Trainer's Notes

W-2 Case Management: Assessment and Employability Plans – Virtual Classroom

Purpose
To develop skills for the processes of assessment and Employability Plan development.

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

- Identify the purpose and reason for use of multiple assessments;
- Discuss the benefits of assessment with the W-2 applicant or participant, and the W-2 worker;
- Interpret assessment results with the W-2 applicant or participant, and make case management decisions based on those results;
- Formulate with the W-2 applicant or participant employment, education and personal goals based on assessment results;
- Facilitate the W-2 applicant or participant's identification of activities based on the individual's goals; and
- Demonstrate the relationships between assessment results, goals, and activity engagement and the corresponding system documentation.

Table of Contents

Materials

- Trainer's Notes
- Participant Guide
- Link to evaluation
- Sign-in Sheet
- Laptop
- PPT
- Zoom app installed
- Trainer Toolkit
- Link to the W-2 Manual - https://dcf.wisconsin.gov/manuals/w-2-manual/Production/default.htm

Trainer Prework

Scenario in Appendix A must be entered into the training environment 2-3 working days prior to class.

The Self-Facilitated Introduction slides must be updated prior to class on Days 2, 3, and 4. Fill in the Names column using the sign-in sheet. Also include the names of the trainers and producer.

Polling Questions

Polling questions must be created via the Zoom web portal and added to the sessions prior to class. There are times throughout the four days when you are told to bring up content related polling questions. Create the following polling questions.

Polling Question 1: Case Management Process Model
Which portion of the Case Management Process Model are you most comfortable with?

- *Assessment*
- *Planning*
- *Connecting with Resources*
- *Follow-Up*
- *Documenting*

Polling Question 2: Job Readiness Page
On a scale of 1 to 10, with 10 being the most valuable, how valuable is it to collect this job readiness information?

- *1*
- *2 or 3*
- *4 or 5*
- *6 or 7*
- *8 or 9*
- *10*

Polling Question 3: "BEST" Approach
At which aspect of the "BEST" approach do you feel you are a rockstar?
- *Balance*
- *Exploration*
- *Sensitivity*
- *Trust*
- *I might be a star, but not quite a rockstar yet.*

Polling Question 4: Pick Your Assessment
If you had to choose only one assessment to complete with participants, which assessment would you choose?
- *Informal*
- *Job Readiness*
- *Career*
- *Formal*

Polling Question 5: Goal Types
What type of goal are you most comfortable creating with participants?
- *Primary Employment Goal*
- *Secondary Employment Goal*
- *Other Program Goal*
- *Long Term Career Goal*
- *Personal Goal*

Polling Question 6: Activities
How many new activities did you think of and/or see that you would like to take back to the office with you?
- *1-2*
- *3-4*
- *5+*

Polling Question 7: All About the Informal Assessment
Which page of the Informal Assessment 'Rocks your socks'?
- *Work History*
- *Educational History*
- *Post-secondary Education*
- *Participant Barriers*

Polling Question 8: Comments
What key piece of information must be included in PIN Comments?
- *Your rational*
- *Summary of current situation*
- *Participant progress*
- *All the above*

Day 1

This is a 14-hour course. The following agenda is the suggested pace for the sessions.

AM Session Timing	Topic	PM Session Timing
9:00 – 9:10	Opening/Welcome	12:30 – 12:40
9:10 – 9:30	Six Word Memoir	12:40 – 1:00
9:30 – 9:35	Learning Objectives	1:00 – 1:05
9:35 – 9:45	Case Management is a Process	1:05 – 1:15
9:45 – 9:55	Assessment, Sit/Stand Energizer	1:15 – 1:25
9:55 – 10:30	Assessment Process Model, PSA Activity	1:25 – 2:00
10:30 – 10:45	*Break*	*2:00 – 2:15*
10:45 – 10:55	Informal Assessment	2:15 – 2:25
10:55 – 11:15	Informal Assessment Driver Flow	2:25 – 2:45
11:15 – 11:45	Informal Assessment Inventory Jeopardy	2:45 – 3:15
11:45 – 11:55	Lean In/Lean Out Energizer, Career Assessment and Job Readiness Pages	3:15 – 3:25
11:55 – 12:15	Job Readiness Activity	3:25 – 3:45
12:15 – 12:25	Day 1 Wrap-Up	3:45 – 3:55

Day 2

AM Session Timing	**Topic**	**PM Session Timing**
9:00 – 9:10	Day 2 Welcome, Wisconsin Says	12:30 – 12:40
9:10 – 9:30	Conversational Interviewing, "BEST" Approach	12:40 – 1:00
9:30 – 10:15	River of Jobs	1:00 – 1:45
10:15 – 10:30	*Break*	*1:45 – 2:00*
10:30 – 10:50	Formal Assessment	2:00 – 2:20
10:50 – 11:10	Accommodations, Race to Accommodate, Documenting Accommodations	2:20 – 2:40
11:10 – 11:30	Eyeball Yoga, Participation Statuses, Name that Status	2:40 – 3:00
11:30 – 12:00	Practicing Assessment	3:00 – 3:30
12:00 – 12:20	Assessment – Putting it Together, Day 2 Wrap-Up	3:30 – 3:50

Day 3

AM Session Timing	**Topic**	**PM Session Timing**
9:00 – 9:15	Day 3 Welcome	12:30 – 12:45
9:15 – 9:35	Goal Setting, How to Formulate SMART Goals, Personal Practice	12:45 – 1:05
9:35 – 9:45	Goals within the W-2 Program, Goal Steps, Goal Steps Energizer	1:05 – 1:15
9:45 – 10:25	Goal Setting Practice Scenario	1:15 – 1:55
10:25 – 10:40	*Break*	*1:55 – 2:10*
10:40 – 10:50	Employments, Engagement in Activities, Tying Goals to Activities	2:10 – 2:20
10:50 – 11:00	Activities, Find Something That… Energizer	2:20 – 2:30
11:00 – 11:50	Analyzing Activities	2:30 – 3:20
11:50 – 12:15	Supportive Services, Day 3 Wrap-Up	3:20 – 3:45

Day 4

AM Session Timing	**Topic**	**PM Session Timing**
9:00 – 9:15	Day 4 Welcome, Colleague Q&A	12:30 – 12:45
9:15 – 9:55	Practicing EPs	12:45 – 1:25
9:55 – 10:15	Energizer, EP Summary, Keys with EPs	1:25 – 1:45
10:15 – 10:30	*Break*	*1:45 – 2:00*
10:30 – 10:50	System Documentation, Assessment Documentation	2:00 – 2:20
10:50 – 11:35	Employability Plan Documentation, Energizer	2:20 – 3:05
11:35 – 11:50	PIN Comment, Comment Types Activity	3:05 – 3:20
11:50 – 12:10	Changes to Arya's Situation	3:20 – 3:40
12:10 – 12:30	Day 4 Wrap-Up, Closing Activity	3:40 – 4:00

Welcome/Introduction

PPT 1

Welcome to W-2 Case Management: Assessment and Employability Plans.

Note to Trainer: Have trainers turn on their webcams and introduce themselves prior to starting the Zoom walkthrough.

We have closed captioning turned on for this class. If you do not wish to see the closed captioning, you can click Live Transcript and then Hide Subtitle from your Zoom window.

PPT 2

Throughout this class, we use several different features in Zoom.

PPT 3

Access the chat feature by clicking on the Chat button at the bottom of your screen. This opens a conversation pane in your window. Everybody say 'hello' in the chat so we know that you found it.

Note to Trainer: Pause to allow learners to find their chat and send a 'hello.' After everyone has written in the chat, or one minute has passed, move on.

PPT 4

Depending on your version of Zoom, you can access additional features by clicking on Participants or Reactions at the bottom of your screen. From here, you can use various buttons to provide us feedback. If, at any point, you need us to slow down, please use the gray "go slower" button. Click the Thumbs Up button so we know you found it.

Note to Trainer: Pause to allow learners to click Thumbs Up. After everyone has done this, or thirty seconds have passed, move on.

PPT 5

Sometimes, we'll ask you to mark on the screen using annotations. To access annotations, click View Options at the top of your screen. Select Annotate to open the annotations tool bar. The stamp annotation is one we plan to use. Go ahead and pick one of the stamp options and put a stamp on the screen. Another annotation we plan to use is text. Use this to type text on the screen. After selecting the text annotation, use the format button to change the color or size of your text. To stop using annotations, click the X button on the right-hand side of the annotation toolbar.

Note to Trainer: Clear annotations before moving on.

☼ PPT 6

You'll have a chance for some discussion in small groups during this class. When we send you to a breakout room, you'll see this window pop up. Then, you and other learners will join the room. Feel free to turn on your webcams, if you have them, during this time. If you need help from a trainer, click the Ask for Help button to invite the host. When your time is up in the breakout room, Zoom automatically brings you back to the main session. If you leave the breakout room sooner, be sure to choose the option to leave the room and not the meeting.

We will start the class by having everyone introduce themselves. When I call your name, unmute, and let us know your agency, job function, and how long you have been in your current position.

Note to trainer: We are asking length of time in current position to assist with determining groups so we don't have workers with all the same level of experience in the same group.

Six Word Memoir Activity

☼ PPT 7

PG 4

Purpose: Learners experience an assessment process where they provide personal information on short notice.

Estimated Length: 20 minutes

Directions to Trainer:

Part 1: Allow 3-5 minutes. Instruct learners to write down as many words or phrases as they can think of to describe themselves (how they see themselves; their strengths; their weaknesses; their likes, interests, and life experiences; their relationship to others; how they see the world).

Part 2: Give learners 2-3 minutes to create a life memoir, using only six words. The memoir can be a sentence, or a simple phrase(s). Inform learners they will be sharing their memoir with a small group.
Part 3: Send learners into breakout rooms, with four learners in each room. Groups may share only their memoir; at this time. No other statements or explanations should be given, and no questions should be asked. Give them 4 minutes.

Trainer Instruction to Learners:
Let's jump into the topic of assessment with an activity.

Part 1: In your Participant Guide, write down as many words or phrases you can think of to describe yourself: how you see yourself; your strengths; your weaknesses; your likes, interests, and life experiences; your relationship to others; how you see the world. I'll give you a few minutes for this.

Part 2: Use the words and phrases you wrote down to describe yourself to create your memoir, using only six words. Record the memoir at the bottom of your Participant Guide. Your memoir can be a sentence, or a simple phrase or phrases. You will share your memoir in breakout groups. You have 3 minutes to write your memoir.

Part 3: Next, we are going to put you into a breakout room. Share your memoir with your group. Offer no additional statements or explanations. As group mates, you do not ask questions when others share their memoirs. After everyone has had a chance to share their memoir, return to the main training room. You have 4 minutes.

Note to Producer: Put learners into breakout rooms of 3-4. Schedule the breakout rooms to end after 3 minutes with a 60 second countdown.

Debrief Questions
Let's answer some questions. Unmute and share your answer or type your responses in the chat.

1. What was it like to describe yourself?
2. How easy or difficult was it for you to pare your words down to your six-word memoir?
3. How did it feel to share only those six words with someone else? How did it feel to hear only six words about someone else?
4. What type of follow up questions would you like to have asked? Or, what type of follow up explanation would you liked to have given?
5. How might this experience correlate to how a participant may feel during an initial appointment?

Some background information of the Six Word Memoir: According to literary legend, novelist Ernest Hemingway was challenged to write a short story, using only six words. The story he produced stated, "For sale: baby shoes, never worn." In 2006, writers for the U.S. based online story-telling website, SMITH Magazine, personalized this challenge and added a twist, encouraging readers to write their life memoir using only six words. Since then, the six-word memoir has become popular with all types of writers, both famous and obscure. Let's look at some six-word memoirs.

Succeeded in forgiving; failed to forget. -Denise Diaz; Only I define who I am. -Montel Williams; Wanted independence but have two dependents. -Tina Lazar; We would have named him Xavier. -Jose A. Amayo; Having "senior moments" at age 28. -Kimber Jones; Learned more from poverty than wealth. -Michael Ragborn; I'm so tired I'm awake again. -Chelsea Handler; Woman mistakes job for life. -Betsy Rader; Last chapter hasn't been written yet. -Angie Stahl; It all changed in an instant. -book title; Not quite what I was planning. --book title; I can't keep my own secrets. -book title

This opening activity allowed you the opportunity to experience how participants may feel at their initial appointment with you, meeting their worksite supervisor, or other professionals with whom they may be working. For some, it may be easy to talk about themselves; for others, this can be an uncomfortable experience.

It's important to remember is that assessment is about gathering information to uncover the whole story, and not making assumptions about who someone may or may not be. We'll talk about what information we gather, how we use it and our purpose for gathering it.

Intro to Course

PPT 8

PG Cover Page

Learning Objectives

Review the learning objectives for this course on the cover of your PG. The abbreviated learning objectives also are listed on the screen. Select the three objectives you are drawn to most. Then mark your three favorites on the slide using your stamp annotation tool.

Note to Trainer: Give the learner 2-3 minutes to review and identify the leaning objectives to which they are most drawn. Here are the learning objectives.

- Identify the purpose and reason for use of multiple assessments.

- Discuss the benefits of assessment with the W-2 applicant or participant, and the W-2 worker.
- Interpret assessment results with the W-2 applicant or participant, and make case management decisions based on those results.
- Formulate with the W-2 applicant or participant employment, education and personal goals based on assessment results.
- Facilitate the W-2 applicant or participant's identification of activities based on the individual's goals.
- Demonstrate the relationships between assessment results, goals, and activity engagement and the corresponding system documentation.

Note to Trainer: Acknowledge the objectives that appear to be receiving the most stamps.

All the objectives will be covered and reinforced through discussion and activities throughout these four days. Let's start by looking at the process of case management.

Case Management Is a Process

☼ PPT 9

PG 5

Case management is a process. You are responsible for the process. The participant is responsible for the outcome.

Ask Who is at the center of case management? Who is the reason for our work?
Expected Response:
The participant, the applicant, the customer

Ask What do the participants give to us to help us provide effective case management?
Possible Answers:
- *Insight into their world*
- *What they want in life*
- *Hopes and dreams for their children*

- *Their experiences*
- *What motivates or inspires them*

Ask How do we get information from participants? (If learners struggle with this question, ask, "How do people get information from you?")
Possible Answers:
- *Forms*
- *Interviews*
- *Just talking with them (a conversation)*
- *Observations*

Polling Question 1: Case Management Process Model

Directions to Trainer: Pull up Polling Question 1: Case Management Process Model. Close out the question after everyone has answered, or after 1 minute has passed. Then, share the results.

For your reference, this is the question:
Which portion of the Case Management Process Model are you most comfortable with?
- *Assessment*
- *Planning*
- *Connecting with Resources*
- *Follow-Up*
- *Documenting*

Trainer Instructions to Learners: Throughout the next four days, we will ask a variety of polling questions. When one pops up, select your answer, and click Submit. Our first polling question is regarding the Case Management Process Model.

Let's hear from a few of you. Which portion of the Case Management Process Model are you most comfortable with and why?

Assessments

☼ PPT 10

PG 6

One portion of the Case Management Process Model is assessment. But, what is an assessment? Webster defines assessment as:

"The process of estimating or determining the significance, importance or value of; evaluating."

Reference: Webster's New World Dictionary of American English

☼ PPT 11

What does "assessment" mean to you? How do you define assessment?

In your Participant Guide, write your definition of assessment. Then, type your definition in the chat. You have three minutes to work on your definitions.

Now, take a few minutes to review each other's definitions for similarities and differences.

Debrief Questions
What similarities or differences did you notice among the definitions?
Responses will vary.

☼ PPT 12

With a working definition of assessment in mind, let's look at how assessment is defined in the W-2 Program.

🕮 Reference: W-2 Manual 5.1

> "…assessment is the process of gathering the needed information to develop an Employability Plan customized for the participant …"

Note to Trainer: This is the remainder of the definition. Read it to the learners. It is not on the PPT slide:

> "…that will result in either a successful employment outcome which starts the individual on a career path; or, if appropriate, a path to eligibility for Supplemental Security Income and/or Social Security Disability Income benefits."

These definitions provide the framework for the next few days as we continue to discuss assessment.

Sit/Stand Energizer

Estimated Length: 5 minutes

Directions to Trainer: Read each statement below, asking learners to stand if that statement is true for them, or sit down if the statement is not true for them.

Trainer Instructions to Learners: We have been sitting at our desks for a while, so let's take some time to move a bit prior to diving further into assessment. Everyone stand up if you are able. I will read several statements. If a statement is true for you, remain standing. If the statement is untrue for you, sit down.

Statements
Stand if…
You remember the name of the producer for this class.

This is the first virtual class you are taking with the Partner Training Team.

You were familiar with six-word memoirs prior to today.

You remember the Case Management Process Model from initial New Worker Training.

You are ready to dive into the Assessment Process Model!

I know I'm ready to dive into the Assessment Process Model, so let's get to it!

Assessment Process Model

PPT 13

PG 7

Assessment is one part of the case management process. Just like case management is a process, so too is assessment.

First, we collect assessment information, then evaluate it. Finally, we take action based on that information. We then repeat the process.

Collection is gathering information to help you assist participants reach their goals.

Evaluation is looking critically at each piece of information collected, both individually and collectively, determining with the participant how to use this information.

Action is using the information you collected and evaluated. You must take action based on the information, even if that action is only to reinforce a current case management approach.

You must document each of the follow three steps, Collection, Evaluation and Action, must be documented in the case record.

Documentation is done to track the participant's current situation, how they got there, what worked, what didn't work, and what is next. It tells the story of the time you spend working with a participant.

Assessment Process Model PSA Activity

☼ PPT 14

☞ TN Appendix B (97-100)

PG 8 and PG 45-48 (Appendix A)

Purpose: Learners review the four concepts of the assessment process.

Materials: Content sheet from the TN Appendix and PG Appendix.

Estimated Length: 30 minutes

Directions to Trainer:
Divide class into four groups and assign each group a concept (assessment, evaluation, action, and documentation) from the assessment process model that they will use to create a Public Service Announcement (PSA). Allow 15 minutes for the discussion and creation of the posters. One trainer enters each breakout room to assist learners with sharing their screen and selecting "share whiteboard" if they do not have access to Microsoft Word or Microsoft PowerPoin. Then, put the following information in the chat "Create a PSA poster for your assigned piece of the Assessment Process model."

