

Trainer's Notes

W-2 T Employment Focused Engagement Strategies

Purpose

To introduce engagement strategies that assist participants in a W-2 T placement reach their employment goals.

Learning Objectives

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

- Correlate participant assessment information with purposeful activities.
 - Describe what a reasonable accommodation is.
 - Explain to participants how to request accommodations in a variety of situations.
 - Identify additional programs that support participants in reaching their goals.
 - Collaborate with additional programs to support participant engagement in activities.
 - Apply engagement strategies that aid participants in achieving their goals and gaining employment.
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Materials Needed

Equipment

Laptop
Projector
Extension cord
Speakers

Trainer Materials/Resources

Trainer's Notes
Participant Guide (a copy for the trainer only to reference as needed)
PPT
Collaboration Videos 1 and 2 downloaded to laptop
Evaluations
Cardstock for Name Tents
QR Reader on Phone

Classroom/Learning Supplies

White Board markers
Flip Chart markers
Flip Chart paper
Tabletop materials – markers, colored pencils, post-its, pens, fuzzy sticks, etc.

Activity Supplies

Colored sheets of paper – Benefit Blast
Assembled Dice – Accommodations Activity
Printed Accommodations List from JAN – Accommodations Activity
Prepared Flip Charts – Activity Engagement Brainstorm
Multiple cards with activities listed on it – Activity Engagement Brainstorm
Printed Copies of Mental Health Report and MedCap form – Engagement in Practice
Printed Copies of Career Assessments – Engagement in Practice
Printed Copies of Vocational Assessments – Engagement in Practice
Printed Decisions – Engagement in Practice
Printed Options – Engagement in Practice
Envelopes – Engagement in Practice
Flip Chart Paper – Engagement in Practice
Painters tape
Mini Post-Its – High Five
Paper

Optional

Plastic Sheet Protectors for Engagement in Practice materials

Suggested Pace

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

9:00 – 9:30: Understanding Change Activity, Introductions, and Housekeeping

9:30 – 9:55: Assessment

9:55 – 10:30: Interpreting Assessment Scenarios Activity

10:30 – 10:45: Break

10:45 – 11:20: Accommodations

11:20 – 11:45: Accommodations Activity

11:45 – 12:45: Lunch

12:45 – 1:00: Collaboration

1:00 – 1:30: Collaboration Activity

1:30 – 2:10: Engagement Strategies

2:10 – 2:25: Break

2:25 – 3:25: Engagement in Practice Activity

3:25 – 3:40: Documentation


3:40 – 4:00: Wrap-Up Activity and Evaluations

Introduction

 PPT 1

 PG 4

Note to Trainer: As learners arrive, inform them that there will be an activity that requires a QR code reader. If learner is willing, recommend that they download a free QR code reader from their app store.

PPT Note to Trainer: The PPT displays the PG number for learners in the bottom corner of the screen (in the purple dot). Be sure to point this out to learners at some point during the introduction. If there is no number, that means there is no corresponding page in their PG. Whenever  is shown, click for additional information or graphics to display on the PPT.

Trainer introduction for learners: Change is a constant part of life. It can be difficult and scary at times to get out of our comfort zone and make the needed change. This topic of change will be a theme throughout today's training. As we discuss change and engagement strategies for participants in a W-2 T placement, keep in mind a time in your life when you have had to make a change.

Understanding Change Activity

 PPT 2

Purpose: Learners reflect on a time in their life when they have made a change. Responses on their thoughts, feelings, and reactions on change are reflected upon later in the day.

Materials: Questions in the PG.

Estimated Length: 15 minutes

Directions to Trainer: Have learners partner up. Each learner will have 5 minutes to share their change story. After the 5 minutes, instruct the learners to switch. The other learner has their turn to share for 5 minutes. After both partners have shared their change story, have the class come back to debrief in a large group.

Trainer Instructions to Learners: Think about a time in your life when you made a change. Find a partner and discuss a time in your life when you made a change. While your partner is talking, you can only listen and ask questions, but do not share your own experience. Share only what you are comfortable sharing. Remember to respect your partner's confidentiality. Use the questions in your Participant Guide to help your partner describe his or her change experience. After 5 minutes, I will call time and you will switch roles and repeat the process.

Ask the following questions:





1. Think about a participant who is struggling with change. Could their experience be similar to yours? How?
2. What have you learned that could help you in understanding and working with this person?

Welcome to W-2 T Employment Focused Engagement Strategies

PPT 3

PPT Note to Trainer: As you discuss what is covered throughout the day, click to get the main topics up on the screen.

