, and Related Materials; Bakers; Fashion Designers; Photonics Technicians; Accountants and Auditors

Work Styles

Interpersonal Orientation – Pleasant, cooperative, sensitive to others, easy to get along with, and prefers associating with other organization members

- Art Therapists; Tutors; Skincare Specialist; Substance Abuse and Behavior Disorder Counselors, Lodging Managers

Social Influence – Has impact on others and displays energy and leadership

- Social and Community Service Managers; First-Line Supervisors of Retail Sales Workers; Medical and Health Services Managers; Food Service Managers; Chefs and Head Cooks

Achievement Orientation – Personal goal setting, tries to succeed at those goals, and strives to be competent in own work

- Library Science Teachers, Actors; Special Education Teachers; Film and Video Editors