Prior to the end of the session, a trainer re-enters the breakout room to ensure the spokesperson has saved their whiteboard PSA to share with other learners in the main session. Following the completion of the posters, each group's designated spokesperson explains/describes their PSA poster/concept while sharing their screen to display the PSA.

Trainer Instructions to Learners:
Your task is to create a Public Service Announcement (PSA) "poster" that gets to the heart of one part of the assessment process model. In a few moments, we'll put you into a breakout room and give you one of the concepts from the assessment process model.

You are provided the content (policy and process information) for each concept of the assessment process model in Appendix A of your Participant Guide. When making your poster, designate one group member to create the poster via Microsoft Word, Microsoft PowerPoint, or whiteboard within Zoom so that it can be shared with others when we return to the large group. Request a trainer to come into the breakout room if you don't have access to Microsoft Word or Microsoft PowerPoint and we will assist your spokesperson with sharing their screen and starting a whiteboard.

You have 15 minutes to create your poster based on the part assigned to your group. After posters are complete, we will return to large group and share the PSAs created. The person who has the shortest full name will report out and describe your PSA to the group.

Note to Producer: Put learners into 4 breakout rooms. Schedule the breakout rooms to end after 14 minutes.

Note to Trainer: When the groups return, have each group share their PSA poster.

Debrief questions:
- What did you notice about your PSA after seeing the others?
- In what ways do you agree with each PSA message?
- What did you see that changed the way you thought about the Assessment Process Model?
- In what ways could you create the right conditions to be successful with the Assessment Process Model?

Remember, assessment is not a linear process; it is an ongoing process in motion. We'll examine what this process may look like for different types of assessment. Let's start by taking a closer and more detailed look at informal assessment.

Informal Assessment

☼ PPT 15

PG 9

State Take five minutes to independently answer the questions related to informal assessment in your PG.

Let's hear what you have to say. As we work through the questions, please unmute your microphones and join the conversation or type your responses in the chatbox.

Ask What is an informal assessment?
Possible Answers:
- *A way to gather information about a participant*
- *One process that helps us make case management decisions*

Ask What are the benefits for the case manager in completing an informal assessment?
Possible Answers:
- *It provides information about a participant that is necessary to know in working with them*
- *Can create rapport*
- *Gives us insight into the participant's current situation*

Ask When does the process of informal assessment end?
Possible Answers:
- *Never, it's ongoing*

The informal assessment is continually ongoing as part of case management. However, the comprehensive informal assessment in WWP is required prior to initial placement AND before any placement changes, when a participant requests to have the questions reviewed and prior to denying an extension (if it hasn't been completed in the past year).

🕮 Reference: W-2 Policy Manual 5.1.1, 5.1.2, 5.1.3

Ask What actions might you take based on the outcome of the informal assessment?
Possible Answers:
- *Changes to a participant's activities or EP*
- *Placement changes*
- *Referral for additional assessment(s)*

☼ PPT 16

🕮 Reference: W-2 Manual 5.2.1
Let's review how the W-2 Program defines informal assessment.

The purpose of the informal assessment under W-2 is to gather information about an individual and their family to determine the:
- 🖱Individual's ability to become employed and remain employed;
- Services and activities necessary for the individual to become employed and remain employed;
- 🖱Appropriate placement of a participant;
- Need for further career assessment and planning;
- 🖱Need for vocational evaluation;
- Existence of potential disabilities or other specific limitations through screening with a validated screening tool; and
- Need for a formal assessment of any disabilities or other employment barriers by a qualified assessing agency or individual.

Ask How can you use the information gathered to make case management decisions?
Possible Answers:
- *Data, scores, forms tell us something about a participant that we need to know to determine appropriate activities, placement, etc.*
- *It provides information that can be acted upon*

Ask What do the following statements mean to you?
Informal assessment begins the assessment process. However, it continues over the life of the case.
Possible Answers:

- *Participants' situations change; therefore, we need to have the most current information*
- *Participants can progress or regress in activities; we need to continually monitor and assess this*

Think back to the Six Word Memoir activity from earlier today. Did your six words truly capture your entire self? Probably not. We change and grow. So do the participants we serve. Their stories change; therefore, we never stop uncovering where they are at right now and where they want to be in the future.

☼ PPT 17

Ask What are some ways you conduct informal assessments?
Possible Answers:
- *WWP Informal Assessment drive flow*
- *Paper and pencil tools*
- *Automated screening and assessment tools*
- *Face-to-face case management meetings*
- *Worksite performance evaluations*
- *Goal setting exercises/tools*
- *Follow through on job search and other assigned activities*

Informal Assessment Driver Flow

☼ PPT 18

PG 10-12

We continually monitor progress and a participant's current situation through documentation of assessment information and results in Wisconsin Work Programs (WWP). One way we do this is through the Informal Assessment Driver flow. Each page in the Informal Assessment driver flow includes a purpose statement. Use these statements as a conversation starter to explain the information you want to gather. The purpose for each page is listed in your PG.

Directions to Trainer:
Part 1: Briefly review the Informal Assessment driver flow pages and purpose with learners.

Part 2: Divide learners into 4 breakout rooms to work together to identify case management benefits for their assigned Informal Assessment pages. There are 14 Informal Assessment pages, assign 3 pages to two groups and 4 pages to two groups. Give them 10 minutes to brainstorm best practices.

Part 3: Bring the breakout groups back together to debrief and share the case management benefits each group identified. Learners can add to their lists of benefits.

Trainer Instructions to Learners:
Part 1: Let's review the WWP Informal assessment driver flow. You can follow along in your Participant Guide.

Languages
Purpose: This page collects information on languages the participant reads, writes, and speaks.

Work History
Purpose: This page collects information on the participant's current and past employment, subsidized employment, and volunteer work.

Work Programs
Purpose: This page collects information on other work programs (e.g., FSET, DVR, WIOA, etc.) that the participant is involved in currently, has participated in previously, or will be working with in the future.

Education History
Purpose: This page collects information about the participant's high school graduation status, or about test scores if the participant is working toward a GED/HSED.

Post-Secondary Education
Purpose: This page collects information about post-secondary education, licenses, and certifications that the participant has or is working on.

Military Service
Purpose: This page collects information on the participant's military service and training.

Housing
Purpose: This page collects information on the participant's current and past housing situations.

Transportation
Purpose: This page collects available transportation methods for the participant and the status of his or her driver's license.

Legal Issues
Purpose: This page collects information about legal issues and required court appearances for the participant and members of the household.

Participant Barriers

Purpose: This page collects information on the participant's health and wellness that may impact his or her ability to obtain and maintain employment, including accommodations.

Child and Youth Supports

Purpose: This page collects information about children in the household who may need services and support, especially child care. There also are questions related to WIC, Head Start, and other community programs for youth.

Family Barriers

Purpose: This page collects information about SSI/SSDI applications for the participant and other household members, as well as information about other family issues that may impact a participant's ability to participate in work or work activities.

Non-Custodial Parents

Purpose: This page collects information about the participant's role as a Non-Custodial Parent (NCP), including information about the primary caretaker and the child.

NCP Referral

Purpose: This page collects information about the Non-Custodial Parent(s) (NCPs) of the participant's children to determine if the agency can offer NCP services.

Part 2: In a moment, we are going to put you into breakout rooms. Take 10 minutes to work together in your group to identify the case management benefits of each page of the informal assessment pages assigned to your breakout room. Write the benefits your group identifies in your Participant Guide. The person who woke up the earliest will report out for your group during the debrief.

Note to Producer: Put learners into 4 breakout rooms. Schedule the breakout rooms to end after 9 minutes.

☼ PPT 19

Languages

Purpose: This page collects information on languages the participant reads, writes, and speaks.

Case Management Benefits: *Depending on the participant's primary language, there may be a need for translators or other language services. Participants who are bilingual possess a marketable employment skill.*

Work History

Purpose: This page collects information on the participant's current and past employment, subsidized employment, and volunteer work.

Case Management Benefits: *Employment history is a critical part of informal assessment. Employment history helps build a resume, discover transferrable skills, and identify future opportunities in the same field or a similar one. Patterns of employment may indicate strengths or the potential for barriers that* ***must*** *be addressed. Current employment is a foundation for skill building and advancement.*

Work Programs

Purpose: This page collects information on other work programs (e.g., FSET, DVR, WIOA, etc.) that the participant is involved in currently, has participated in previously, or will be working with in the future.

Case Management Benefits: *Past participation in other work programs may have helped the participant develop skills or gain experience they can build on now. Current participation in other work programs is an opportunity for collaboration. You can help the participant prepare for future participation by incorporating it in current employability planning.*

Education History

Purpose: This page collects information about the participant's high school graduation status, or about test scores if the participant is working toward a GED/HSED.

Case Management Benefits: *Data captured on this page is critical for the educational needs assessment required by W-2 Policy (W-2 Manual 5.3.1). Information about education history and test levels drives assignment of education activities, and impacts employment and training opportunities*.

Post-Secondary Education

Purpose: This page collects information about post-secondary education, licenses, and certifications that the participant has or is working on.

Case Management Benefits: *Post-secondary education makes a participant more employable and significantly increases lifetime earnings potential. If a participant is in the process of getting a degree or certification, completion may become part of the employability plan. Licenses and certifications are important assets when marketing a participant to an employer.*

Military Service

Purpose: This page collects information on the participant's military service and training.

Case Management Benefits: *There are special programs that can assist veterans with employment. Skills learned while in military service are transferrable to work or work activities. The skills make a participant marketable to potential employers and set the foundation for additional education and training activities.*

Housing

Purpose: This page collects information on the participant's current and past housing situations.

Case Management Benefits: *For parents to participate in work or work activities, stable housing is essential. Patterns of housing difficulties in the past may be an indicator of larger needs that could impact employability and participation. This is an opportunity to connect participants with available housing resources if needed*.

Transportation

Purpose: This page collects available transportation methods for the participant and the status of his or her driver's license.

Case Management Benefits: *Reliable transportation is key to participating in work or work activities. Some jobs require a valid driver's license. The type of license a participant holds (e.g., Regular, Occupational, Commercial, etc.) also impacts employability. You can document referrals to assist a participant with his or her transportation needs.*

Legal Issues

Purpose: This page collects information about legal issues and required court appearances for the participant and members of the household.

Case Management Benefits: *Legal issues may affect the participant's ability to participate in work or work activities. A Community Corrections Agent is a potential collaborating partner in case management. You may be able to include some required supervision activities in the Employability Plan. Referrals to outside resources may assist the participant with resolving or managing these issues.*

Participant Barriers

Purpose: This page collects information on the participant's health and wellness that may impact his or her ability to obtain and maintain employment, including accommodations.

Case Management Benefits: *The responses to these questions assist you in determining if the participant may benefit from a formal assessment provided by a certified professional. Formal assessment results enable you to make important decisions such as the appropriate placement, short and long-term goals, education and* *training activities, and other services or work site accommodations that may be needed.*

Child and Youth Supports

Purpose: This page collects information about children in the household who may need services and support, especially child care. There also are questions related to WIC, Head Start, and other community programs for youth.

Case Management Benefits: *Child care often is essential for a parent to participate in work or work activities. A Child Welfare Worker involved with the family is a potential collaborating partner in case management. You can enter contact information for a Child Welfare Worker in the Contacts section on this page. You may include some court-ordered or planned child welfare activities in the employability plan. You also can use this page to identify other resources that can benefit the children and may improve the life of the family.*

Family Barriers

Purpose: This page collects information about SSI/SSDI applications for the participant and other household members, as well as information about other family issues that may impact a participant's ability to participate in work or work activities.

Case Management Benefits: *If the participant has applied for or is interested in information about SSI/SSDI, have a conversation about the process and referrals for assessment. Connect the participant to an SSI/SSDI advocate if appropriate. Family members' issues can impact a participant's employability. Make referrals for support to address other family needs as well.*

Non-Custodial Parents

Purpose: This page collects information about the participant's role as a Non-Custodial Parent (NCP), including information about the primary caretaker and the child.

Case Management Benefits: *A participant who is also an NCP may have child support, parenting, visitation, or other requirements that may impact his or her ability to participate in work or work activities. Stressful family situations may impact the participant's ability to secure and maintain employment. There may be an opportunity for connecting the other parent with services that could benefit the child.*

NCP Referral

Purpose: This page collects information about the Non-Custodial Parent(s) (NCPs) of the participant's children to determine if the agency can offer NCP services.

Case Management Benefits: *Services provided to NCPs may strengthen family relationships and enhance the economic well-being of the children. You can make a referral for NCP services. (Services offered by W-2 agencies vary.)*

Part 3: Now that we have gone through case management benefits for each of the informal assessment topics in the informal assessment driverflow.

Ask What did you notice about the benefits of each?
Possible responses: All help us to get a clearer idea of what is happening with a participant,

Ask What benefits were easy for you to identify?
Possible responses: These will vary due to responses being a personal opinion of what is easy.

Ask How does knowing this information benefit families receiving W-2?
Possible responses: It helps to eliminate surprises down the road when working with participants.

Ask What does this suggest to you about the importance of gathering all this information?
Possible responses: One never knows what a key piece of information will be to have that can help direct the case management process to help the participants reach their goals.

Informal Assessment Inventory

Reference: W-2 Manual 5.2.2

In addition to the information you gather through completing the WWP Informal Assessment driver flow, you must cover the items listed in the informal assessment inventory. This is part of the informal assessment process, and you must review it with each W-2 participant at application and as part of ongoing case management.

Informal Assessment Inventory Jeopardy Activity

PPT 20

PG 13-14

Purpose: To familiarize learners with the informal assessment inventory items.

Materials: None

Estimated Length: 30 Minutes

Directions to Trainer – Part 1: Divide learners into two teams. Teams work together to find the informal assessment inventory items in the W-2 Manual, and record corresponding information in their Participant Guide.

Note to Producer: Add link to W-2 Manual in the chat.

Trainer Instructions to Learners – Part 1: We will divide you into two teams. As a team, work together to find the informal assessment inventory items in the W-2 Manual, Chapter 5.2.2, and record the items in your Participant Guide. You have five minutes.

Note to Producer: Put learners into 2 breakout rooms. Schedule the breakout rooms to end after 4 minutes. Add the W-2 Manual link in the chat.

Note to Trainer: When the groups return, have the first group report out five assessment inventory items and the second group report four items to ensure everyone has the correct items in their Participant Guide. Correct inventory items are:

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

☼ PPT 21

Directions to Trainer – Part 2: Teams play Jeopardy to learn more about the informal assessment inventory items. Explain that this operates just like real-life Jeopardy (incorrect answers deduct points). Learners' teams will be the groups they were just in. Explain each category, and inform learners that if they believe they know the answer, to put something in the chat (letter, number, icon, etc.). The first person to enter something in the chat gets to ask first. If they are incorrect, go to the next person from the chat from the other team. The person who got the answer correct gets to select the next clue. Continue until all clues have been answered. See below for the correct answers.

How do I get that?	Q & A	Write that down
Results from career assessments	Household budgeting/money management strategies	Job readiness
Job readiness	Access to social supports	Results from career assessments
Job skills	Current neighborhood environment and schools	Recent job search efforts
Recent job search efforts	Personal strengths, interests, and goals	Other needs or barriers
Other needs or barriers	Job skills	Personal strengths, interests, and goals

Trainer Instructions to Learners – Part 2: We will play a game of Jeopardy to learn more about the informal assessment inventory items. We will play by the same rules as regular Jeopardy; incorrect answers subtract points. Your team consists of the group you were just working with to find the informal assessment inventory items. I will read a clue. If you believe you know the correct answer, put something in the chat. This can be a single letter, number or icon. The first person to put something in the chat gets to answer first. If you are correct, your team gets the points, and you get to select the next clue. If you are incorrect, the other team will get to guess. We will continue until all clues have been revealed. All answers will be one of the nine informal assessment inventory items.

As you can see, we have three categories: 'How do I get that?', 'Q&A', and 'Write that down'. 'How do I get that?' are answers regarding how we gather the informal assessment inventory information and what methods we use to get that information. 'Q&A' are examples of follow-up questions we ask when obtaining the informal assessment inventory items. 'Write that down' are answers regarding where you record that informal assessment inventory information.

What can I clarify before we get started?

Note to Producer: Keep track of points and who is on each team this is part of the Trainer Toolkit.

Debrief Ask the following questions to bring this activity to a close.

- What stood out to you about the Informal Assessment Inventory items?
- What surprised you about your understanding of the Informal Assessment Inventory?
- What did you learn about the importance of the Informal Assessment Inventory?
- In what ways will this information help in providing services and resources to the participant and their family?

Lean In/Lean Out Energizer

Estimated Length: 5 minutes

Directions to Trainer: Have all the trainers turn on their webcams for this activity. Read the statements and demonstrate the actions.

Trainer Instructions to Learners: We will turn off the case management part of our brains for a bit and get moving again. This is a simple activity where you do what I say as I say it. We will do a practice round first. If you are able, turn on your webcams and put your Zoom window into gallery view.

Lean in
Lean out
Lean left
Lean right

Pretty easy, right? Now for round two, you will do what I say and say what I say. If you would like to unmute yourself, feel free to do so.

Lean out
Lean left
Lean in
Lean right
Lean in
Lean out
Lean left

For our final round, you will do the opposite of what I say. For example, if I say lean in, you will lean out.

Lean right
Lean left
Lean in
Lean left
Lean out
Lean in
Lean right

Thank you all for your participation! Everyone can turn off their webcams and go back on mute. We will turn our case management brains back on and pick back up with the Informal Assessment Inventory.

Career Assessment and Job Readiness Pages

PG 15

PPT 22

We collect a lot of information through the Informal Assessment Inventory. After collecting all this information, we continue along in our assessment process model by evaluating it, acting on it, and then finally documenting it all.
Thankfully, there are two specific pages in WWP where you can document almost all this great information about the Informal Assessment Inventory.

The first of these pages is the **Career Assessment** page. Be sure to document required career assessment information that covers work styles, skills, and interests within 30 days of a participant's initial placement. Remember, review this page as part of ongoing case management with participants, and reassess as needed.

The other page used to document Informal Assessment Inventory information is the **Job Readiness** page. This page is extensive, and contains questions aimed at helping you set participants up for success. The **Job Readiness** page does not need to be completed all in one appointment, but it must be completed within 30 days of a participant being placed.