This idea of change is just one theme of our class today. I want you to keep this experience from this first activity in mind as we continue through the day. Our goal today is to introduce engagement strategies that assist participants in a W-2 T placement reach their employment goals. To do that, we are going to talk about

 assessment,  accommodations, and  collaboration and how those ideas all play into  engagement strategies.

Note to Trainer: Introduce trainers and cover housekeeping topics if necessary.

Assessment

Making a Difference: Benefit Blast Activity

PPT 4

PG 5

Purpose: To quickly get buy-in on the importance of using assessment results to make a difference in case management. To promote teamwork and collaborative thinking. To energize the group.

Materials: Colored sheets of paper, one for each table group.

Estimated Length: 15 minutes

Directions to Trainer: Learners work in table groups. Each group generates a list of specific ways assessment results are used to make a positive difference in case management and for the participant. Groups have one minute to generate their list. After one minute, instruct groups to count the number of items they identified. The group with the longest list reads theirs out loud while other groups check-off similar items on their lists. Other groups add value to the longest list.

Trainer Instructions to the Learners: In your groups, come up with as many *specific* ways using assessment results benefit you and the participant. Be prepared to share your answers. You have one minute.

Go through the lists, adding any additional information that may be beneficial.

1. Was it easy or difficult to come up with your list?
Answers will vary. Answers may influence the remaining conversation. For example, if it was difficult to generate the list, additional time or attention may need to be spent on discussing benefits of assessment.
2. How are these benefits translated into goal setting with the participant?
Possible Answers:
 - *A participant's strengths, interests, and skills can be translated into employment goals.*
 - *Assessment results can identify what may need to be addressed first, second, third, etc. which can help develop other program and long term career goals and goal steps.*
 - *Assessment may uncover personal goals a participant may want to work toward.*
3. How do those goals and goal steps translate into activities?
Possible Answers:
 - *Activities should have a direct correlation to a participant's goals.*
 - *Participants should be able to clearly see how activities assigned help them make progress toward their goals.*
4. What are your take-aways from this activity?
Possible Answers:
 - *Assessment results are a crucial part of case management and making informed decisions, both for the FEP and the participant.*
 - *There are a myriad of ways that assessment results can be used and incorporated (goal development, activity development, resource connections, etc.).*
 - *It's easy to come up with a list of benefits when working together as a group. Collaboration makes the task easier.*

Types of Assessment

Note to Trainer: *The purpose of this initial section is to provide a quick review and recall of learners' previously held knowledge of assessment in relationship to working with participants in a W-2 T placement. It is not meant as an exhaustive review of assessment policy, but rather as a discussion to set the stage for the rest of the class. You have discretion in how to facilitate this section. Some examples may include:*

- *Large group lecture,*
- *One topic assigned to each table group and then report out,*
- *Gallery walk, or*
- *Any other ideas you want to incorporate.*

 PPT 5

 PG 6-7

Assessment is not a new topic. It is something we discuss, do, and utilize daily. With that in mind, let's look at assessment through the lens of working with participants in a W-2 T placement who are working toward a goal of employment.

Informal Assessment

Discussion Points

- How do you define informal assessment?
Possible Answers:
 - *An ongoing process of collecting information about the participant's current situation*
 - *It encompasses conversation, forms, tests, and data.*
- How are informal assessment results beneficial to a participant in a W-2 T placement working toward employment?
Possible Answers:
 - *Informal assessment can incorporate goal setting exercises used to determine where the participant would like to be in six months, twelve months, etc.*
 - *Results can uncover a participant's skills, interests, and motivation for change.*

 **Formal Assessment****Discussion Points**

- How do you determine what a participant **can** do?
Possible Answers:
 - *A Formal Assessment provides one piece of the puzzle. You review the Formal Assessment results along with all of the other information gathered to-date to make the best possible determination on what activities are appropriate.*
 - *Sometimes it's a matter of being willing to try new things and adjusting plans based on how the activities work with accommodations incorporated and what seems to help the participant move closer to their goal.*
- What are best practices you have developed for understanding results and following up with the provider?
Possible Answers:
 - *Provide the provider with context on the program and how the results of the assessment will be used prior to the provider completing the assessment form. This can help the provider be clear on the depth of information to include.*
 - *Follow-up with the provider to ask questions and help interpret the results.*
 - *Utilizing strength-based language, talk with the provider about what the participant can do. Have a discussion about services, resources, and/or accommodations that could assist the participant in being able to fully participate in all that the W-2 program has to offer.*

 **PPT 6** **Vocational Assessment** Reference: W-2 Policy Manual, 1.2.3

The vocational evaluation process assesses the unique strengths, resources, and experiences of an individual in order to match that person's abilities and preferences to appropriate work placements, jobs, or training programs. The process is interactive; the intent is for staff to learn about the participant and the participant to learn about themselves, and other formal assessments.

Discussion Points

- How are you (your agency) using vocational assessment?
Possible Answers:
 - *To help determine specific work and daily life tasks and functions that a participant can do.*
 - *To supplement the results of other assessments like medical, career, and informal.*
- How can vocational assessment results move a participant closer to their employment goals?
Possible Answers:
 - *The results can help identify training or education that can help a participant move closer to an employment goal.*

 **Career Assessment****Discussion Points**

- What information does the participant obtain through a career assessment?
Possible Answers:
 - Skills, interests, values, aptitudes, etc.
 - Career pathways
 - Possible correlation to previous work history and their likes and dislikes.
- How do you use the results to bridge the gap between what the participant wants to do with the results of a formal assessment?
Possible Answers:
 - Career assessments provide a list of transferable skills that can be used to build a pathway to long term career goals.
 - The results can identify areas of training or education that a participant could pursue to help achieve a desired job goal.

Interpreting Assessment Scenarios Activity **PPT 7**

Purpose: To practice assessment interpretation by reviewing the results of a participant's WWP informal assessment, formal assessment, and career assessment.

Materials: Scenarios and assessment results in the PG Appendix A and B.

Estimated Length: 35 minutes

 PG 21-29 (Jinny Appendix A), 30-45 (Kylo Appendix B)

 TN 39-47 (Jinny Appendix A), 48-63 (Kylo Appendix B)

PPT Note to Trainer: After groups know what they are doing and have started working, click the PPT to show information regarding what each RIASEC trait means.

Directions to Trainer: Divide learners into groups of 4-6. Assign each group a scenario (Jinny or Kylo) located in PG Appendix A and B. Each group reads their assigned scenario and answers the questions provided. Groups need to be prepared to share their answers. Give the groups 15-20 minutes to work.

Trainer Instructions to Learners: In your groups, review your scenario and the participant's assessment results. After reviewing the assessments, answer the questions. Be prepared to share your answers at the end.

 **PPT 8**

Debrief: After all groups have completed their scenario, debrief by asking them to summarize their scenario and the answers to their questions.

Jinny:

What does Jinny's Mental Health Report tell us?

- *Has anxiety and depression*
- *Symptoms have gotten worse over past year*
- *Likely to impact her ability to work/complete activities*
- *Unemployment impacting mental health*
- *Accommodations needed*
- *Benefit from work experience and job readiness/life skills workshops*
-

What did her career assessments tell us?

- *High in Artistic and Conventional*
- *Likes to be creative and work with numbers*
- *Has some job preparation*
- *May enjoy working in child care, doing data entry, or in HR*

How can we use these assessment results to help Jinny develop goals and move toward employment?

- *Accommodations can be provided*
- *Per recommendations, add work experience and job readiness activities to EP*
- *Include weekly counseling as activity*
- *Try out work experience and/or training in fields of interest*

Kylo:

What does Kylo's Medical Examination and Capacity form tell us?

- *His condition will be life-long and only his symptoms can be treated.*
- *He takes medication daily that does have side effects and does go to weekly physical therapy. This is expected to continue indefinitely unless symptoms worsen.*
- *He can lift 20 lbs. occasionally, but no more than 10 lbs. frequently.*
- *He can stand/walk and sit for no more than 2 hours at a time.*
- *He has significant restrictions in his ability to twist and climb.*
- *Current treatment seems to be working but can affect his ability to participate.*
- *Accommodations are needed.*
- *Doctor recommends he doesn't overdo it even on good days, as that can make his symptoms worse.*

What did his career assessments tell us?

- *He ranked high in Realistic, Enterprising, and Social.*
- *He likes to work with his hands and working with both people and data.*
- *He feels like he has some job preparation.*
- *Many of his recommended jobs he can no longer do due to physical limitations; however, he does have a lot of experience. Discuss how he can use these abilities*

in other jobs (i.e., sales for mechanical parts, customer service for machinery, supervisor, etc.).

How can we use these assessment results to help Kylo develop goals and move toward employment?