Although the questions on the **Job Readiness** page are great conversation starters, it is important to go beyond just asking the questions. Many times, additional follow-up questions are needed.

Job Readiness Activity

PG 16-18

PPT 23

Purpose: Learners brainstorm follow-up questions to ask on the **Job Readiness** page in WWP.

Materials: None

Estimated Length: 15 minutes

Directions to Trainers: Divide the class into 5 groups, and assign each group one section of the **Job Readiness** page in the chat or verbally before they go into breakout rooms. In breakout rooms, each group comes up with a list of at least 10 follow-up questions that they could ask from that section. Give them ten minutes. At the end of the ten minutes, groups come together to report out on their follow-up questions. Have each group select a person to report their follow up questions out to the larger group.

Trainer Instructions to Learners:
Working in small groups, you will be assigned a specific section of the **Job Readiness** page. First, review the questions that you ask in that section. Then, as a group, come up with at least 10 follow-up questions that you could ask participants in that section. You have ten minutes.

After ten minutes of brainstorming follow-up questions, we will rejoin the large group and discuss the follow-up questions you came up with. The person who has worked in W-2 the longest will report out for your group.

Note to Producer: Put learners into 5 breakout groups. Schedule the breakout rooms to end after 9 minutes.

Note to Trainer: When the groups return, have each group report out.

Work Preferences Questions
Potential questions:
What type of hours would someone with that position have?
What about that job may not interest you?
How long do you think training would take to complete?
How could you get relevant experience for that type of job?
Do you know if any of those companies are hiring?
How can you research companies that may have jobs like that available?
What don't you like about the jobs you prefer to avoid?
Why is that your ideal work schedule?
Are you willing to deviate from your ideal work schedule?
Are there any hours that you absolutely could not work?

History Questions
Potential questions:
Did you like your last job?
What did you dislike about your last job?
Did you leave your last job on good terms?
Would your previous supervisor give you a good reference?
Did anything happen at your last position that you wouldn't want a future employer to find out about?
Why did you feel proud of that accomplishment?
Who can help you identify your strengths/weaknesses?
Why do you want to improve on those areas?
Who can help you improve those areas?
How can you tell if you have made progress?

Application Questions

Potential questions:
How can you become more comfortable submitting applications?
Do you usually get calls back after completing online applications?
If you could improve one thing on your applications, what would that be?
Do you have your resume with you?
Has anyone ever provided you with feedback on your resume or cover letter?
Do your references know your work history?
Do your references know you are using them as references?
Do your references have access to a phone/email to respond to employers?
Do your references know your strengths?
Do your references have a copy of your resume?

Interview Questions

Potential questions:
What do you think went well in your last job interview?
What is one thing you would like to improve with interviewing?
How do you practice your responses to interview questions?
What types of questions do you ask in an interview?
Have you ever Googled yourself?
Do you know how to change your privacy settings for your social media accounts?
What type of information do you think employers look for when searching social media?
What would you wear to an interview?
How do you usually get to interviews?
If you had an interview tomorrow, would you be ready? How can we get you ready?

Contact Questions

Potential questions:
How many minutes do you have on your phone every month?
Is the phone number yours alone, or do you share it with another person?
How often do you check your voicemail?
What does your voicemail message say?
What email address do you use on applications?
Do you have different personal and professional emails?
Why do you think a professional email address is important?
Do you get a lot of junk mail in your email box?
Where can you go to check your email?
How often do you check your email?

You all did a nice job coming up with follow up questions to ask when completing the Job Readiness Assessment Page. Ask What questions did you jot down that you want to be sure you ask as a follow up? Let's take a look at our second Polling Question for this training.

Polling Question 2: Job Readiness Page

Directions to Trainer: Pull up Polling Question 2: **Job Readiness** Page. Close out the question after everyone has answered, or after 1 minute has passed. Then, share the results. Use this as a starting point to debrief the previous activity.

For your reference, this is the question:
On a scale of 1 to 10, with 10 being the most valuable, how valuable is it to collect this job readiness information?

- *1*
- *2 or 3*
- *4 or 5*
- *6 or 7*
- *8 or 9*
- *10*

Trainer Instructions to Learners: We will pull up another polling question. This one is about the **Job Readiness** page. Go ahead and select your response, then submit.

If you chose 6 or above please unmute and share your reasoning behind your rating.
Responses will vary; however, we are expecting their rating to be on the high end.

Ask How often would you want to review and/or update this information?
Responses will vary, no specific policy for reviewing, W-2 Policy Manual. 5.2.2

Ask Who determines how often this information is reviewed and used?
Responses will vary

As we stated earlier, you are responsible for the case management process, and the participant is responsible for the outcome. After you collect all this information from participants, you need to use it to assist participants in reaching their goals.

Day 1 Wrap-Up

☼ PPT 24

PG 19

We covered a lot of ground today, from the basics of assessment to the WWP Informal Assessment driver flow and the Informal Assessment Inventory. Tomorrow, we continue to explore assessment by looking at how we make information gathering more conversational and dive into formal assessments.

As we wrap up, we will put you into your breakout rooms one last time. As a group, come up with your top three takeaways from today. You have five minutes to come up with your list. The person who has the largest shoe size will be your spokesperson.

Note to Producer: Put learners into breakout groups of 3-4. Schedule the breakout rooms to end after 4 minutes.

Note to Trainer: When the groups return, have each group report out.

That is all we have for you today. Have a great rest of your day!

Self-Facilitated Introduction: Day 2

☼ PPT 25

Estimated Length: 15 minutes prior to class

Directions to Trainer: Display the slide 15 minutes before class starts. Instruct learners to use their Text annotation tool to answer the question displayed on the screen.

Trainer Instructions to Learners: Use your Text annotation tool to answer the questions on the screen. Feel free to unmute or type in the chat to talk to others about the question.

Day 2 Welcome

☼ PPT 26

Welcome back to day two of W-2 Case Management: Assessment and Employability Plans! Yesterday, we started exploring assessment. We specifically discussed the Case Management process and began discussing the Assessment process by looking at informal assessment. Today, we continue the exploration of assessment by looking at a few different ways of obtaining assessment information and diving into formal assessment. Then, you will get the opportunity to put it all into practice by working with a practice participant.

But first, let's review a few of the topics we covered yesterday by playing a few rounds of Wisconsin Says!

Wisconsin Says

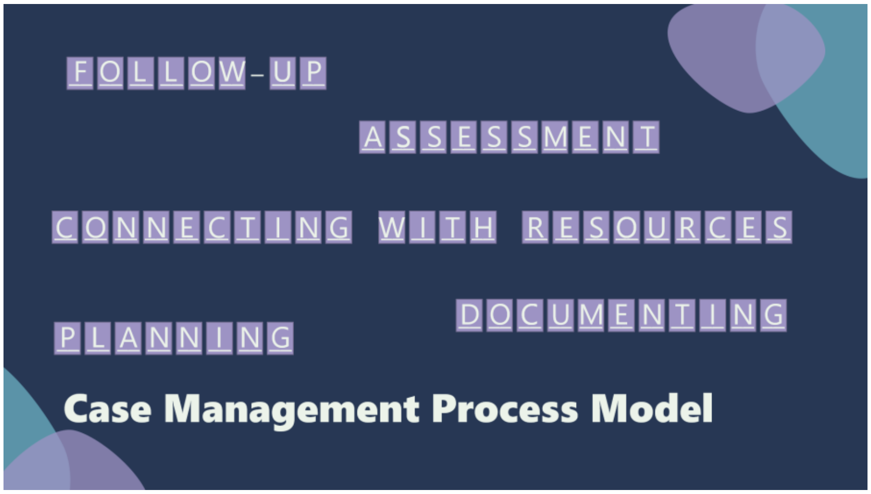
☼ PPT 27

Estimated Length: 5 minutes

Directions to Trainer: Explain the instructions to learners and show the screen. When you see a correct word, click the word in the PowerPoint to reveal the answer to the class. The words do not need to be revealed in a certain order.

Trainer Instructions to Learners: This is similar to America Says on the Game Show Network. There are several blank words on the screen. All the words are associated with the topic at the bottom. Type your guesses for the words in the chat. When someone guesses a correct word, I will reveal it on the screen. Our first round has words associated with the Case Management Process Model. Start typing your guesses.

Click on the blank associated with the correct answer to display the words.



PPT 28

Say Our next round has words associated with the Informal Assessment Driver Flow.

Click on the blank associated with the correct answer to display the words.

We gather a lot of information from the Informal Assessment Driver Flow, Informal Assessment Inventory, and assessment in general. Just as important as what we gather, is **how** we gather it.

Conversational Interviewing

☼ PPT 29

PG 20

"BEST" Approach

It's important that we use a conversational approach, as opposed to conducting an interrogation. The BEST approach is one method of incorporating a conversation into our interviews.

BEST stands for *Balance*, *Exploration*, *Sensitivity*, and *Trust*. As we discuss these, record in your participant guide ways you can use this approach.

Balance: Gather necessary information vs. a commitment to understanding a person's current situation. We need the information we gather; however, are we asking just to fulfill a policy obligation, or also to build understanding?

Exploration: Modify any standard approach to include exploration of basic needs, family circumstances/resources and possibilities. Assessment is not a "mechanical" process. We work with individuals, and our approaches may need to be individualized to be best suited to the applicant or participant with whom we are working.

Sensitivity: Acknowledge the participant's needs, yet be able to challenge them on the functional realities faced personally or by members of their family. You may be the only person who challenges the participant appropriately to step out and take a chance.

Trust: Establish clear roles and responsibilities (the participant's and yours) and lay out a realistic picture of options within W-2 Guidelines.

Conversational Interview Activity

☼ PPT 30

Purpose: Identify BEST Approach strategies heard in the audio recording, documenting examples of each.

Note to Producer: Put the link to the conversational interview in the chat.
https://wss.ccdet.uwosh.edu/Courseware/W2CM_AssessEP/Tara_Converse/Index.html

Trainer Instructions to Learners: To put the BEST approach into context, we put a link in the chat. The link is also in your participant guide. Click the link to listen to a recording of an interview between a W-2 Participant and a FEP. As you listen, record ways you hear the FEP incorporating the BEST approach into her interview style. In your participant guide, document ways the video demonstrates the BEST. Put your favorite color in that chat when you are finished.

Ask In what ways does Tara's interview demonstrate the BEST approach?

Balance:
Possible responses:
Gather information; namely in this scenario, gathering Tara's perspective on her experiences.

Exploration:
Possible responses:
Help Tara explore if there are other possible explanations to what she observes; other perspectives.

Sensitivity:
Possible responses:
Guide the participant to their own aha's.

Trust:
Possible responses:
Provide realistic options and possibilities.

Polling Question 3: "BEST" Approach

Directions to Trainer: Pull up Polling Question 3: "BEST" Approach. Close out the question after everyone has answered, or after 1 minute has passed. Then, share the results. Ask for volunteers to share some tips for doing well with their selected aspect.

For your reference, this is the question:
At which aspect of the "BEST" approach do you feel you are a rockstar?
- *Balance*
- *Exploration*
- *Sensitivity*
- *Trust*
- *I might be a star, but not quite a rockstar yet.*

Trainer Instructions to Learners: Our first polling question of the day is about the "BEST" approach. Select at which aspect you are a rockstar and submit.

Ask How do you plan to use the BEST approach?
Possible Responses: Gather and use the information to assist the participant in reaching their goals, allow the participant to make their own choices when assisting them with options and possibilities

Transition to River of Jobs

Yesterday and today, you have experienced an informal assessment through the Six Word Memoir, reviewed a case management process model, and listened to a conversational assessment model. Now you will experience an activity to put the BEST model into practice with the River of Jobs.

River of Jobs Activity

☼ PPT 31

PG 21

Purpose: To demonstrate an example of gathering informal assessment information through a creative activity. It can be used to build rapport, to gather additional informal assessment details, or as an example of interviewing/information gathering, career exploration, etc.

Materials: None

Estimated Length: 40 minutes

River of Jobs - Part 1 (20 minutes) – Creating Your River - Independently

Directions to Trainer: For 20 minutes, learners work independently, creating their River of Jobs, using the space provided in their participant guide.

Trainer Instructions to Learners: River of Jobs is an activity that can be used to draw out informal and formal assessment information about the participant in a fun and casual format. In just a few minutes, you will experience creating your own river and sharing that river with a partner.

In the space provided in your participant guide, create your River of Jobs. Capture your work and educational history and any volunteer experiences you had. Also think about significant life happenings while you were traveling on your river. Did you get married or divorced, have a child, or move? Maybe you went back to school or earned a training certificate. All of these things have an impact of the direction of your river.

☼ PPT 32

Here is an example of a River of Jobs. The developer of the river included their work experience, education attainment, and major life events. You will have about 15 minutes to work independently on your river. If questions come up you can use the chatbox, or unmute and ask us.

Is there anything I can clarify for you before you begin?

River of Jobs - Part 2 (20 minutes) – Pair Share Your River

PG 22

Directions to Trainer: Learners are paired together to share their River of Jobs. Each learner shares their river and asks clarifying questions about their partner's river. After each learner has shared and had a chance to ask questions, the partners answer the questions in the participant guide.

Trainer Instructions to Learners: Now you will be paired up with someone else to share your river in break out rooms. Each of you will share your river and answer some questions regarding your experience.

When you are the person sharing, you have 4 minutes to share your river. You can hold your river up in the camera to show your partner, describe your river chronologically, or begin with what is most significant to you. This is your river to share as you'd like.

After you've shared, give the listener a chance to ask any clarifying questions about your river.

After both of you have shared, go through the questions in your participant guide to discuss the activity.

If you need any assistance as you go, one of the trainers can pop into the breakout room for assistance. Is there anything you need clarified before we put you into breakout rooms?

Questions in Participant Guide
Ask What challenges did you experience during this activity?

Ask How is this significant to the topic of assessment?
Possible Answers:
- *My partner used a conversational approach to ask questions and get clarification.*
- *This information could be documented in notes or PIN comments in WWP.*
- *This information could help identify action steps such as work sites and education/training activities.*

Ask In what ways might you use this activity with participants?
Possible Answers:
- *I could ask a participant to do this activity in conjunction with a career assessment to compare interests, skills, and abilities.*
- *I could use this as a self-esteem booster to point out to the participant ways they have met goals and completed "hard" things.*
- *This would be a good job club activity when discussing transferable skills, career ladders, etc.*

Transition to Formal Assessment

☼ PPT 33

We spent a lot of time discussing informal assessment, but that doesn't mean formal assessment is not as important. In many cases, formal assessment is essential to learning more about the information discovered during informal assessment.

Formal Assessment

PG 23

Take a few minutes to answer the four questions in your participant guide about formal assessment: What is the purpose, When to offer, How to use, and Where to document. After you finish, we will work in groups to review your responses and the policy for Formal Assessment. Put your favorite fruit in the chat when you are done so we know you are ready to move on.

You've had a few minutes to answer the formal assessment questions. Now, let's work in pairs to determine what the W-2 Manual says about the questions. You have 10 minutes. The person who has the most keys on their keyring will be your designated spokesperson.

Note to Producer: Put learners into breakout rooms of 2-3 learners. Schedule the breakout rooms to end after 9 minutes.

Note to Trainer: As you cover each question in this section, ask the learners for their responses as well as what they found based on searching in the W-2 Policy Manual. Encourage learners to unmute and have a conversation on their findings. There is no need to go over each bullet; just ensure each point is covered, either by the trainer or the learners. The information below the questions is the policy that corresponds with that information.

1. What is the purpose of a formal assessment?

Reference: W-2 Policy Manual 5.5.1

"A formal assessment is the process of establishing:

- *The extent and severity of any disabilities or other conditions (e.g., domestic violence, learning needs, need to care for disabled child) that may interfere with normal functioning in an employment setting or with a person's ability to meet W-2 program requirements;*
- *The effect of a disability or other potential barrier on the person's capacity to obtain and maintain unsubsidized employment, participate in employment-related activities*

(e.g., work training activities or education) or otherwise meet W-2 program requirements;

- *The need for supportive services, accommodations, auxiliary aids or communication assistance;*
- *The conditions under which the person is capable of employment or employment related activities;*
- *The need to make reasonable modifications to policies, practices and procedures when necessary to ensure equal opportunity for people with disabilities; and*
- *The appropriateness of specific assignments in the W-2 program.*

The formal assessment process may include gathering information about the participant from one or more qualified assessment agencies or individuals."

2. Describe the situations when a formal assessment must be offered within 30 days.

Reference: W-2 Policy Manual 5.5.1.1

"A FEP can determine the need for a formal assessment at any point; however, a formal assessment must be offered within 30 calendar days of any of the following situations:

When an applicant or participant presents medical or other information, including the applicant's or participant's own statements that indicate he or she may have a disability or other barrier to participation in the W-2 program or employment; or

1. *When W-2 agency staff or contractors observe behavior that indicates the need for a formal assessment."*

The FEP must offer a referral for a formal assessment in any of the following situations:

1. *When a participant is placed in a W-2 T position. Participants placed in W-2 T must have a formal assessment scheduled and documented on the EP within 30 calendar days of placement into W-2 T; and*
2. *When the results of the WWP Informal Assessment indicate a need for further evaluation for identification of a disability or other barrier to participation in the W-2 program or employment.*

   Note: *When a participant is referred for a formal assessment based on the information discussed during the Informal Assessment, any relevant information must be shared with the assessing agency if the participant signs a release of information.*

When offering a formal assessment, the FEP must:

1. *Document the formal assessment referral date on the WWP **Participant Barriers** page or in the **Family Barriers** page;*
2. *Open a FA – Formal Assessment Pending participation status for participants who agree to a formal assessment (see 6.4.1); and*
3. *Have a formal assessment activity scheduled on the EP within 30 calendar days of the referral date indicated on the corresponding WWP Barrier Details or Family Barriers page."*

3. How do formal assessment results impact case management? How could you describe the formal assessment process to a participant?