- *Doctor recommends work experience, job skills training, job readiness workshops, and assisted job search*
- *Doctor recommended several accommodations for success, which can be integrated in his EP*
- *Can try out work experience/education in different fields of interest*
- *Because he will need retraining – would refer to educational needs assessment before making more recommendations*

Additionally, **ask**:


- What additional information would have been helpful?
Answers will vary
- What questions did you have regarding the formal assessment that you wish you could talk to the provider about?
Answers will vary
- How comfortable were you interpreting both the assessment results? If you do not use O*NET at your agency, what career assessments do you use?
Answers will vary
- What further assessments may be needed?
Possible Answers:
 - *Mental health report from Jinny's counselor*
 - *TABE assessment for Kylo*

Accommodations

 PPT 9

 PG 8

One piece of information that we may get from the various assessments we do is the need for accommodations. Accommodations allow participants to participate fully in the W-2 program. This is especially true for participants placed in a W-2 T placement. We want to address their barriers by incorporating accommodations.

 Reference: W-2 Policy Manual 4.1.0.

This may include:

- Obtaining needed medical treatment or counseling;
- Receiving needed services from other providers in the community;
- Ensuring participants have the necessary services, reasonable modifications and accommodations to successfully engage in assigned W-2 activities; and
- Working with employers to put needed accommodations into place for participants making the transition to employment.

We identify accommodations in a variety of ways, including:

- 🖱️ Assessments – formal assessments like the Medical Capacity or Mental Health Report Form(s) provides a solid place to start with identifying accommodations.
- 🖱️ Your co-workers – personal interactions from resource room staff, work experience supervisors, and/or job club facilitators can provide helpful observations about what works well for the participant in order to complete their tasks.
- 🖱️ The provider of the assessment – follow-up with the provider to have a conversation about the best ways for a participant to engage in activities.
- 🖱️ From participants themselves – participants know themselves, and often can identify what is going to work best for them.
- 🖱️ Our own personal observations – use your own interactions with the participant as a piece of the puzzle.
- 🖱️ Resources like the Job Accommodation Network, AskJan.org – if you are not already familiar with this resource, spend some time becoming familiar with it. The site has resources for individuals needing an accommodation, employers, and other professionals. They also provide a database of recommended accommodations.
- 🖱️ DVR may act as a consultant to the W-2 agency to identify specific accommodations and assistive technology to make work and training accessible to a W-2 participant.

Ask In what ways have you identified accommodations?

Answers will vary; however, ensure that learners' responses include the fact that accommodations are identified in a variety of ways, not just through formal assessments.

Ask Who can give me a testimonial of AskJan.org?

Answers will vary based on the learners.

Note to Trainer: *if there is time and if the room has internet access, pull up the AskJan.org website to do a walkthrough. Most agencies seem familiar with this already, so it may not be necessary.*

As you can see, there is more than one way to identify accommodations, and they are all valid ways to identify accommodations. Remember, no matter how or when it's identified, the accommodation must be documented.

Along with identifying accommodations yourself, another important piece of case management is assisting the participant in their own identification of accommodations. Empowering the participant to utilize resources like the Job Accommodation Network, can assist them in their own discovery.

Assisting a Participant Advocating for Themselves





AskJan.org has multiple resources for job seekers including:

- Online tools,
- Publications and resources,
- Pre-employment rights, and
- Information on finding a job.

It's important for the participant to know about the Americans with Disabilities Act of 1990 (ADA). The ADA requires employers to provide reasonable accommodations to employees and applicants. Although employers are required to provide reasonable accommodations, their obligations are not the same as the W-2 agencies. Employers are not legally able to ask about medical/mental health conditions due to this being a privacy issue. So, it is important for the participant to know how to advocate for themselves.


PPT 10

It can be unsettling for a participant to disclose a disability and a need for accommodations to an employer. Walk through this process with the participant. The following tips are adapted from AskJan.org.

-  Be sure the participant knows if and when to disclose a disability. If the participant needs a reasonable accommodation in order to apply for a job or perform a specific function of his or her job, it may be time to disclose.
-  The participant needs to know to whom to disclose a disability or need for accommodation. The company's human resource department is a good place to start. The HR manager, rather than the participant's supervisor, is the best source of information on EEOC practices and procedures. Remind the participant that they do not need to disclose to everyone. The participant's personal situation can remain private.
-  Assist the participant prepare their request. Again, there are many resources available for this including a sample letter on AskJan.org. Some general ideas include:
 - Identifying the specific job task for which the participant needs an accommodation,
 - Ideas for the accommodation they are requesting.
-  Help the participant research the type of accommodation they are requesting.

Incorporating Accommodations into the EP

PPT 11

 Reference: W-2 Policy Manual 1.3.3

After identifying accommodations and documenting them in WWP, incorporate them into the participant's Employability Plan. Provide accommodations for all the participant's assigned activities by filling out the appropriate form.

Providing Accommodations

Note to Trainer: *This is a 1-2-4-All discussion.*

PG 9

In your Participant Guide, **write** down what it means to provide an accommodation in order for a participant to be fully engaged in activities. (3 minutes)


Now, pair up with one other person from a different table. Are there any commonalities that you can see? (3 minutes)

Next, each pair should find another pair and form a group response to the question: What does it mean to provide an accommodation in the W-2 program? (5 minutes)

Accommodations are not always "big" things. Sometimes it can be something as "small" as providing a flexible work schedule so that the participant can complete activities during a timeframe that works best for them. Or, perhaps it's allowing the participant to step away from an activity to take phone calls from providers.

Services and Accommodations to Help You Do Your W-2 Activities Form

 Reference: W-2 Policy Manual 5.5.1.2

 **Review** the following policy with the learners.


As part of the process of revising the EP, the FEP must:

1. Provide the participant with a written description of any needed services, activities, and reasonable modifications or accommodations using the form, Services and Accommodations To Help You Do Your W-2 Activities (2564). If the FEP does not incorporate all the recommended accommodations or modifications into the participant's EP, the FEP must document on the corresponding WWP Participant Barrier page the reason(s) the recommendation(s) were not incorporated. Any placement change based on a

formal assessment must also be discussed with the participant and the participant's EP must be updated accordingly.

2. Advise the W-2 education, training, or work site providers of any needed reasonable modifications or accommodations to the W-2 education, training or work site. The W-2 agency must monitor the participant's performance at the W-2 education, training, or work site to ensure that previously specified services, modifications, or accommodations identified in the EP are provided.

Accommodations Activity

 TN 64-67 (Appendix C)

 PPT 12

Purpose: To identify possible accommodations for participants to assist them in successfully participating in the W-2 program and moving into the workforce.

Materials: List of accommodations from AskJan and Accommodation dice located in TN Appendix C, Smartphone with QR Reader installed, and paper.

Estimated Length: 25 minutes

Directions to Trainer: Divide learners into groups of 4-6. Give each group one set of dice, the accommodation list, and a piece of paper. One die contains potential limitations a participant may have, and the other die contains the type of accommodation they need to come up with. Every group needs at least one smartphone with a QR code reader installed. Have a QR Reader downloaded on your work phone to loan out if needed. Ensure groups know how to use their QR code reader prior to starting the activity. Have groups designate a recorder to write down accommodations that the group comes up with.

Groups roll the dice and scan the QR codes on the top of the dice to identify the potential limitations and needed accommodation, then brainstorm accommodations based on what they rolled; listing as many accommodations as they can think of. Next, reroll to identify a different combination of potential limitation and needed accommodation, then brainstorm accommodations based on that roll, and so on. Groups can choose to use the list of accommodations provided, search the site themselves, review the W-2 Manual, or come up with their own accommodations. Have the recorder write all accommodations down on paper.

After 15 minutes, have the groups share what they rolled, and the accommodations they provided. If no other group has the same accommodation, that group will get one point. The group with the most points wins.

Trainer Instructions to Learners: In your groups, take turns rolling the set of QR dice. One die contains limitations, and the other contains the type of accommodation you must come up with. Use your QR reader to scan the dice and record the potential limitation and type of accommodation needed on your paper. Develop as many accommodations as you can think of based on what you roll. Then reroll and come up with accommodations based on that new roll. Accommodations can work for various types of limitations and types. Do not duplicate the same accommodation for a different roll. You can use whatever resource you would like to come up with accommodations, including the W-2 Manual and the accommodations sheet provided. Record the accommodations your group comes up with and be prepared to share at the end. Each unique accommodation will earn your group a point, and the group with the most points at the end, wins.

Ask the following debrief questions:

- What resources did you use to come up with accommodations?
Potential Answers:
 - AskJan sheet/website
 - Google
 - W-2 Manual 1.3.3
- How comfortable were you coming up with your own accommodations?
Answers will vary
- What limitations or types of accommodations more difficult to come up with? Which ones?
Answers will vary
- How can you translate this to when you are working with participants?
Potential Answers:
 - Thinking “outside the box” to identify potential accommodations.
 - Work with others on my work team to identify accommodations when I get “stuck”.
 - Remembering that there are many different accommodations that could be provided. It’s not a one size fits all.