Reference: W-2 Policy Manual 5.5.1.2

"The FEP must use the W-2 Formal Assessment Agreement (Form 2565) to help explain to the applicant or participant the purpose of the formal assessment and the type of follow-up services and activities that may result from completing it. It is critical that the FEP explain the formal assessment process using positive language that reinforces how the applicant or participant may benefit from completing it." Through the discussion, the applicant or participant must be made aware that assessment results will enable the individual and their FEP to make informed decisions about:

- *Their W-2 placement;*
- *Their employment goals and the activities that will help reach those goals;*
- *Their ability to engage in training and education; and*
- *Any special services and work site accommodations that she or he may need.*

The applicant or participant must indicate at the bottom of the agreement their decision to complete or decline a formal assessment.

*The FEP must use the best information available from an informal assessment to initially place an individual in an employment position when a formal assessment is pending. Participating in a formal assessment may be counted as participation in an employment position. The FEP must document all formal assessment information in WWP utilizing the WWP **Participant Barriers** page and **Family Barriers** pages, the FA participation status, and the EP, including PIN comments, as appropriate. Remember, PIN comments is not a secure page and confidential information cannot be entered.*

Within 30 days after receiving the results of the formal assessment, the FEP must make necessary adjustments to the participant's placement and revise the EP based on the formal assessment. The services and accommodations that are recommended in the formal assessment to help a participant succeed in a work setting must be incorporated into the participant's EP.

4. Where do you document formal assessment results?

- *WWP **Participant Barriers**, and **Family Barriers** pages*
- *PIN Comments*
- *ECF*
- *Paper File (If used by the agency)*

Assessment is a critical part of case management. It helps us understand not only a participant's barriers, but also the accommodations we can provide so the participant still can participate fully in W-2. The question we are asking is not "What activities can't this person do?" but rather "How can we modify W-2 activities so the person can participate successfully in these activities, even with their disability or barrier?"

Formal assessment results may lead to accommodations. In New Worker Training, you scratched the surface of accommodations. Let's talk about them a little more.

Accommodations

PPT 34

PG 24

According to the U.S. Department of Labor, an accommodation is "an adjustment to a job or work environment that makes it possible for an individual to perform their duties." W-2 Manual 1.3 states that we must provide accommodations to all participants who disclose a disability.

Ask How could you explain the concept of accommodations to participants?
Possible Answers: these will vary. If necessary, rephrase responses in a positive light, such as:

- *I explain to the participant that accommodations can help them participate in activities to reach their goals.*

Ask How do you offer accommodations? Either unmute yourself, or type in the chat.
Possible Answers: these will vary. If necessary, rephrase responses in a positive light, such as:

- *I let the participant know that accommodations can open new options and possibilities for activities that they may not have considered before.*

PPT 35

JAN is the Job Accommodation Network. Their website, www.askjan.org, has information on the ADA, disabilities, and accommodation ideas for those disabilities.

You also can contact JAN via phone, e-mail, or web chat for more help in strategizing accommodations for W-2 participants.

There is an updated chart compiled from using JAN and its resources of different disabilities/impairments and examples of accommodations in W-2 Manual 1.3.3.

Race to Accommodate

Purpose: Learners will get to practice and more familiar with AskJan.org.

Materials: www.askjan.org

Estimated Length: 7 minutes

Trainer Instructions to Learner: AskJan's A to Z Lists are helpful for both you and participants when you are unsure what type of accommodation to provide. We will practice using this feature. When I name a disability, go to www.askjan.org and use the A to Z Lists to find a potential accommodation for that disability. When you have found an accommodation, put it in the chat.

Note to Producer: Put the link to the AskJan website in the chat.

Note to Trainer: Read accommodations aloud as they come into the chat. After responses start to slow down, or 2 minutes have passed, move onto the next disability.

Anxiety
Possible responses: apps for concentration/memory/stress, fidget devices, written instructions, planners, on-site mentoring, checklists, color coded system, modified break schedule

Migraines
Possible responses: air purifier, modified lighting, anti-glare filters, modified workspace

Fibromyalgia
Possible responses: anti-fatigue matting, periodic rest breaks, task separation, ergonomic equipment

After you and the participant identify accommodations, you must document those accommodations on the **Participant Barriers** page in WWP and on the Services and Accommodations to Help You Do Your W-2 Activities form.

Documenting Accommodations

☼ PPT 36

PG 25

📖 Reference: W-2 Policy Manual 5.5.1.2

After you and the participant identify accommodations, they need to be incorporated and documented. W-2 Policy Manual 5.5.1.2 requires that you incorporate services and accommodations recommended in the formal assessment to help a participant succeed in a work setting into the participant's EP. Use the "Services and Accommodations to Help You Do Your W-2 Activities" form (Form 2564) for this purpose. If you do not incorporate all the recommended accommodations or modifications into the participant's EP, the FEP must document on the **Participant Barriers** page the reasons the recommendations were not incorporated.

Keep in mind the following points regarding the Services and Accommodations form (Form 2564) and its purpose:

- Complete the form to show any needed services, activities, and reasonable modifications or accommodations.
- Give a copy to the participant with their EP.
- Scan the form into ECF.
- When updating an EP, review accommodations

☼ PPT 37

Other places we also must remember to document accommodations include:

- Wisconsin Work Programs (WWP)—Accommodation section of the the **Participant Barrier** page of the Informal Assessment.
- Comments—Non-confidential accommodation information must be documented in the PIN comments.
- Electronic Case File (ECF)—Formal assessments, confidential comments, and the Services and Accommodations Form must be scanned in under the correct code.

If there are accommodations listed in WWP, then there must be a Services and Accommodations form completed with the participant and scanned into ECF. Keep in mind it is the W-2 agency's responsibility to ensure the participant receives the accommodations for all their W-2 activities, including in workshops and at work experience sites.

Eyeball Yoga Energizer

Estimated Length: 5 minutes

Directions to Trainer: Read each statement, asking learners to do as you say.

Trainer Instructions to Learners: We have done a lot of looking at a screen today, so we will give our eyes a little break by doing some eyeball yoga.

Everyone close your eyes for 10 seconds.

Now open them really wide.

Squeeze them shut.

Open them again.

Keeping your head still, look to the left.

Look to the right.

Look up.

Look down.

Now make a "Z" by looking upper left, upper right, lower left, lower right.

Make an "N" by looking lower left, upper left, lower right, upper right.

Blink three times, and get ready to take a look at Participation Statuses.

Participation Statuses

PPT 38

PG 26

The results of formal and informal assessments may indicate the participant needs a Participation Status or multiple Participation Statuses entered in WWP. Participation Statuses are factors that may impact a participant's ability to participate in W-2. You must take these statuses into consideration throughout case management, including when you are developing Employability Plans with participants.

There are six Participation Statuses for the W-2 program.

- *CD – Caring for Disabled Child*
- *CF – Caring for Disabled Family Member*
- *EC – Child Care for Employment Skills Training (2 year)*
- *EI – Employer Intervention Services*
- *FA – Formal Assessment Pending*
- *SD – SS(D)I Advocacy/Application*

Now that we have identified the six statuses, we can practice using them.

Name that Status Activity

PG 27

Purpose: For learners to identify the appropriate Participation Status(es).

Materials: None

Estimated Length: 10 minutes

Directions to Trainer: Read the scenario statements to learners and have them use their stamp annotation tool to indicate the appropriate status. After most learners have selected a status, or one minute has passed, clear the annotations and move onto the next scenario.

Trainer Instructions to Learners: Examples of participant scenarios are in your Participant Guide. I will read a scenario and display the corresponding name on the screen. Using your stamp annotation tool, select the Participation Status you believe is appropriate for the participant. Remember, there may be times when participants may need multiple Participation Statuses.

During Billie's initial Informal Assessment, she reports that she has a slipped disc, which limits the type of work she can do. She wants to find a job she can do, and is not applying for SSI/SSDI at this time. You offer for her to complete a formal assessment, and she agrees. Which Participation Status(es) would be appropriate for Billie?

FA-Formal Assessment pending. Due to Billie's need for a formal assessment and agreeing to complete a formal assessment.

Shana is the mother of 6-month-old twins who were born 4 months early. The premature birth left both children with significant heart and breathing problems. Her son has recovered well, and has minimal ongoing medical issues. Her daughter still is experiencing significant issues, and cannot go into a childcare facility. Shana drops off the appropriate documentation. Which Participation Status(es) would be appropriate for Shana?

CD-caring for a disabled child. Shana has twins that have significant medical issue which will affect her participation in W-2.

You and the Job Developer helped Teena get a part-time job as a receptionist two months ago. Yesterday, you got a call from the employer stating that they think Teena is a reliable employee. However, due to her physical limitations, she is unable to complete several of the required tasks. They say they tried talking to Teena about this, but she didn't seem to understand. They say they might have to let her go. You suggest possible accommodations that would enable Teena to complete the required tasks. You also agree to meet with the employer and Teena on a monthly basis to help with communication and other on-site supports. Which Participation Status(es) would be appropriate for Teena?

EI-Employer Intervention Services. Teena is working and you are helping her and her employer resolve a job retention issue.

Marigold has Borderline Personality Disorder and PTSD, which significantly impacts her ability to maintain employment. She also is the sole caregiver of a daughter with Autism. Her daughter frequently gets sent home from school due to behavior issues, and cannot go into a childcare facility. There is a Caring for Disabled Child form completed in ECF for her daughter. Marigold calls and reports that she was fired from her 6th part-time job this year. She states she feels like she will never find a job that will work for her, and decided to apply for SSDI with the help of the Aging and Disability Resource Center. Which Participation Status(es) would be appropriate for Marigold?

CD-Caring for a Disabled Child. Marigold's daughter has behavioral issues which may affect her ability to participate. The child is unable to go into a childcare facility and has gotten the Caring for Disabled Child form completed.
SD-SS(D)I Advocacy/Application. Marigold is in the process of applying for SSDI and Aging and Disability Resource Center is assisting her.

Now with adding participation statuses to your case management practice we are going to take some time now and apply some of the information we have covered so far in this class.

Practicing Assessment

PPT 39

Practice Scenarios

PG 49 (Appendix B)

Purpose: Learners evaluate what information should be documented in WWP.

Materials: None

Estimated Length: 30 minutes

Directions to Trainer Part One: Read the trainer statement or questions aloud, then click to hear Arya's responses. Instruct learners to complete the Practice Scenario Worksheet in their PG.

Trainer Instructions to Learners Part One: Over the past two days, we have discussed the informal assessment driver flow in WWP, formal assessments, Participation Statuses, and documenting assessment information. Now it is your chance to identify information you would record in WWP. In a moment, you will have the opportunity to meet Arya. As you listen to her story, record what you would document in WWP on the provided Practice Scenario Worksheet in your participant guide. You will have the opportunity to share what you recorded in small groups after listening to her story. What questions do you have before we get started?

Trainer: Welcome Arya. I'm going to ask you some questions so I can get to know you a little better. Your answers will help both of us determine how the W-2 program can help you and what services you may benefit from. First, tell me about yourself.

Arya: Well, I'm 23. My son, Robbie, is my world. He just turned four, and I honestly don't know where the time went! It seems like just yesterday he was a baby. We live with my mom. It is super convenient to have a live-in babysitter. Plus, she is cheap, which is nice considering I left my job six weeks ago. I have been looking for a new one ever since then, but haven't had any success. I guess I just don't know what to do any more. I got help from W-2 when Robbie was first born, so I figured I would give it another shot.

T: You came to the right place! Helping you find a job is just one of the many services W-2 can help you with. I see that you selected for your correspondence to go out in English. What language do you use at home?

A: I only know English. I think it would be really cool to know a different language though. I took a German class in high school, but I don't remember any of it. My friend said her daughter started learning Spanish in Kindergarten. Robbie starts Kindergarten next fall, so maybe I will learn with him.

T: That would be a fun way to spend time together! You mentioned that you are unemployed and left your job six weeks ago. Tell me more about that.

A: I was working as a Personal Care Attendant at the local nursing home for the past two years or so. I mostly worked with the residents doing things like bedside personal hygiene, administering medications, and helping with meals. I also helped maintain their records, cleaned and disinfected equipment, and did the laundry. It was a decent job. I got consistent full-time hours, earned paid time off, and had medical insurance. The pay wasn't bad either. I earned $9.90 when I first started, and worked my way up to $11.90 before I left. Plus, I really liked working one-on-one with the residents; most of them were so sweet. I was sad to say goodbye to them.

T: It sounds like you enjoyed that position. Why did you leave?

A: Staffing started becoming a real issue. People kept leaving or not showing up for their shifts. I had to keep picking up additional duties and work overtime to cover for

everyone else. I spent less and less time with the residents, and all the shortages started causing me a lot of anxiety. As much as I liked it, I decided I just couldn't handle the stress anymore. That has been one of the tough things looking for work because I don't want to return to a health care field, and that is what I am most qualified in.
T: You have a lot of experience with all aspects of working in a nursing home. We can look at how those skills could transfer to other positions. What other qualifications do you have?

A: Last time I was in W-2, I got my HSED and my Personal Care Worker certification. That really helped me get my foot in the door with the nursing home. I know that I was going to take one of those tests that tells me what kinds of jobs I should do last time, but I got a job so quickly I didn't have time for it. Do you still do those?

T: Yes, we do! We can use the career assessments to explore some career paths based on your interests, skills, and work styles.

A: That would be great because I'm stumped what to do.

T: Great, I'll make note of that, and we can loop back to scheduling the career assessments in just a bit. You also mentioned that you are living with your mom right now. How is that going?

A: Ugh, a nightmare! I have to keep reminding her that I am Robbie's mom, not her. I much preferred when we had our own place, but I couldn't afford it anymore when I left my job. The upside is that she doesn't make me pay rent, which is nice. Technically, I'm not supposed to be there because I'm not on the lease. Her landlord found out and told me I need to get out. We explained the situation to him, and he gave me six weeks to find a place of my own.

T: What other housing options do you have?

A: I put my name on the wait list for a few low-income housing apartments, but haven't applied for any other places. I was waiting until I nailed down a job and had some income. Now that I will have a W-2 check, I am going to put in apps for a few different places. I have a license and my own car, so I don't need a place on the bus line or right in town. That really helps me keep my options open.

T: Okay. You also mentioned that you had some issues with stress and anxiety at your last position. Tell me more about that.

A: It wasn't anything that was ever officially diagnosed. Just an overall feeling, you know? As long as I find a less stressful job moving forward, I don't think it will be an issue.

T: All right. If it does become an issue again, let me know. We can look at what accommodations you may need to help you succeed. I know that your mom usually watches Robbie. Will there be any changes to that arrangement after you get your own place?

A: Probably not. She has always watched him, even when I was working. Daycare is so expensive! Although my friend, the one whose daughter is learning Spanish, gets daycare assistance to help with the cost. I might look into that to keep my options open.

Directions to Trainer Part Two: Divide learners into groups of 3-4. Put learners into their breakout room, and give the groups about 5 minutes to share their observations. When they get back from the breakout rooms, go through the worksheet to ensure everyone has the basic information.

Expected responses:
Languages-English
Work History-personal care attendant at a nursing home, very stressful, doesn't want to work in the healthcare field, she did like one on one time with the residents
Work Programs-none
Education History-HSED
Post-Secondary Education- personal care attendant certification
Military Service-none
Housing-Arya lives with her mother, but it is stressful, on the waitlist for low income housing
Transportation-she has her driver's license and a car
Legal Issues-none
Participant Barriers-stress
Children and Youth Supports- she has a four year old son Robbie, her mom provides inexpensive CC
Family Barriers-none
Non-Custodial Parent-none
NCP Referral-none

Trainer Instructions to Learners: That's all the information Arya is providing us right now. We will continue working with her throughout the remainder of training Take a moment to jot down any last notes you may have. We will put you into breakout room to compare your notes with your group. You have five minutes. After the five minutes you will return to the large group, and we will go through these Informal Assessment pages and review what information you have gathered from the scenario.

Note to Producer: Put learners into breakout rooms of 3-4 learners. Schedule the breakout rooms to end after 5 minutes.

Now that you are back let's go through these Informal Assessment pages and review what information you collected from the scenario.

Polling Question 4: Pick Your Assessment

Directions to Trainer: Pull up Polling Question 4: Pick Your Assessment. Close out the question after everyone has answered, or after 1 minute has passed. Then, share the results. Ask for volunteer to share why they picked that assessment.

For your reference, this is the question:
If you had to choose only one assessment to complete with participants, which assessment would you choose?

- *Informal*
- *Job Readiness*
- *Career*
- *Formal*

Trainer Instructions to Learners: Thankfully, we are not limited to just informal assessments when working with participants. We continue working with Arya tomorrow and get more assessment information for her. However, let's pretend for a few minutes that we can pick only one assessment to complete with participants. Which would you choose? Select your response, then submit.

Ask for volunteers to share why they selected that assessment.

Assessment – Putting it Together

PPT 40

PG 28

We've spent the past two days learning about assessment, and now we just put our assessment skills into practice working with Arya. Next, let's pull from what we've learned by reviewing some key concepts. You can follow along, and shout out your responses or type them in the chat, as we move through these statements. Fill them in your participant guide as we go through these.

Assessment is a *process*, not a *solution*.

Assessment should impact *case management*.

W-2 policy requires *formal* and *informal* assessments.

Informal assessment is not an *interrogation*.

Good informal assessment *engages* the participant.

The end product of an assessment is *information*.

Assessment is more than what is listed on a *form*.

☼ PPT 41

Assessment should be done when there is a *need* for *information*.

Always *document* the difference that assessment results make in case management.

Assessment is *ongoing*.

A participant cannot be *sanctioned* for failing to cooperate with a formal assessment.

The success of assessment is not just getting the information, but what you *do* with the information.

Day 2 Wrap-Up

☼ PPT 42

PG 29

Directions to Trainer: Divide learners into three breakout rooms. Have each group come up with a list of their top ten things to remember about Assessment. Then, have each group report out their list.

Trainer Instructions to Learner: We will close out the day by putting you back into breakout rooms. Work together to come up with a list of your top ten things to remember about assessment. You will have seven minutes. The person with the most legs in their household (human or pet) will be the designated scribe and spokesperson.

Note to Producer: Put learners into three breakout rooms. Schedule the rooms to close after 6 minutes.

Tomorrow, we will begin to look at how assessment results lead to action and the creation of the Employability Plan. Have a great rest of your day!

Self-Facilitated Introduction: Day 3

☼ PPT 43

Estimated Length: 15 minutes prior to class

Directions to Trainer: Display the slide 15 minutes before class starts. Instruct learners to use their Text annotation tool to answer the question displayed on the screen.