Collaboration

 PG 10

 PPT 13

Gathering and interpreting assessment results, and identifying and providing accommodations, do not need to be solo activities. You are not alone. W-2 is not the only program available to the participants you serve. Multiple providers may be working with participants to complete assessments. Other subject matter experts may be helping you interpret the results. And, participants work with many service providers who need to provide the accommodations identified. Again, you are not alone. Collaboration is an essential part of engaging with participants to create the best possible case management process.

Think of a time when you were working with a group on a big project, event, assignment, etc., and the outcome/result was good. **Write** down what the project was. Take a few minutes and answer the questions in your Participant Guide.

- What was your role in the project?
- How did decisions get made?
- How did you (the group) know the best course of action to take?
- What concrete steps made the outcome successful?

Ask What concrete steps made your collaboration efforts successful?

Potential Answers:





- *Working together as a team.*
- *Realizing I can learn something from each team member.*
- *Keeping an open mind.*
- *Active listening.*

Who's in Your Community?

 PPT 14

 PG 11

In your table groups, record those agencies or services with whom you collaborate. Your PG has a list started for you.

-  Division of Vocational Rehabilitation (DVR)
-  FoodShare Employment and Training (FSET)
-  Workforce Innovation and Opportunity Act (WIOA)
-  Aging and Disability Resource Center (ADRC)

 Let's do a shot out, with whom do you currently collaborate?

Now, individually, think about the community in which you work. In your Participant Guide you'll see some questions. Take some time to answer those questions.

What are two things you can start doing tomorrow to strengthen your collaboration efforts with these partners?

Answers will vary.

Ask Where is there a gap?

Possible Answers:

- *Answers will vary based on community*

Ask How can you bridge that gap?

Possible Answers:





- *Spend time collaborating with the resources you do collaborate with to identify creative ways to fill unmet needs.*
- *Current collaborators may know of information that is presently unknown to you.*
- *Participate in community events.*
- *Hold resource fairs to bring W-2 participants and other community resources together in the same room.*

Preparing Participants

 PPT 15

 PG 12

When you make a referral to another community resource, it is important that the participant knows what to expect. Provide the participant the following information:

-  The program/organization name
 - Name, location, hours, contact information
 - Flyers or brochures
-  The application process
 - The information the participant needs to provide
 - Documentation the participant needs to provide
 - Program requirements
-  Timeframe for getting into the program
 - Potential waitlists
-  Ways the W-2 agency, other organization(s)/resource(s), and participant will work together
- What the other program offers that the W-2 agency does not
 - Why the referral is needed/beneficial

Ask learners if they would like to share a success story of collaboration efforts.

Collaboration Activity

 PG 13

Purpose: To identify missed opportunities for collaboration and collaboration best practices.

Materials: Videos downloaded to computer. (Video scripts found in TN Appendix D)

Estimated Length: 30 minutes

Directions to Trainer: Play the first video, in which the W-2 Case Manager does not collaborate with DVR. Instruct learners to record their responses to the debrief questions in their PG after the video. Debrief as a group after learners record their responses.

Trainer instructions to Learners: We are going to watch a video with some missed opportunities for collaboration. Pay attention to what the Case Manager could have done better. After the video, answer the questions in your PG. Be prepared to share your answers.

 PPT 16

Note to Trainer: Play the downloaded video 1 on your laptop. Then return to the PPT.

1. What opportunities for collaboration were missed during Rhonda's meeting with her FEP?

Possible Responses:

- *Could have triangle appointments with DVR for current meeting and future meeting.*
- *Paid work experience hours counting for both programs.*
- *Career Assessments counting for both programs.*
- *Collaboration to see if Lacey knew if ADRC would be hiring anytime soon, or if it would be a possibility for Rhonda to be hired.*
- *Discussion of supportive services that could be split by the different programs.*
- *Discussion of accommodations DVR could help provide to make the Hometown Bank position work for Rhonda.*

2. What steps should Rhonda's FEP take to collaborate more effectively?

Possible Responses:

- *Get ROI signed to communicate with Lacey.*
- *Touch base with Lacey prior to meetings and on an ongoing basis.*
- *Review any work already completed with Lacey (career assessments, work experience, etc.)*
- *Offer triangle appointments with DVR program.*

 PPT 17

Note to Trainer: Play the downloaded video 2 on your laptop. Then return to the PPT.

Directions to Trainer: After debriefing the first video, play the second video, in which the FEP and DVR Business Services Consultant (job developer) collaborate. Instruct learners to record their responses to the debrief questions in their PG after the video. Debrief as a group after learners record their responses.