Trainer Instructions to Learners: Use your Text annotation tool to answer the questions on the screen. Feel free to unmute or type in the chat to talk to others about the question.

Day 3 Welcome

☼ PPT 44

Welcome back. So far, we covered assessments, both informal and formal. You experienced several activities to show different ways to gather informal assessment to gather information- River of Jobs, Arya's scenario.

Let's have 2-3 of you share how you could use any of the activities, or variations of them, with a participant.

Using the information we discussed yesterday, you now can identify and evaluate various types of informal assessment information and what you should document in WWP.

☼ PPT 45

Along with the information from yesterday, and as part of a practice scenario later today, we will be looking at a Career Assessment. A couple of key points about Career Assessments, you must offer career assessment to all applicants, and must schedule it within 30 days of application and complete it within 30 days of placement. You may need to complete one or more career assessments to obtain a greater awareness of an individual's work styles, skills and interests. Agencies have discretion over which career assessments they use.

The career assessment we will be using with our scenario is the CareerOneStop. The CareerOneStop is the career, training, and job search website for the U.S. Department of Labor. Each of your individual agencies may use different career assessments that cover all three elements of a career assessment.

In the chat box, type which career assessments you or your agency uses.
Possible responses: JIST, Career Cruising, Career Locker, Career One-Stop, Traitify, Cognofile
Another assessment we use with the practice scenario is an Educational Needs Assessment, to determine if the participant needs, or would benefit from, education and training activities. This assessment must identify the participant's current educational levels and determine the participant's educational and training needs.

In our practice scenario, you are provided with the participant's TABE results. The TABE stands for Test of Adult Basic Education, and is the most used educational needs assessment in W-2.

How do we use TABE results? Type your answer in the chat.
Possible responses: appropriateness for technical college; the need for adult basic education including literacy skills and remedial math and reading courses.
Before we dive back into our scenario, let's take a deeper look at the why, how and who of goal setting.

Goal Setting

☼ PPT 46

🗎 PG 30

The assessment information you gather is used in a myriad of ways. Goal setting is just one area where assessment information is helpful.

Ask How do you define goal setting?
Possible Answers:
- *Answers will vary*

Ask Why is it important to set goals with participants?
Possible Answers:
- *To ensure participants get to where they want to be*
- *To accomplish something that is important to them*
- *To stay on track*
- *To support participants in making choices instead of leaving things to chance.*
- *To know where the participants want to be, to focus*

How to Formulate Goals: SMART Model

☼ PPT 47

🗎 PG 31

The SMART method can help both you and the participant formulate their goals. SMART stands for:

Specific	Target a specific area for improvement What does this goal involve?
Measurable	A way of gauging progress or attainment What steps will the participant need to complete along the way?
Attainable	Can be attained through time, energy, and effort With what I have now, or what I'm obtaining soon, will I be able to complete this goal?
Relevant	Meaningful to the participant

	Is this important to me? Why?
Time-Based	A target date or deadline to give a sense of urgency When should this goal be completed?

Ask What is your role in helping participants set goals?
Possible Answers:

- *To act as a sounding board for the participant*
- *To be a partner in the process, not the creator of the goal*
- *To be an encourager*

Discussion Questions:

- Who decides if goals are attainable, relevant, etc.?
  - *Possible Answer: The participant.*
- How can Labor Market Information influence goal setting?
  - *Possible Answer: If the participant is interested in a job that just isn't available in their area, that job goal may not be attainable.*
- How might goal setting involve some "sales" work on your part?
  - *Possible Answer: Goals can be difficult to set and intimidating (especially if they are life changes goals). Part of the "sales" work may be assisting the participant in breaking up the goal into smaller, more manageable steps.*

Personal Practice

Purpose: Learners practice assisting someone in formulating a SMART goal.

Materials: None

Estimated Length: 15 minutes

Directions to Trainer: Challenge learners to help a partner create a job, career, or education-related goal for themselves that meets the "SMART" criteria. Have them select something that's not too personal, but still be legitimate so they have to think through it. Debrief by discussing the process they used, not necessarily focusing on the goals as the finished product for this portion.

Trainer Instructions to Learners: Setting goals is a big part of what you do. I'll pair you with a partner. Assist your partner in creating a SMART goal for themselves. This can be a job or education related goal. Ensure your goal is something that you would be willing to share with someone else. Afterward, we will debrief the process you used as a large group. You have 7 minutes to complete this activity.

Note to Producer: Put learners into groups of 2 in breakout rooms. Schedule the breakout rooms to end after 7 minutes.

Ask Debrief Questions:

- How did it feel to set a goal for yourself?

- What was it like to assist someone else with the goal setting process?
- What approach did each of you take in the goal setting process?
- In what ways does the final goal meet the SMART goal criteria?
- How likely are you to work toward this goal?
- From this goal setting process, what can you take with you when working with participants?

Goals within the W-2 Program

PPT 48

PG 32

Reference: W-2 Policy Manual 6.1.1

Goals play a big part in Employability Plan development. You'll see this referenced in W-2 Policy Manual, Chapter 6.1.1. There are several types of goals you develop with participants using their assessment results.

Primary and Secondary Employment Goals

These are short-term goals, which include the employment outcome the participant is striving for during their participation in W-2. The Primary Employment Goal should be the participant's main field of interest, and the Secondary Employment Goal should be the participant's back-up field of interest.

If the participant is not sure of a specific job title, start with a broad field of interest or industry sector. Then, use career assessments and exploration to help the participant identify specific job titles. After completing the assessments, come back and update these goals. These should not be decided for the participant, and can be based on many more things than just what kind of work a participant may have done in the past.

Other Program Goals

These are concrete short-term goals or outcomes that the participant must achieve through program participation in order to move in the direction of their employment goals. This may involve completing education or training courses, acquiring work experience, or overcoming a barrier.

Long Term Career Goal

These goals are part of the participant's longer-term career plan. Keep in mind that the participant's employment goals and Other Program Goals should fit into this longer-term career plan.

Personal Goals

These goals are important to the participant, but are not required for W-2 participation. They are goals set by the participant that will strengthen the family and empower the participant to achieve their employment goals.

Polling Question 5: Goal Types

Directions to Trainer: Pull up Polling Question 5: Goal Types. Close out the question after everyone has answered, or after 1 minute has passed. Then, share the results.

For your reference, this is the question:
What type of goal are you most comfortable creating with participants?
- *Primary Employment Goal*
- *Secondary Employment Goal*
- *Other Program Goal*
- *Long Term Career Goal*
- *Personal Goal*

Trainer Instructions to Learners: Our first polling question of the day is about the goal types. Select which goal type you are most comfortable creating with participants and submit.
Ask What steps can you take to become more comfortable with the other goal types?
- *Practice creating goals on own/with co-workers*
- *Develop follow-up questions to ask participants to help them identify their other goals*
- *Ask co-workers and/or supervisors to review goals you create with participants and provide feedback on how to improve*

Goal Description

The goal description is used to describe the specific goal. It is a best practice to use the SMART Model to describe the goal. The description will help in identifying the goal steps, next.

Goal Steps

☼ PPT 49

We add Goal Steps for each goal to map out the smaller, more manageable steps or tasks participants need to complete to achieve their goals. They do not need to mirror activities, but rather show participants the journey they need to take to get to their goal.

Goal Steps Energizer

Estimated Time: 5 minutes

Directions to Trainer: Read each Goal Step below. Learners give a thumbs up reaction if they believe it is an example of a good Goal Step, and a thumbs down reaction if the Goal Step needs some work. If there is some disagreement, explain why the Goal Step either is good or needs work.

Trainer Instructions to Learner: Before we get some practice setting goals with our scenario, let's look at examples of some Goal Steps. I will read several examples of different steps. If you believe it is an example of a good Goal Step, use the thumbs up reaction. If you believe the example needs some work, give a thumbs down reaction.

The **Goal Name** for this goal is Activities Assistant. The **Goal Description** is the participant enjoys doing activities with her current client and would like to explore other part-time opportunities in this field. She thinks working as an Activities Assistant in an Assisted Living or Nursing Home Facility would be a good fit.

Goal Steps
Look for jobs. *Down*

Research activities assistant jobs in a 15-mile radius. *Up*

Complete interviews. *Down*

Partake in informational interview with an Activities Assistant by the end of next month. *Up*

Apply for positions. *Down*

Get hired. *Down*

Volunteer at a facility at least two times per week to gain hands on experience. *Up*

Goal Setting Practice Scenario

PPT 50

PG 50-54 (Appendix C & D)

TN Appendix C (101-104)

Purpose: Learner's practice using assessment results to create goals.

Materials: None

Estimated Length: 40 minutes

Directions to Trainer: Groups use the career and educational needs assessment information provided to complete only the goals sections of the Employability Plan Worksheet found in PG Appendix. Give groups 20 minutes to work. After time is up, have groups report out the goals they came up with. Record the goals on the PPT as they are reported out.

Note to Trainer: These groups should be the same as the Activity: Practice Scenario groups, and will remain the same for all future activities associated with this scenario.

Trainer Instructions to Learners: Let's use all the assessment information that we have about Arya to work in groups to create some goals for Arya. Remember, in the real world this would be done with Arya not for or to her. In a moment, we will return you to your practice scenario breakout rooms from yesterday. In your groups, review Arya's career and educational needs assessments. Then, use ALL the assessment information you have so far to create goals for Arya. You should create at least one goal for each Goal Type. Use the Employability Plan Worksheet in the Participant Guide Appendix to write these goals down. You have 20 minutes. The person who is the tallest will report out the goals your group came up with and the rationale for those goals.

Note to Trainer: Rotate through the breakout rooms to review the goals groups are coming up with.

Note to Producer: Put learners into breakout rooms of 3-4 learners. Schedule the breakout rooms to end after 20 minutes.

After the breakout groups return to the large group, go through each goal type and allow each breakout group to share the goal they came up with and why.

Debrief Ask the learners the following questions
- What stood out to you in this exercise?
- What challenges do you have with goal setting?
- What might be the outcome if you don't do goal setting with the participant?
- What ways will you start using what you learned about goal setting next week?

The next step in employability planning is to consider employment.

Employments

PPT 51

PG 31

Remember to consider any employment the participant has when scheduling other activities. Do not schedule any activities during the time the participant is working. Ensure the participant's total hours do not exceed 40 hours a week.

Engagement in Activities

☼ PPT 52

PG 33

When deciding with the participant in which activities they will engage, be sure the activities tie into the participant's goals and assessment results

Tying Goals to Activities

Ask How can activities help participants reach their goals?
Possible Answers:

- *Help gain education in the field they are interested in*
- *Get experience in the field they are interested in,*
- *Prepare them to be successful after they get to the position (job readiness),*
- *If activities are tied to a participant's goal, the participant will be more likely to engage in that activity to make progress toward their goal.*

Ask How can tying goals to assigned activities help keep participants engaged?
Possible Answers:

- *Matching work experience sites to employment goals assists in developing relevant skills*
- *Explain/point out how the activities assigned are steps toward a goal*
- *Tying assigned activities to goals provides participants the "what's in it for them"*

Activities

☼ PPT 53

Activities are the action step of the assessment process model. The activity section of the EP includes the specific activities the participant has agreed to complete in order to achieve their goals.

Each activity must include:

- The activity to be completed.
- An activity description to ensure the participant fully understands what the activity involves.
- The provider of service and activity location.
- The activity schedule(s). This includes a planned begin and end date, the specific days of the week, and the specific number of hours on each day that the activity is assigned.
- Any additional remarks to assist the participant.

Writing for the Participant Activity

Purpose: Learners select examples of better information to include in the various fields on the **Activities** page to help participants succeed.

Materials: None

Estimated Length: 5 minutes

Directions to Trainer: Bring up examples of possible entries for the various fields on the **Activities** page. Instruct learners to use their annotation stamp tool to select the example they believe is better. Wait until most learners have stamped on the screen, or one minute has passed. Then, inform learners of the correct answer. Clear annotations before moving onto the next set of examples.

Trainer Instructions to Learners: Simply including each of these items meets policy, but it doesn't always assist participants. It is important to include detailed and specific information so that participants know what they should be doing, and when and where they should be doing it. In a moment, I will pull up two examples of what you might enter for each of the items an activity must include. criteria. Use your stamp annotation tool to select the one you feel is the better example of what participants benefit from the most.

Up first are activity descriptions. Which one is the better example?

Say 'Complete independent job search. Focus search on positions in an office setting within a 10-mile radius' is the better example. It tells participants what they should be doing, provides the specific type of jobs they should be applying for, and where those jobs should be located.

Next are the provider and service location. Which one is the better example?

Say NWSCA Food Shelf on 3rd street in Ashland with the phone number is the better example. It tells participants the exact name of the provider, where the provider is located, and how to get ahold of them.

Now let's look at activity schedules. Which one is the better example?

Say The example that includes a begin time and end time is the better example. Remember, a Daily Schedule prints for participants with their EP to outline what they must do each day, so it is important to include a detailed schedule for each activity when known.

Last, but not least, are additional remarks. Which one is the better example?

Say 'Remember to bring updated resume with you and dress professionally' is the better example. It reminds participants what actions they need to take prior to attending Job Club. While the other example is a good reminder, there will be someone at Job Club to remind them to sign then.

Find Something That… Energizer

Time: 5 minutes

Directions to Trainer: You will state a part of the EP, and learners must find something around them that is associated with or represents that part of the EP. They have one minute. After time is up, have learners turn on their webcams to show the item or type it into the chat. Repeat until you have covered all three parts of the EP discussed in class so far.

Trainer Instructions to Learners: Before we dive into looking at the different activities participants may be engaged in, we will take a few minutes to move around a bit. In a moment, I will call out a part of the EP. Your task is to look around your area and find something that is associated with or represents that part. You have one minute. After a minute is up, turn on your webcams and show us the item. If you cannot turn on your webcam, you can type the item you found in the chat.

Find something that is associated with or represents employments.
Possible items:
- *Business card*
- *Name badge*
- *Cell phone (to receive or make calls; to record attendance)*
- *Paycheck stub*

Find something that is associated with or represents goals.
Possible items:
- *Journal*
- *Vision board*
- *Trophy*
- *Picture*

Find something that is associated with or represents activities.
Possible items:
- *To do list*
- *Pen and paper*
- *Planner/notebook*
- *Log book*
- *Calendar/Schedule*

Thank you all for your participation! Now that we have identified items that represent activities in general, let's brainstorm some specific activities participants can do to achieve their goals.

Activity Codes

PPT 54

A few minutes ago, we looked at examples for the **Activity Description**, **Activity Location**, **Activity Scheduler**, and **Additional Information** sections of the **Activity** page. But, what about the **Activity** field? In this field you document the activity code associated with the assigned activity. W-2 has a lot of codes to choose from and you can find definitions of each code in the W-2 Manual Appendix. You may have noticed that a lot of the codes are similar in nature. The details you include in the other sections of the **Activity** page help you choose the correct code based on the code definitions.

The first group of codes you see in the W-2 Manual Appendix is the assessment-related codes. Use these codes when participants have a scheduled appointment to complete a formal assessment for themselves or another family member. Assessments may be related to AODA, learning disability, medical, mental health, or domestic violence issues. There are two important things to keep in mind when using these activity codes. First, you identified a potential barrier and documented this on either the **Participant Barriers** or **Family Barriers** page. For a participant barrier, you also created a barrier page and indicated that you referred the participant for an assessment. Second, participants with an open assessment activity cannot be sanctioned per W-2 policy.

Ask What questions do you have about assessment activity codes?

Next, we'll spend time talking about commonly used activity codes and how to determine which one to use when.

Analyzing Activities

PPT 55

PG 34-35

Purpose: Learners identify similarities and differences for commonly used and confused activity codes when matching codes with activity descriptions.

Materials: None

Estimated Length: 50 minutes

Directions to Trainer: Create four groups. Put group numbers and learner names in the chat. One at a time ask each group to pick a gift displayed on the screen. As the teams pick their gift, **click** the chosen gift to reveal a set of three activity codes that the group will use for the first part of this activity. Groups will identify at least one key similarity and difference among their assigned codes, using the W-2 Manual Appendix. Put groups into breakout rooms for a total of 10 minutes.

After the groups return to the main room, pick a group to report and encourage learners to complete the corresponding charts in their guide. After a group reports out, move on to sample activity descriptions for those codes, instructing learners to use their stamp annotation tool to indicate which activity description best matches the activity code on the screen. If learners match the codes and descriptions correctly, acknowledge this and move on. If not, add some clarification as to why certain codes are correct. Repeat this process for the three remaining sets of codes.

Then move to round two, allowing groups to pick a gift to display their codes, sending them to breakout rooms, reporting out, and choosing activity descriptions.

PG 34

Trainer Instructions to Learners (Round 1): We've divided you into four groups. Take a look in the chat to note which group you are in. In a moment, we'll ask you to select a gift on screen, revealing a set of three activity codes. While in breakout rooms with your group, use the Activity Codes section of the W-2 Manual Appendix to review the definitions for each of your assigned codes. Identify one key similarity and one key difference for your set of codes and note this in the chart in your Participant Guide. You do not need to think of an example activity for each code just yet, as we will come back to this later. The person who has worked in W-2 the longest will be the scribe and spokesperson for your group.

☼ PPT 56

Now let's determine the codes for your group. When I call on your group, select one of the gifts on the screen, and we will reveal your set of activity codes. Be sure to note which set of codes your group revealed.

Note to Trainer: Repeat until all teams have their codes. Keep track of which codes each group has. Put the link to the W-2 Manual (https://dcf.wisconsin.gov/manuals/w-2-manual/Production/default.htm) in the chat prior to sending learners to break out rooms.

Now that you have your codes, we will send you to breakout rooms for 10 minutes. We've put the link to the W-2 Manual in the chat. You can find the list of activity codes in the Appendix. Is there anything I can clarify before we send you out?

☼ PPT 57

Welcome back! Now let's hear the key similarity and difference for each set of codes.
BE/GE/HE
Possible Responses:

- *Similarities: Classes that focus on education fundamentals for the purposes of increasing knowledge or gaining a secondary education credential. They all allow for one hour of unsupervised study time for each hour of class time.*
- *Differences: BE focuses on increasing academic functioning needed for employment. BE does not result in a certificate or diploma. GE prepares individuals for the GED test, which does not include all high school credits. HE prepares individuals for HSED tests, which involves more tests than the GED. An HSED is the same as having a high school diploma.*

☼ PPT 58

Thanks for sharing! Before moving to the next set of codes, let's review an activity description and select which of these three codes it belongs to. When the activity descriptions display on the screen, use your stamp annotation tool to select the correct activity code to use for that activity.