Trainer Instructions to Learners: Now we are going to watch another video. Pay attention to how Rhonda's FEP and DVR Business Services Consultant (job developer) are collaborating. After the video, answer the questions in your PG. Be prepared to share your answers.

1. How did Lacey and Rhonda's FEP collaborate effectively?

Possible Responses:

- *Met prior to meeting with Rhonda to develop a plan for the day's meeting.*
- *Worked together to determine Rhonda's needs and provide assistance.*
- *Worked together to discuss potential job opportunities with Rhonda so she was the one making the decisions.*
- *Shared information and plans to better serve Rhonda.*

2. How do you think Rhonda is better served by Lacey and her FEP collaborating?

Possible Responses:

- *Doesn't have to try to get to multiple appointments.*
- *No duplication of efforts, activities, and services.*
- *Same set of activities, so it is more likely that Rhonda will be successful.*
- *Less overwhelming and more supportive for Rhonda.*

3. How can you incorporate more collaboration into your case management?

Possible Responses:

- *Offer triangle appointments with co-enrolled participants.*
- *Always get ROIs signed and have consistent communication with other Case Managers/job developers.*
- *Keep accurate comments and review them often.*
- *Set reminders, such as Worker Tasks, if participant is going to start other activities with different programs that can be counted for W-2 as well.*
- *Reach out to other programs in the area to discuss potential collaboration efforts and referral opportunities.*

Engagement Strategies

 PG 14

There are myths and misconceptions related to W-2 T participants and their participation in the W-2 program. These myths range from the number of hours that participants can be assigned each week, to the types of activities that can be on their Employability Plan (EP). Engagement starts by understanding assessment results, providing accommodations, and collaborating with our partners. It's putting together all of the different pieces we've discussed so far.

 PPT 18

In this section, we will discuss the flexibility that the W-2 T placement offers both the participants and the FEP, and how this flexibility allows the participants to be engaged in work and training activities that bring about change in their lives.

Think back to the opening activity, Understanding Change.

Ask learners the following questions about change:

How do you feel when you are facing change?

Possible Responses:

- *We can react with some combination of fear, anxiety, excitement, anger, hostility, and denial.*

What might participants in a W-2 T placement feel when facing change?

Possible Responses:

- *They will probably feel the same way; with a sense of fear, anxiety, excitement, anger, hostility, and denial.*

Change means leaving a comfort zone. It can be a struggle to face fears and overcome barriers while trying to find the strength and resources to make change happen. The outcome of W-2 Case Management is to help participants become more self-sufficient. To do this, you need to have practical ideas that can help you. One strategy you can incorporate is motivational interviewing.

Motivational Interviewing

 PPT 19 PG 14-16

PPT Note to Trainer: Click when directed below to bold them on the screen to help learners follow where you are. This also will change the PG number on the screen if applicable.

Motivational interviewing, commonly referred to as “MI”, is an approach used by practitioners in health care, counseling, education, and other arenas that involve working with individuals to help them make changes. It’s a goal-oriented conversation focusing on a target behavior with special attention paid to the language of change.

Although motivational interviewing incorporates many strategies, today we will focus on one: OARS.

OARS refers to skills that are useful in responding to what people say. It’s an acronym for:


O – Open Questions

A – Affirmations

R – Reflections

S – Summarizing

Open Questions

 Open questions are those not easily answered with a “yes” or “no” response. They draw out a participant’s perspectives, experiences, and knowledge. They invite elaboration and deeper thinking. Open questions encourage participants to be actively involved in the case management process. This engagement strategy is simple to incorporate in many situations.

Creating Open Questions Activity

Purpose: To practice reframing common case management questions as open questions.

Materials: Questions in the TN and PG.

Estimated Length: 5 minutes

Directions to Trainer: Give learners 3 minutes to answer individually the questions in their PG. After 3 minutes ask for a shout out of answers.

Trainer Instructions to Learners: In your Participant Guide, rewrite each of the questions so it is an open question. I’ll give you 3 minutes to work on this.

Go through the possible answers to each question. Remind learners that tone and inflection may affect what participants hear us saying. **Add** additional points as needed.

1. Do you want to work outside the home?

Possible Response:

Tell me why you want to work outside the home.

2. Do you want to be self-sufficient?

Possible Response:


What does being self-sufficient look like to you?

3. Did you call Jane to let her know you weren't going to attend Job Club?

Possible Response:

What is the best way to let Jane know when you aren't going to make it to Job Club?