Click to display the activity descriptions, then after learners are done annotating, **click** again to display correct answers.

Complete classes and study time to increase math skills in preparation for tech school placement exam.
Answer: BE

Complete classes and study time to prepare for high school equivalency exams.
Answer: HE

Complete classes and study time to prepare for a general education certificate.
Answer: GE

Ask Who has an example of other activities you've seen on an EP that fit under these codes to share with us?

[clear annotations]

☼ PPT 59

Let's move on to the group assigned the CA, CM, and FC codes. Share your key similarity and difference with us.

CA/CM/FC
Possible Responses:

- *Similarities: Professional counseling/treatment that a participant attends.*
- *Differences: CA is for AODA-specific counseling directly for the participant. CM is for mental health counseling directly for the participant. FC is for a family member's counseling that the participant must attend.*

☼ PPT 60

Now we'll see activity descriptions that align with each of these codes. Use your stamp annotation tool to select the correct activity code to use for that activity.

Click to display the activity descriptions, then after learners are done annotating, **click** again to display correct answers.

Attend joint counseling sessions with your daughter.
Answer: FC

Attend counseling appointments for continued addiction recovery.
Answer: CA

Attend counseling appointments to work on coping strategies for general life challenges.
Answer: CM

Ask Who has an example of other activities you've seen on an EP that fit under these codes to share with us?

[clear annotations]

☼ PPT 61

ES/JS/WE
Possible Responses:

- *Similarities: All activities could be targeted to a specific field of interest. Career assessment help define these activities. Help participants become good job candidates.*
- *Differences: ES is used when seeking employment independently or with the help of agency staff. JS is learning new skills in a specific field that results in a certification. WE is preparing for employment by practicing soft and technical skills through a worksite.*

☼ PPT 62

This brings us to another set of activity descriptions. Use your stamp annotation tool to select the correct activity code to use for that activity.

Click to display the activity descriptions, then after learners are done annotating, **click** again to display correct answers.

Gain data entry skills by participating in work training at a local business.
Answer: WE

Gain data entry skills by completing the training certification program.
Answer: JS

Connect with local employers in the data entry field to learn about and apply for job openings.
Answer: ES

Ask Who has an example of other activities you've seen on an EP that fit under these codes to share with us?

[clear annotations]

☼ PPT 63

LF/PA/PD
Possible Responses:
- *Similarities: All codes may be used for certain support groups. Focus on participant's personal growth in areas such as budgeting, nutrition, and parenting.*
- *Differences: LF focuses on life skills activities in a structured setting to help participants succeed in the workforce. PA and PD do not need a structured setting and aren't necessarily tied to succeeding in the workforce. PA focuses on learning effective parenting skills. PD focuses on healthy lifestyle activities.*

☼ PPT 64

Let's take we just learned from this group and apply it to this set of activity descriptions. Use your stamp annotation tool to select the correct activity code to use for that activity.

Click to display the activity descriptions, then after learners are done annotating, **click** again to display correct answers.

Use the tools on myplate.gov to complete a weekly meal plan that focuses on nutritious dinners for the whole family.
Answer: PA

Use the tools on myplate.gov to create a personalized food plan to help you lose weight.
Answer: PD

Attend the Establishing Healthy Eating Routines by Using MyPlate workshop.
Answer: LF

Ask Who has an example of other activities you've seen on an EP that fit under these codes to share with us?

[clear annotations]

As you can see, a few words can make a difference when selecting the correct activity code. Earlier we talked about writing activity descriptions for the participants to ensure they know their exact assignments. Notice we didn't just say "take classes" or "attend counseling". Adding more details to the descriptions also helps you determine which activity code to use and assists agency or state staff when monitoring your cases.

☼ PPT 65

PG 35

Trainer Instructions to Learners (Round 2): You may have noticed another chart on the following page of your participant guide. That's because we have four more gifts with new sets of codes. Like before, you'll work with your group to find a key similarity and difference for your set of codes. The person who has worked in W-2 the least amount of time will be the scribe and spokesperson this time around.

When I call on your group, select one of the gifts on the screen, and we will reveal your set of activity codes. Be sure to note which set of codes your group revealed.

Note to Trainer: Repeat until all teams have their codes. Keep track of which codes each group has.

Now that you have your codes, we will send you to breakout rooms for 10 minutes.

☼ PPT 66

JS/TC/TT
Possible Responses:
- *Similarities: Education based, resulting in a certificate, diploma, or degree. Tied to a specific occupation. Allows participants to gain skills needed for employment. Must consider study time.*

- *Differences: Job Skills Training is short-term (40-516 hours in length), and the W-2 agency is involved in arranging the training with the participant. Technical College is for participants enrolled full-time in a program through a WI Tech College that takes 1-2 years to complete. Additionally, the participant must be employed or assigned to 25 hours of work activities each per week. Tech College Study time can only be assigned if TC is also assigned and is included in the 25 hours of work activities per week.*

☼ PPT 67

We are going to continue applying what we learn about each set of codes in round two by looking at activity descriptions. Use your stamp annotation tool to select the correct activity code to use for that activity.

Click to display the activity descriptions, then after learners are done annotating, **click** again to display correct answers.

Attend administrative professional classes at the local technical college.
Answer: TC

Complete study time for assigned classes.
Answer: TT

Attend CNA classes at the local technical college.
Answer: JS

Ask Who has an example of other activities you've seen on an EP that fit under these codes to share with us?

☼ PPT 68

MP/PD/PR
Possible Responses:
- *Similarities: Participant is working to improve their quality of life. Could be completed individually or by working with a support person, group, or a provider.*
- *Differences: Ongoing Medical/Personal Care is used for participants with ongoing medical appointments or who are facing a medical or mental health barriers that will last longer than six months certified by a licensed provider. Personal Development are activities that a participant wants complete to promote a healthier lifestyle. Physical Rehabilitation must be determined to be medically necessary, anticipated to last six months or less, and aid the individual in returning to work.*

☼ PPT 69

Let's take a look at the activity descriptions for these codes. Use your stamp annotation tool to select the correct activity code to use for that activity.

Click to display the activity descriptions, then after learners are done annotating, **click** again to display correct answers.

Go to the YMCA three times a week to partake in fitness classes of your choosing.
Answer: PD

Attend monthly appointments with doctor to manage chronic pain.
Answer: MP

Complete aquatic therapy at the YMCA two times per week with physical therapist.
Answer: PR

Ask Who has an example of other activities you've seen on an EP that fit under these codes to share with us?

☼ PPT 70

CE/JR/MO
Possible Responses:
- *Similarities: These codes are designed to help participants develop skills to assist them in successfully preparing for and maintaining employment.*
- *Difference: Career Planning and Counseling activities are related to career assessments and guidance in career planning. Job Retention Services are provided to participants who are working to help them maintain their unsubsidized employment. Job Readiness/Motivation focuses on engaging participants in activities centered around preparing participants for work.*

☼ PPT 71

Here's the activity descriptions for these codes. Use your stamp annotation tool to select the correct activity code to use for that activity.

Click to display the activity descriptions, then after learners are done annotating, **click** again to display correct answers.

Meet with the HR Director at Kohler to complete an informational interview.
Answer: CE

Attend weekly appointment with Job Developer to create resume and develop interview skills.
Answer: MO

Touchbase with W-2 Case Manager on Wednesdays at 4pm to discuss employment.
Answer: JR

Ask Who has an example of other activities you've seen on an EP that fit under these codes to share with us?

☼ PPT 72

CC/DR/HR
Possible Responses:
- *Similarities: Participants engaged in these activities are working toward overcoming a barrier to employment.*
- *Differences: Child Care Related Activities focus on participants obtaining childcare. Participants engaging in Drivers Education activities are enrolled in a course that includes classroom and behind the wheel instruction, with the intent to obtain their driver's license. Housing-Related Activities are for participants who are facing housing issues and need to stabilize their living situation.*

☼ PPT 73

Now, let's match those codes with activity descriptions.

Click to display the activity descriptions, then after learners are done annotating, **click** again to display correct answers.

Use YoungStar to research childcare facilities near your home.
Answer: CC

Complete online driver's education class through justdrivewi.com.
Answer: DR

Apply for housing assistance to help get a place of your own.
Answer: HR

Ask Who has an example of other activities you've seen on an EP that fit under these codes to share with us?

☼ PPT 74

Thanks to all groups for sharing. **Ask** What stood out to you identifying activity codes?

As a Case Manager, it is critical that you are aware of all resources and providers available to provide appropriate options and assignments to participants. Engaging participants with appropriate options and assignments helps them to reach their employment goals in W-2.

Polling Question 6: Activities

Directions to Trainer: Pull up Polling Question 6: Activities. Close out the question after everyone has answered, or after 1 minute has passed. Then, share the results.

For your reference, this is the question:
How many new activities did you think of and/or see that you would like to take back to the office with you?

- *1-2*
- *3-4*
- *5+*

Trainer Instructions to Learners: We just explored a lot of activities and activity codes! Now we want to hear from you. How many new activities did you think of and/or see that you would like to take back to the office with you? Select a number of activities and submit.

Put a few of the activities you plan on taking back to the office in the chat.

Supportive Services

☼ PPT 75

PG 36

Remember, after assigning activities, we provide Supportive Services to assist participants in completing those activities. These Supportive Services could range from education or training assistance and funding, to transportation funding, to work related equipment and clothing. These supports eliminate some barriers to participation and play a crucial role in helping participants achieve their goals.

Say What do Supportive Services look like in your community? Record your answers in the space in your Participant Guide.

Ask As you were identifying your community supportive services were you able to identify these common Support Services needed by W-2 participants?

Ask Which ones did you feel comfortable that you have a handle on what is available in your community? Which ones did you not have a handle on?

Ask How can you become more comfortable with supportive Services in your community?
Possible responses: Discuss supportive services with ATL, Supervisor, colleagues

Day 3 Wrap-Up

☼ PPT 76

Remember, there should be solid, visible connections between what assessment information tells us about a participant and their EP. Take a minute or so to think about everything we discussed in class so far, from assessment to Employability Plans.

In a moment, we will display a word on the screen. Using your Text annotation tool, put words or phrases on the screen that are associated with and start with the last letter of that word. Our goal is to get as many words as possible on the screen.

For example, if the word on the screen is PTT, you could put the words training, team, and trainers on the screen. What can I clarify for you before we get started?

Employability Plans
Supportive services, support, school, search, Secondary Employment Goal, steps, secure employment

Goal Setting
Goals, Goal Steps, Goal Description, Geared toward individuals, GED

WWP
Participant centered, plans for employment, Primary Employment Goal, participants, Participation Statuses

That is all we have for you today. Have a great rest of your day!

Self-Facilitated Introduction: Day 4

☼ PPT 77

Estimated Length: 15 minutes prior to class

Directions to Trainer: Display the slide 15 minutes before class starts. Instruct learners to use their Text annotation tool to answer the question displayed on the screen.

Trainer Instructions to Learners: Use your Text annotation tool to answer the questions on the screen. Feel free to unmute or type in the chat to talk to others about the question.

Day 4 Welcome

☼ PPT 78

Welcome to our final session for W-2 Case Management: Assessment and Employability Plans. Yesterday we talked about Employability Plans.

Colleague Q&A

PG 37

Purpose: Review EP information covered during class and answer any remaining questions.

Materials: None

Estimated Length: 15 minutes

Directions to Trainer: Instruct learners to think about what was covered yesterday and come up with 3 questions or observations they have regarding EPs. Give them 3 minutes. Then, put learners in groups of 2-3 and send them out into breakout rooms. In their rooms, each learner takes turns asking their questions, and the other members of their group will answer. Give them 5 minutes.

Trainer Instructions to Learners: Take a few moments to think about everything we discussed yesterday. Then, jot down 3 questions or observations you have regarding EPs in your Participant Guide. Put your favorite candle scent in the chat after you have come up with your questions.

Next, we will put you into breakout rooms with one or two colleagues. In your breakout rooms, take turns asking each other your questions, or telling each other your observations. If no one in your group is sure of the answer to a question, set that question aside. You will have the opportunity to ask us any questions your group could not answer when you return to the main session. You have 10 minutes.

Note to Producer: Send learners into breakout rooms of 2-3. Schedule the breakout rooms to end in 10 minutes.

Ask What questions could your group not answer?
Questions will vary. If there are no questions, have each group report out one question and answer or observation from their discussion.

Practicing EPs

☼ PPT 79

PG 55-56 (Appendix D)

Purpose: To tie together the entire discussion of assessment, goals, and available activities into a plan for the participant.

Materials: None

Estimated Length: 40 minutes

Directions to Trainer: Break out learners into their groups to return to their assigned scenario. Instruct each group to complete the rest of the Employability Plan Worksheet, including developing activities and identifying the activity code for each activity. There also is a calendar they may use to assist with scheduling activities.

Trainer Instructions to Learners: Again, you will return to the scenario you were working on. Using the information we discussed yesterday, create activities for Arya. Record them on your Employability Plan Worksheet. There is a blank calendar for you to use as needed. You may want to display a whiteboard in your breakout room in order to develop the activities together. After deciding on appropriate activities, remember to add supportive services. You have 20 minutes. The shortest person in your group will be your spokesperson.

Note to Trainer: Rotate through the breakout rooms to review the activities groups are coming up with.

Debrief Questions: Debrief as a large group by asking a spokesperson for each group to report out. Give feedback to each group.

Discussion
- What did you notice about the activities that you assigned?
- What challenges came up when you were assigning activities?
- How do the activities you assigned connect to the goals you developed?
- How did the assessment information influence the activities you assigned?
- In what ways will you use this information to help participants reach their goals?

Emoji Energizer

Time: 5 minutes

Directions to Trainer: Read each statement below. Have learners select an emoji and put it in the chat reacting to each statement.

Trainer Instructions to Learners: Case management in the W-2 program can be a whirlwind of emotions, for both you and participants. One guarantee is that no two days will be the same. I am going to read several statements. Your task is to select an emoji to react to that statement and put it in the chat.

A participant gets a job.

All the participants you work with turn in their logs on time.

You just finished New Worker Training.

An employer wants to partner with your agency to hire participants with whom you work.

You just finished all your EP review appointments for the week.

Thank you all for sharing those emojis with us! No matter what emotions you may have throughout the day, it is important to remember why we are here – to help participants! And one thing everyone knows to be true is that EPs are developed to do just that.

EP Summary

☼ PPT 80

Directions to Trainer:
Part 1: Have learners to come up with five statements they know to be true about EPs, and record them in their Participant Guide.

Part 2: Put learners in breakout rooms and have them share their statements. Have them pick their top two to report out to the large group. Give them 7 minutes. As learners report out, record their statements on the PowerPoint.

Trainer Instructions to Learners:
Part 1: In your participant guide, list five more statements you know to be true about EPs. Put your favorite breakfast item in the chat when you are done.

Part 2: In a moment, we will put you into breakout rooms. In your rooms, share your five statements. After hearing all the statements, pick your top two to report out to the group. You have 7 minutes. The person who has the most pens on or near their desk/workstation will report out for your group.

Note to Trainer: Clear annotations before moving to the next slide.

We also came up with a list of what EPs are. As we go through our list, make notes regarding these statements in your Participant Guide.

☼ PPT 81

EPs ARE:

- Required (for most W-2 cases)
- For the participant
- Updatable at any time
- Steps toward goals
- Developed WITH the participant
- Different for each participant
- A reflection of assessment information and the participant's goals
- Reviewed frequently with the participant
- Coordinated with other relevant case plans the family is involved in
- Printed and given to the participant

Note to Trainer: This is the policy reference if learners have questions.
Reference: W-2 Policy Manual 6.1

The EP must be developed with all applicants assigned to Up-Front Job Search and with all participants who are assigned to any of the following:

- *A TEMP, TSP, CSJ, or W-2 T placement;*
- *A CMU, CMF, CMF+, CMD, CMJ, or CMN placement;*
- *A CMC, CMP, ARP, or CMM placement only in circumstances where the participant has volunteered to participate in activities as part of the W-2 program; and*
- *A second parent in a two-parent household who participates in W-2 activities.*

Keys with EPs

☼ PPT 82

PG 38

Trainer Instructions to Learners:
Part 1: Review the statements about Keys to EPs, and star the statements you feel are most important to you as a W-2 worker. Put your favorite restaurant in the chat when you are complete.

Part 2: Now read the statements again, and circle the statements you feel are most important to participants. Put your favorite book in the chat when you are complete.

Part 3: As I read the statements out loud, give a thumbs up reaction for the statements you feel were most important to you. Give a heart reaction for the statements you feel were most important to participants.

Remember the Purpose - It's the participant's goals and employability plan
Be specific. The EP is a path to the participant's immediate and future employment goals. Make the steps toward the goals and the activities designed to reach the goals clear and easy to follow.

Be a partner - Personalize activities WITH the participant
Design the activities to be unique to the participant's needs and expected outcomes. Be sure activities on the EP are consistent with both informal and formal assessment results and goals.

Personalize Personal Goals!
Address the participant's personal goals. Do not list program goals in the personal goal section.

Be Outcome Based
State the measurable expectations or outcomes for activities, and evaluate them regularly.

Consider Other Case Plans
Many participants have plans with other programs or agencies. Whenever possible, include the goals and activities from these plans when developing the W-2 EP (for example, Child Welfare activities). Pay attention to scheduling, timeframes, and the ability of the participant to do all the activities assigned.

Keep it Current/Keep it Fresh
The EP is not a long-term continuation of the same activities where you update only dates and nothing else. If the same activities are not producing results, change them.

Print the EP, and Give it to the Participant Whenever it Is Updated
The EP is for the participant. Give the participant the latest copy. The participant always should have the most up-to-date plan for achieving their goals.

As part of ongoing case management, when reviewing the EP, consider the following:

- Is the participant making progress?
- Have any goals been met?
- Are new goals appropriate?
- Is there new assessment information that would impact the plan?

You can update an EP with the participant at any time, not just during a review. Sometimes updating an EP means "starting over" if previous activities are not working.

System Documentation

All the information we have covered so far needs to be documented in WWP.

Documentation is important because:

- It is required by policy
- It's good case management
- It keeps track of progress
- It helps you and the participant recall what was discovered and discussed at previous meetings or appointments
- BWF expects to see an Employability Plan with:
  - Individualized goals that are based on an individual assessment
  - Activities designed to achieve both goals and the career plan
  - Activities that are specific and have measurable outcomes
  - Services and accommodations that are recommended in the formal assessment to help a participant succeed in a work setting
  - A plan that is comprehensive in nature, including both personal and family goals

System Walkthrough: Assessment Documentation

PG 39

We will take a closer look at how everything gets documented in WWP. Pay attention to the information that we are entering for the Leilani scenario walk-through, for examples of how and what to document. Up first is assessment information. As we mentioned on day 1, assessment information is documented on various pages in WWP. We'll be working with a participant named Leilani. Leilani is a current W-2 participant. She enrolled in W-2 about two weeks ago, and is placed as a CSJ. She has a two-year-old son named Kai.

We will continue to learn more about Leilani as we walk through these entries.

Note to Trainer: Log into WWP Training Environment and pull up Leilani's PIN if you haven't already. Basic information is provided, but there may be instances when you need to use your judgement to make up any relevant information that may be missing, or adjust entries based on the learners' needs. For lengthy entries, copy text from the TN and paste in the WWP field.

Note to Trainer: Navigate to the **Informal Assessment Summary** page.

Ask Before we get started with Leilani's entries, when must you complete and submit an Informal Assessment for a participant? Unmute or type in the chat.

Keep in mind, you must complete and submit the Informal Assessment Driver flow prior to initial placement and at each placement change.

Remember to add additional information to Notes and Details fields to help tell the story of each participant.

Note to Trainer: Navigate to the **Work History** page.

After participants complete their career assessments, remember to come back to the **Work History** page and update the career assessment question. You can refer to the **Career Assessment** page or list the specific career path results in the Details field.

Note to Trainer: Navigate to the **Education History** and **Post-Secondary Education** pages.

Likewise, when participants complete their GED, HSED, or certifications, update the appropriate questions on the **Education History** and **Post-Secondary Education** pages.

Note to Trainer: Navigate to Leilani's **Participant Barrier** page.

There are several places you need to document completed formal assessments. First, navigate to the participant's **Participant Barrier** page and enter the **Assessment Date**. Record **How long will the symptoms likely last?**, the **Recommended Reassessment Date**, and any other relevant information. Then, add the specific accommodations you are providing in the **Details** field of the **Accommodations**.

Note to Trainer: Go to the Participation Statuses app and open Leilani's FA status.

Next, navigate to the Participation Statuses app and update the **Details** field to reflect the completion of the formal assessment. Remember, WWP will automatically end the FA status. Do not enter an **End Date**.

Polling Question 7: All About the Informal Assessment

Directions to Trainer: Pull up Polling Question 7: All About the Informal Assessment. Close out the question after everyone has answered, or after 1 minute has passed. Then, share the results.

For your reference, this is the question:
Which page of the Informal Assessment 'Rocks your socks'?
- *Work History*
- *Educational History*
- *Post-secondary Education*
- *Participant Barriers*

Trainer Instructions to Learners: We've spent quite a bit of time talking about the informal assessment. Based on the Informal Assessment pages we just looked at, which page 'rocks your socks'?

System Walkthrough: Employability Plan Documentation

The EP documents current expectations and steps to reach goals through engagement in activities. You should document the outcome of activities by summarizing this in PIN comments.

Let's take some time to walk through the EP driver flow by creating a subsequent EP for Leilani. There's no need for you to do this in the system, simply follow along with us.

- **Navigate** to the **Employability Plans** page by clicking the Employability Plan icon from the **Case Management** navigation toolbar.

- **Click** + New Employability Plan.

- **Program** defaults to W-2.
- **Enter** an **EP Begin Date** of today and an **EP End Date** of one month from today.

- "Create EP without Activities?" **select** NO

Information in the **Notes** field carries over from the current EP. You can edit or add information as needed.

Ask what type of information could you add to the **Notes** field? Unmute or type in the chat.
Possible Responses: logs are due Friday by 4 PM

- We have no new information to enter in the **Notes** field.

- **Click** Save + Continue to save and navigate to the next page in the driver flow.

Goals

We have arrived on the **Goals** page. Goals on the current EP carry over and display for subsequent EPs. Keep in mind, the only updates you can make to carry-over goals are to complete a goal step or end the goal. If you want to make updates to a goal, you must end the current goal and re-enter it as part of a new EP.

Review the goals listed on the **Goals** page. Remember to evaluate participants' progress with their Goal Steps.

System Walkthrough: Goals

Leilani's Primary Employment Goal is to obtain full-time work, which doesn't meet the goal definition.

Ask What things may be needed to make this goal better? Unmute or type in the chat.
Possible Responses: Use SMART goal criteria, specific job title, specific time frame

- **Click** on Leilani's **Primary Employment Goal**
- **Click** End Goal
- **Click** REPLACED WITH NEW GOAL as the **End Reason**
- **Click** Save to end Leilani's goal and navigate back to Leilani's **Goals** page

Based on her career assessment and prior work history, Leilani would like to look for jobs as an activities assistant.

- **Click** + Add Goal
- **Goal Type** drop-down: **Select** PRIMARY EMPLOYMENT GOAL
- **Goal Begin Date**: auto-populates with EP Begin Date.
- **Goal Name:** ACTIVITIES ASSISTANT

Remember, the EP is for the participant. The information you enter in the **Goal Description** field should include all relevant information so that participants remember why that is their goal. It should also include SMART goal criteria.

  - **Goal Description**: LEILANI ENJOYS DOING ACTIVITIES WITH HER CURRENT CLIENT. SHE WOULD LIKE TO EXPLORE FULL-TIME OPPORTUNITIES IN THIS FIELD, PERHAPS WORKING IN AN ASSISTED LIVING OR NURSING HOME FACILITY.

The **Goal Steps** should break the goals down into smaller, more manageable steps. Check off the steps as the participant completes them, and celebrate the success with participants.

Ask keeping in mind the goal description, and that this is a Primary Employment Goal, what may be some possible goals steps Leilani could take to work toward achieving this goal? Unmute or type in the chat.

- **Click** + Add Goal Step
    - PARTAKE IN INFORMATIONAL INTERVIEW WITH AN ACTIVITIES ASSISTANT BY THE END OF NEXT MONTH.
- **Click** + Add Goal Step
    - VOLUNTEER AT A FACILITY AT LEAST TWO TIMES PER WEEK TO GAIN HANDS ON EXPERIENCE.
- **Click** Save

Leilani likes her current job. She tells you if she can increase her hours, she wouldn't mind staying.

- **Click** + Add Goal
- **Goal Type** drop-down: **Select** SECONDARY EMPLOYMENT GOAL
- **Goal Begin Date**: auto-populates with EP Begin Date
- **Goal Name**: IN-HOME CAREGIVER
    - **Goal Description**: LEILANI LIKES HER CURRENT JOB BUT WOULD LIKE TO WORK 10-15 HOURS PER WEEK. SHE HOPES TO INCREASE HER HOURS OVER THE NEXT THREE MONTHS.

Ask what suggestions or ideas do you have for possible goal steps for this goal? Unmute or type in the chat.

- **Click** + Add Goal Step
    - ASK SUPERVISOR IF MORE HOURS ARE AVAILABLE WITH CURRENT CLIENT BY THE END OF THE WEEK.
- **Click** + Add Goal Step
    - SCHEDULE MEETING WITH SUPERVISOR BY THE END OF NEXT WEEK TO DISCUSS IF THERE ARE OTHER CLIENTS RESIDING IN THE AREA.
- **Click** Save

During her initial interview, Leilani told us she wants to become a Registered Nurse (RN). You discussed this possibility with Leilani a bit more, and she decided this would be her Long-Term Career goal. Since then, she completed the Workplace Essentials workshop, which is one of her goal steps.

- **Click** on Leilani's **Long-Term Career Goal**
- **Check** the Completed? box for the Workplace Essentials Workshop **Goal Step**.
- **Click** Save

One of the goal steps Leilani identified in achieving her Long Term Career Goal is obtaining her LPN Certification. This is a good Other Program Goal, as it centers on the education and training she needs to achieve her employment goals. Let's add this as her Other Program Goal.

- **Click** + Add Goal
- **Goal Type** drop-down: **Select** OTHER PROGRAM GOAL
- **Goal Begin Date**: auto-populates with EP Begin Date.
- **Goal Name**: LPN CERTIFICATION

  Goal Description: LEILANI LIKED WORKING AS A CNA AND THINKS LPN IS THE LOGICAL NEXT STEP ON THE WAY TO HER LONG-TERM GOAL. SHE THINKS NOW WOULD BE A GOOD TIME TO FURTHER HER EDUCATION SINCE SHE IS NOT WORKING AS MUCH AND CAN FIT IN HOMEWORK AROUND KAI'S SCHEDULE.

- **Click** + Add Goal Step
  - SIGN UP FOR CLASSES BY THE END OF NEXT MONTH.
- **Click** Save

During your conversation, Leilani mentions that it is important to her to spend more quality time with her son, Kai. He is a little behind in his development, so she wants to work with him on this. Let's enter this as a personal goal for Leilani.

- **Click** + Add Goal
- **Goal Type** drop-down: **Select** PERSONAL GOAL
- **Goal Begin Date**: Auto-populates to EP Begin Date
- **Goal Name**: SPEND TIME WITH KAI
  - **Goal Description**: FOCUS ON SENSORY AND MOTOR DEVELOPMENT ACTIVITIES FOR 30 MINUTES EVERY DAY.

- **Click** Save

Review Leilani's goal page. Remember, you are able to edit goals prior to submitting the EP. Any changes you need to make to goals after submitting the EP requires another new, subsequent EP.

- **Click** + Continue to save and navigate to the next page.

System Walkthrough: Employments

The next page in the driver flow is **Employments**. Any employment without an end date listed on the **Work History** page or app displays here.

Always <u>check</u> <u>the</u> <u>box</u> to include participant's employment if they are working. The employment will not be included on the EP if you do not check the box.

*Leilani is working 5 hours a week at Visiting Angels. The employment information from the **Work History** app displays here for us.*

- **Check** the box to indicate that we want to include this employment on Leilani's Employability Plan.

- **Click** + Continue to save and navigate to the next page.

System Walkthrough: Elapsed Activities

Because we're in the driver flow for an In Progress EP, activities with a planned end date that is prior to the In Progress EP begin date display on the **Elapsed Activities** page. You cannot edit or carry over elapsed activities in the subsequent EP.

You must end the activity on the **Elapsed Activities** page by selecting a **Completion Reason** from the drop-down. WWP uses the **Planned End Date** as the date the activity ended. If the participant will continue to engage in this activity, you must re-enter the activity with new begin and end dates on the **Activities** page.

Remember, it is not best practice to <u>backdate</u> an EP. However, in the rare occasion you were unable to meet with a participant prior to an activity's **Planned End Date**, you can backdate the EP up to <u>10</u> calendar days.

If the **Planned End Date** falls within the last 10 calendar days, you can backdate the EP to that date. This means you can update the **Planned End Date** without having to enter an **Actual End Date**. Then update the activity, ensuring the participant gets credit for partaking in the activity.

If the **Planned End Date** is further back, you can backdate the subsequent EP the full 10 calendar days, enter an **Actual End Date** for the elapsed activity, and re-enter the activity with the appropriate dates. This ensures that the participant gets as much credit as possible for partaking in the activity.

*Leilani was assigned a Workplace Essentials Workshop on her initial EP. As you can see, the workshop is now an elapsed activity because the **Planned End Date** has passed. She successfully completed the workshop as assigned.*

- **Completion Reason** drop-down: A – SUCCESSFULLY COMPLETED
- **Click** Save + Continue to navigate to the **Activities** page.

Activities

The **Activities** page includes the specific program activities the participant will undertake to achieve their goals.

Remember, each activity must include:
- The activity to be completed.
- An activity description to ensure the participant fully understands what the activity involves.
- The provider of service and activity location.
- The activity schedule(s). This includes a planned begin and end date, the specific days of the week, and the specific number of hours on each day that activity is assigned.
- Any additional remarks to assist the participant.

All this information prints on the EP creating a daily schedule for the participant so they know exactly what they must do and when they must do it. If you have listed accommodations in WWP, then you should complete a services and accommodations form with the participant and scan it into ECF.

Remember, there should be solid, visible connections between what assessment information tells us about a participant and the goals and activities assigned on their EP.

System Walkthrough: Leilani's Activities

Prior to Leilani's appointment today, you reviewed her activity logs and noticed she has not been completing all of her assigned job search hours. You discuss this with Leilani, and she states she gets busy and forgets to look for jobs. She says when she does remember, she gets stuck on how to answer some of the questions and gives up.

Ask How could we assist Leilani with her job search?
Facilitated job search at your office
- **Click** her employment search activity to open the **Edit Activity** page.

- **Check** End Activity? checkbox
- This opens an **Activity Completion** section. **Completion Reason** drop-down: B – INCOMPLETE/INTERRUPTED
- **Actual End Date**: YESTERDAY'S DATE
- **Click** Save
- **Click** + Add Activity to open the **Add Activity** page
- **Activity** drop-down: ES – EMPLOYMENT SEARCH FOR W-2/CF
- **Activity Description**: GROUP JOB SEARCH AT THE W-2 OFFICE. JOB DEVELOPER IS AVAILABLE TO ANSWER QUESTIONS AND PROVIDE ASSISTANCE.
- **Activity Location**: **Click** On-Site
- **Business Name:** ROSS INNOVATIVE EMPLOYMENT SOLUTIONS
- **Location:** Start typing MIL; **Select** MILWAUKEE, WI, USA
- **Street Address:** Start typing 7800; **Select** 7800 W. BROWN DEER ROAD
- **Zip:** Auto-populates 53223
- **Phone:** 414-760-6060
- **Additional Information**: BRING A COPY OF YOUR WORK HISTORY AND REFERENCES WITH YOU.

Activity Scheduler:

- **Start Date**: Use a future Monday, Wednesday, Thursday, or Friday date that is closest to today.
- **Click** the recurring checkbox
- **Frequency**: WEEKLY
- **Days (Select all that apply.)**: MONDAY, WEDNESDAY, THURSDAY, FRIDAY
- **Planned End Date**: ONE MONTH FROM TODAY
- **Hours Per Day**: 1.5
- **Begin Time**: 08:00 AM
- **End Time**: 09:30 AM
- **Click** Save

Now that we have updated Leilani's job search activity, we can edit a current activity. This morning, you received an email from the Job Developer stating that Job Club is moving from Thursday afternoons to Tuesday mornings next week.

Ask How would you handle this?
Check with Leilani that the new day and time still work for her, and update her schedule on her EP.

- **Click** her Job Club activity to open the **Edit Activity** page.
- **Scroll** down to the **Activity Scheduler** section.
- Notice that the **Start Date** of the activity auto-updated to the **EP Begin Date**. This field remains editable until you submit the EP.

Because Job Club moves to Tuesdays next week, we must tell WWP to maintain the current Job Club schedule for this week and start a new one next week.

- **Planned End Date**: THIS THURSDAY
- **Click** + Add Activity Schedule
- **Start Date:** NEXT TUESDAY
- **Click** the recurring checkbox
- **Frequency**: WEEKLY
- **Days (Select all that apply.)**: TUESDAY
- **Planned End Date**: ONE MONTH FROM TODAY
- **Hours Per Day**: 1.5
- **Begin Time**: 8:00 AM
- **End Time**: 9:30 AM
- **Click** Save

We updated the schedule for Leilani's Job Club activity to indicate a future change. Any time you want to change the days or hours of an activity in the future, update the planned end date for the current schedule and add a new schedule for the change. One example of when to do this is when you are layering an EP.

If the change occurs on the same day as the EP Begin Date, you can simply edit the current schedule without adding a new one. Regardless, you do not need to close the activity and reopen it.

Wow, that was a lot of information that we just covered in that walk through.

- What did you observe during this walk-through that caught your attention?
- How did you feel going into this activity versus when we finished the walk though?
- What do you understand better about WWP?
- How might you apply what you observed when you get back to your office?

Common Thread Energizer

Estimated Length: 6 minutes

Trainer Instructions to Learners: To give you a little break from Assessments and EPs, we will send you to breakout rooms. Find one unique thing everyone in your group has in common: the more creative, the better. Be sure to designate a spokesperson to report out. You have five minutes.

Note to Trainer: Put learners back into their same breakout rooms. Schedule the breakout rooms to end after 4 minutes. After everyone comes back from the breakout rooms, have them report out.

PIN Comments

PPT 83

PG 40

After we complete assessments and develop Employability Plans, we still have one more step we need to take.

Ask What is that step?
Document in PIN comments

PIN comments are our way of documenting everything that is going on with participants. It reminds us what participants have disclosed, what their goals are, and the steps we plan to take to help participants reach their goals. It also reminds us of our rationale for our placement decisions and activity assignment.

That is a lot of information to capture! Effectively using comment types when entering comments helps you sift through it all and find the information you are looking for in a timely fashion. In your Participant Guide, there is a list of comment types available to you based on your role as a W-2 worker. Take a moment to read through your list.

Comment Type Activity

PPT 84 Marques, 85 Charity, 86 Jemma,

PG 41

Purpose: Learners practice selecting comment types while seeing examples of PIN comments.

Materials: None

Time: 10 minutes

Directions to Trainers: Read the PIN comments below. Give learners 30 seconds to one minute to determine the correct comment type(s) and place their answer in the chat. Go through the correct answers after each PIN comment. Repeat until you have gone through all example PIN comments and their corresponding comment types.

Trainer Instructions to Learner: Today we are assisting a new W-2 worker. She is doing well with what to include in PIN Comments but is struggling with choosing the comment type. I will read her comment that she submitted to us. The comments also are in your Participant Guide. Determine which comment type you would recommend she use. Record the comment type in the chat. Remember, more than one comment type can be selected for each PIN comment.

Marques has a recent work history, HS diploma, and reliable transportation. He does not have childcare set up, and has been able to maintain employment for only two months at a time. Placing him as a CSJ today to work on his soft skills to improve job retention, secure childcare, and develop backup plans for childcare and transportation.

Comment Type: *Placement Decision, Informal Assessment, Non-Health Barriers*

Met with Charity today for an ongoing appt. She states that she likes volunteering at Little Sprouts Daycare. Says they have been letting her run more activities with the kids and she enjoys coming up with ways for them to learn while having fun. Charity expressed interest in getting a technical diploma in early childhood education, but is worried about how she would pay for it. Informed Charity about WIOA program, and asked if that is something she would be interested in. She states it is. Called WIOA Case Manager with Charity in the office and they have an appt scheduled for Tuesday. Charity signed ROI, see ECF. Updated EP to include 5 hours of volunteering at Little Sprouts and 1 hour of independent job search every weekday. Goal of volunteering is to gain experience in the childcare field and a current reference. Job search will focus on open positions in the childcare field. Will add meetings with WIOA Case Manager and class/study time to EP after she gets enrolled. Updated other program goal to obtain Early Education Teacher certification from Fox Valley Technical College (FVTC).

Comment Type: *Working with Partner Agencies, Employability Plan/Activity Assignment, Appointment – EP Review*

Received call from Jema today at 8:36am. She states she is sick and is unable to attend Job Club or Work Experience. Requested that she call her worksite supervisor as well to let her know. States she did. Provided 1 hour of GC for Job Club and 4 hours of GC for Work Experience due to illness.

Comment Type: *Phone Contact, Good Cause Determination*

Debrief:
How do you benefit from identifying the comment type when entering PIN level comments? *Possible response: to be able to efficiently locate documentation*

Who do you help when you correctly identify the comment type?
Possible responses: case manager, quality assurance staff, job developers, co-workers, state reviewer

Under what circumstances or what situations is it helpful to be able to search for a specific comment type?
Possible responses: good cause determination, loss of contact

Being able to locate and review documentation information when needed allows you to respond timely, efficiently and accurately to requests from the participants.

Polling Question 8: Comments

Directions to Trainer: Pull up Polling Question 8: Comments. Close out the question after everyone has answered, or after 1 minute has passed. Then, share the results.

For your reference, this is the question:
What key piece of information must be included in PIN Comments?
- *Your rational*
- *Summary of current situation*
- *Participant progress*
- *All the above*

Trainer Instructions to Learners: Documentation is a crucial part of case management. What key piece of information must be included in PIN Comments?

Changes to Arya's Situation Activity

PPT 87

PG 42, 57 (Appendix E)

Purpose: Learners practice problem solving when changes occur to a participant’s situation.

Materials: None

Estimated Length: 20 minutes

Direction to Trainer: Changes have happened in Arya’s circumstances after a period of time. There are two different changes for her.

Randomly assign one change to each group (two groups will get the same change). Groups identify and record the necessary updates based on the new changes (goals, activities, supportive services, referrals, informal assessment updates, etc.). Groups record their actions in their Participant Guide. After time is up, have each group report out the changes that were made. Provide feedback as needed. Possible responses for each change are listed below along with the changes.

Trainer Instructions to Learners: Remember, documentation isn’t the last step in the Case Management Process Model. Participants’ situations change all the time, and the cycle continues. We get new information and need to act on it. In some cases, that means reevaluating an EP, completing additional assessments, or providing new resources. In a moment, we will send you back into your breakout rooms to work with Arya one last time. We will give you a change that occurred for her, and your group needs to identify the necessary updates in your Participant Guide. The person whose birthday is closest to today’s date will report out for your group. You will have 15 minutes for this activity.

Note to Producer: Schedule breakout rooms to end after 14 minutes with a 60 second countdown.

Arya – Non-Participation:
Arya has not turned in logs for the last two weeks and did not attend her ongoing appointment today. You reach her by phone. Arya tells you she is not feeling like herself. She says she is really bummed out, feeling detached from what goes on around her. Arya reports she hasn’t left home in over a week, and her mom has been helping out with Robbie. She knows she should have called you, but she was worried you would be disappointed that she has not completed her activities recently.

What would you do?

Possible Response: Provide reassurance that you are not disappointed with Arya. Refer for formal assessment. Update activities. Schedule a follow up appointment. Provide additional local resources & referrals (crisis line). Provide good cause as necessary.

Arya - Housing Crisis:
Arya has come to see you without a scheduled appointment. She says her mother told her she has to move out by the end of the week due to the six-week deadline. Arya said she applied for housing assistance and is next on the waiting list, but was told it may take 1-2 months for approval. Arya is not sure what to do in the meantime, and does not have anywhere else to go. She didn't attend her activities today due to coming to see you.

What would you do?

Possible Response: Refer for emergency assistance. Provide any local community resources & referrals. Provide good cause as necessary. Update EP if needed.
We have covered a lot of ground in these four days to help you get a better picture of assessments and employability plans and how they are intertwined to support a participant in reaching their goals.

Day 4 Wrap-Up

☼ PPT 88

PG 43

Assessment begins when the individual first contacts the agency to apply for W-2, and continues throughout their participation. Assessment information is worthless if it is not used when setting goals and developing employability plans with the participant. Timely and accurate documentation of case management actions in WWP is critical to evaluating the success of W-2 case management. Re-evaluate goals and activities when there is new information and changes in circumstances, making updates and changes as appropriate.

Closing Activity

The graphic on this page brings us full circle from where we started our discussions yesterday. This graphic represents pulling together case management functions that we spent the last two days discussing, reviewing and experiencing.

☼ PPT 89

Everyone take a few minutes to think about everything we have covered the last four days. We will go around our virtual room and share our biggest takeaway. You can unmute to share your takeaway, or you can put it in the chat.

Note to Trainer: Type each learner's takeaway next to their name on the screen.

We are putting a link to the course evaluation in the chat. We value your feedback. Thank you for your time and participation.

Appendix A: Trainer Prework

2-3 days prior to class, one case must be created in the Training Environment to use to demonstrate system walkthrough.

Leilani's Information

Enter/complete the following in CWW and WWP for Leilani.

CWW

You do not need to run eligibility. Go only as far as referring her to Work Programs.

Create RFA:
- Leiani (Last Name), female
- DOB: Make up a month and day in 1993
- Walk-In, English
- Race/Ethnicity: Did not disclose; Not Hispanic/Latino
- Lives in Milwaukee (make up address), no alternate

Process Request:
- WI No housing subsidy
- Refer to Work Programs

WWP

Enroll in WWP

Participation Statuses
- Add an FA status

Enter Employment via Work History app
- Add Work Record
  - Unsubsidized
  - 3/18/17 - Current
- Basic Information
  - Home Health Companion, Visiting Angels, Milwaukee
  - Medication monitoring, grocery shopping, light housekeeping, cooking/meal-prep, transporting to and from appointments
  - No benefits, independent job search
- Current or Most Recent Wage/Hours
  - Hourly (10.50/hr)
  - 5 hrs/wk

Create an EP
- EP Overview
  - Current Date – 1 month from current date
  - Do not create w/o activities

    - Notes: Turn in activity logs and employment search verification from the previous week to the W-2 Agency on Tuesdays by 4pm
- Goals
    - Primary Employment Goal
        - Goal Name: Get a job
        - Goal Description: Find full-time job
        - Goal Steps:
            - Apply for jobs
    - Long-Term Career Goal
        - Goal Name: Become an RN
        - Goal Description: Leilani has always dreamt of being an RN. She's passionate about helping people and thinks it will be a rewarding career.
        - Goal Steps:
            - Complete a soft-skills workshop.
            - Research schools/LPN/RN programs in the area and financial aid options. Identify 3 schools by the end of next month.
            - Enroll in RN program after obtaining LPN certification.

- Activities
    - MO - Job Readiness/Motivation
        - Activity Description: Workplace Essentials Workshop
        - Activity Location: On-site, Ross Innovative Employment Solutions
        - Activity Scheduler: Current Date (recurring) – 1 wk from current date, Weekly (MWF), 3.0 hrs/day

    - ES – Employment Search for W-2/CF
        - Activity Description: Look for jobs.
        - Activity Location: Self-Directed
        - Activity Scheduler: Current Date (recurring) – 1 month from current date, Daily – Every Weekday, 1.0 hrs/day

    - MO – Job Readiness/Motivation
        - Activity Description: Job Club
        - Activity Location: On-site, Ross Innovative Employment Solutions
        - Activity Scheduler: Current Date (recurring) – 1 month from current date, Weekly - Thursday, 1.5 hrs/day

- Submit EP

Appendix B: Assessment Process Model - PSA

Collection (of information)

You collect information through many sources. Below is a summary of four sources of information and a brief explanation of what they provide.

Forms

Provide us with facts and answers to specific questions that may warrant further exploration.

Example: A participant reports on an intake form that they do not have a driver's license. Why is that? Did they ever have one? Was it taken away?

Testing/Assessment

Provides us data in the form of scores, ranges, percentages, and/or lists.

Examples: Educational needs assessment, interest inventories, career assessments, aptitude assessments

Collateral Contacts

Provide us views of the participant through another person's eyes. This information could come from a work experience supervisor, Job Club facilitator, or resource room staff; it could be anyone who interacts with the participant.

Examples: A work experience site supervisor observes that a participant has conflicts with co-workers or uses appropriate or inappropriate language in the workplace. A Job Club facilitator may note that the participant would be a good mentor for someone else.

Personal Interaction

Provides insight to draw conclusions on the participant's feelings, attitude, and behavior. This is an opportunity for you to discuss other assessment results with the participant and make first-hand observations and evaluations.

Your personal interaction through conversation with a participant also provides the following: insight into their world, what they want in life, their hopes and dreams for their children, and their experiences and what motivates or inspires them.

It's important to know what assessment tools you have available, what assessments your agency uses, what information those assessment tools provide, and how to interpret and use the results.

Evaluation (of information)

After information has been collected, it must be evaluated to determine its significance and value to the participant and the case management process. The process of evaluation includes determining what to do or how to use the collected information. We must evaluate all information collected**.**

Evaluation of any assessment results should involve both the FEP and the participant. The participant needs to fully understand what the assessment results mean in order to participate meaningfully in setting goals and understanding the purpose of engaging in specific activities.

This understanding empowers participants to "make choices," not "take chances." If they understand their own assessment information, they can have a more realistic view of the future and choose goals that meet the SMART goals criteria.

Asking yourself and the participant specific questions can help you both evaluate the results.

Here are some questions that you and the participant may need to address when evaluating assessment information, and reasons why it is important to ask each question.

What does this result mean?
Accurate interpretation of the result is critical. If you are not qualified to do it, or have questions about it, work with someone who can provide that expertise.

What else might have influenced the result?
Are there other factors in the mix? Did the participant have a bad day? Do they not do well on written assessments?

What does the result mean to the participant?
This is critical to the participant's buy-in of the process and the accuracy of the outcome.

How does the result impact our case management plan?
What do we need to change? What was reinforced? Is that documented?

Is any further assessment needed?
Sometimes, completion of one assessment leads to finding the need for another. It also may lead to further discussion with the participant, consultations with other professionals, or referrals for other services.

Action (based on information)

Action based on the evaluation of information collected can include*:*

- Updating the Employability Plan, including assigning new/different activities
- Changing Placement
- Making referrals
- Offering and providing accommodations

When you act based on the evaluation of assessment information, there must be a connection between this information and the participant's goals and assigned activities.

Many times, we see cases where multiple assessments are conducted, but there is no connection to the developed goals and assigned activities.

Implications for not acting or not using information collected and evaluated may include:

- Lack of participant engagement,
- Non-participation,
- Missed opportunities for referrals to employment, or
- Exhausting the TANF 60-month time limit.

There may be multiple types of actions based on assessment information. Some of these actions may include:

- Referral for formal assessment,
- Change in activities assigned,
- Referral to a Job Skills Training program,
- Providing accommodation(s) on a work site, and/or
- Inclusion of treatment plans in the Employability Plan

A common saying you may have heard is, "If a tree falls in the woods and no one is there to hear it, does it make a sound?" A similar statement could be made about assessment. "If a FEP conducts a wonderful assessment with a participant, but does not use the information it produces, did it really do any good?"

Documentation (of information)

Documentation is the evidence that serves as the record of the case management process.

All the information collected assists you in making case management decisions, such as what placement to assign a participant to, ongoing activities to assign, and if you need to offer additional assessments including a formal assessment.

Documentation, when done correctly, includes:

- what was collected
- how it was evaluated
- what the conclusions were
- what happened based on having this information
- what impact the information had

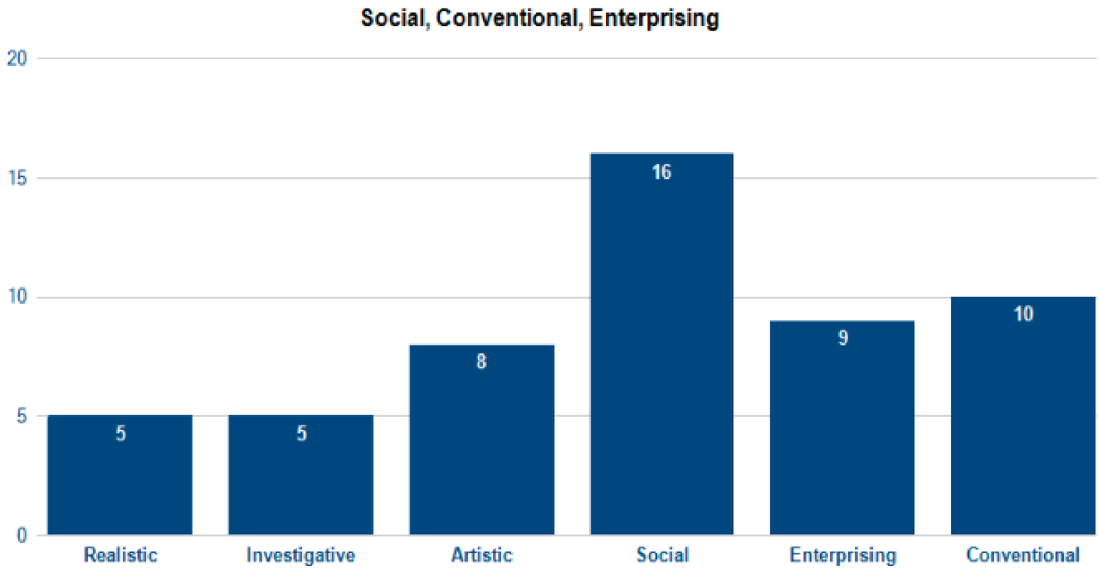
There are many places where we document information and track the impact of any information that is collected, evaluated, and acted on.

- WWP (including detail fields and notes sections, goals, activity engagement, and PIN level comments)
- CWW (case comments, eligibility related information, change in placement)
- ECF (Electronic Case File)

Appendix C: Career and Educational Needs Results

CareerOneStop Interest Assessment RIASEC Scores

Based on your assessment, you tested the strongest in:



More information about each interest area is listed below.

(R) Realistic
Realistic people tend to have athletic interests, prefer to work with objects, machines, tools, plants or animals, and like to be outdoors.

(I) Investigative
Investigative people like to observe, learn, investigate, analyze, and solve problems.

(A) Artistic
Artistic people like to work in unstructured situations using their imagination and creativity.

(S) Social
Social people like to work with people to inspire, inform, help, train or cure them.
At work and at home, you may:

- be patient, insightful, responsible, cooperative, outgoing, and skilled with words
- like to work in groups, volunteer, solve personal problems, or serve your community
- be able to teach others, mediate disputes, lead a discussion, communicate well, or plan and supervise activities

(E) Enterprising
Enterprising people like to work with people to influence, persuade and lead them, and to achieve organizational or financial goals.

(C) Conventional
Conventional people like to work with information, carry out detailed tasks, and have clerical or numerical interests.

Data on this tool come from various sources:

- The information and formula for **matching interests to careers** comes from O*NET's Interest Profiler.
- **Outlook data** come from O*NET's Bright Outlook occupations.
- **Wage data** come from the U.S. Department of Labor's Bureau of Labor Statistics, Occupational Employment Statistics Survey.
- **Education data** come from the U.S. Department of Labor's Bureau of Labor Statistics, Office of Occupational Statistics and Employment Projections.
- **RIASEC information** on occupations comes from O*NET's Interest Profiler.

We found careers matching your interest assessment.

Results Filtered by:
Match - Best

Match	Career	Outlook	Hourly Wages	Education
Best	Adapted Physical Education Specialists	Bright	No Data Available	Bachelor's degree
Best	Adult Basic & Secondary Education & Literacy Teachers & Instructors	Below Average	$25.05	Bachelor's degree
Best	Career/Technical Education Teachers, Middle School	Average	No Data Available	Bachelor's degree
Best	Child, Family, & School Social Workers	Bright	$21.34	Bachelor's degree
Best	Community Health Workers	Bright	$18.45	High school diploma or equivalent
Best	Eligibility Interviewers, Government Programs	Average	$21.35	High school diploma or equivalent
Best	Equal Opportunity Representatives & Officers	Average	$32.63	Bachelor's degree
Best	Health Educators	Bright	$25.93	Bachelor's degree
Best	Nannies	Bright	$10.72	High school diploma or equivalent
Best	Patient Representatives	Bright	$15.81	High school diploma or equivalent
Best	Recreational Therapists	Average	$22.92	Bachelor's degree
Best	Tour Guides & Escorts	Bright	No Data Available	High school diploma or equivalent

Educational Needs Assessment Summary

Individual Profile: Arya

Report Criteria		
ID: 00001 Test Name: TABE 9 Complete Battery Test Finish Date: 03-11-2019 Report Date: 03-11-2019	State: Wisconsin District: MATC School: Downtown Class: Monday ABE	Test Scheduler: Isabella Instructor

Test Results						
Content Area	Level	Number of Questions			Scale Score	Grade Equivalent
		Total	Correct	Attempted		
Applied Mathematics	A	50	32	50	569	9.8
Language	A	50	46	50	585	12.0
Math Computation	A	50	30	50	562	8.4
Reading	A	50	44	50	603	11.3
Total Battery**					579	10.3
Total Mathematics*					565	9.1

Note:
Level

- This is the level she tested into with her locator test.

Scale Score

- The scale score is what's used to compare performance with average test takers in the same level and content area. These can be compared across all subject areas and TABE levels.

The grade equivalent mirrors the typical structure seen in K-12 education, with the numbers representing a particular school year and month. These scores are not comparable across different test levels.