Affirmations

 Affirmations are statements that notice and appreciate a participant's strengths. They help build rapport with the participant. Through affirmations, a participant can start to see themselves in a positive light and begin to believe that change is possible. You may be the only person telling the participant something positive.

Affirmations may sound something like:

- This is hard work you're doing.
- You care a lot about doing the job well.
- You want to reach your goal.
- You want to be a role model for your kids.

Some examples of affirmation statements could look like this:

1. Why do I have to look for a job? I just want to focus on school right now.

Possible Response:


You place a high value on your education.

2. I know I could work, but I need an employer who will accept me for who I am.

Possible Response:

You know that obtaining work is a goal you can reach.

Reflections

 Reflection is probably the most important and frequently used skill in MI. It allows the participant to steer the conversation and you to discover their motivation.

To form a reflection, you need to:

1. Hear what the participant is saying.
2. Make an educated guess about the participant's underlying meaning, energy, or emotion.
3. Choose your direction (what will you respond to?).
4. Make your reflection as a statement, not a question.

A reflection can be either simple or complex. A simple reflection involves repeating the same words or rephrasing them slightly. A complex reflection involves paraphrasing the participant's statements. It infers a meaning, reflects a feeling, or uses a metaphor.

Reflections may begin with:

- It sounds like you...
- It seems to you that...
- From your point of view...
- For you, it's a matter of...
- You mean that...
- You're wondering if...
- You're feeling...
- You must be...
- So you...


Let's look at an example.

"Yeah, I missed a couple of days at the worksite. I just can't make it every day with what I'm dealing with. Everyone misses once in a while."

Simple: You are dealing with a lot.

Complex: You feel like missing work hours doesn't make you different from other people.

Summarizing

 Summarizing is a recap of all or part of what a participant said in a conversation up to that point. Summaries highlight a participant's stated motivations, reasons for change, and perceptions of risk for the status quo. It also is an opportunity for the case manager to check for understanding and for the participant to clarify anything missed in the interaction.

Let's put all of these OARS together and see how they can work in an actual conversation. Listen for each of these strategies. When you hear one, give a thumbs up.

Note to Trainer: *Both trainers read the following conversation; one reads the FEP, and the other reads the participant. Periodically pause to **ask** learners what they heard. Paddleboards or other props can be used instead of a thumbs up if trainers have them available. If using a prop, be sure to inform class how to indicate when they hear an OARS strategy.*

FEP (F): Tell me why attending the training program is important to you now. **(Open Question)**

Participant (P): What do you mean?

F: What is it about right now that makes it feel like it's the right time? **(Open Question)**

P: I can't do the work I was doing before. The training program would probably be a way for me to learn something new.

F: You're really thinking ahead. That shows foresight. **(Affirmation)**

P: Yeah. I need to do something. I have to be able to support my family.

F: Providing for your family is something that's on your mind right now. **(Reflection)**

P: I don't want my mom to feel like she needs to help out so much. As it is, she's always buying the kids the things they need for school. I want to take care of my family. I'm the parent, not my mom.

F: You don't want to rely on your mom anymore. You're the parent. It upsets you that you aren't taking care of the things you feel a parent should be taking care of. **(Reflection)**

P: Right. I feel like I'm at a roadblock right now. I want to be doing something, I just need to figure out what I can do. It's just overwhelming sometimes.

F: Let me see if I've got this so far. Enrolling in the training program would give you the ability to learn something new to get back into the workforce. And, perhaps, it will lead to some financial independence from your mom. It's a way for you to be the parent you want to be. Did I miss anything? **(Summarizing)**

P: No, that sounds right.

Engagement Through Meaningful Activities






 PPT 20 PG 16

Just as your conversations and using tools like OARS is an engagement strategy, so are the activities you assign.

An important aspect of the W-2 T placement is its flexibility. There is no policy requirement for hours of participation for participant in a W-2 T placement. Participants can be assigned **up to 40** hours a week like participants in other W-2 placements.

Participants are in this placement for a reason. A barrier or limitation is affecting their ability to move into full-time unsubsidized employment. Full engagement means that you should be addressing that barrier when assigning activities. Take a close look at participants' current situations. Ask them to identify their goals, and where they would like to be. Create an individualized plan with the participant that assists them in reaching those goals. This leads to a higher level of engagement and helps bring about the needed change.

Addressing barriers may seem like an overwhelming task, especially when multiple barriers are presenting themselves at the same time. There are important points to remember. As we go through these points, write down in your Participant Guide the things you most want to remember.

-  You are not alone
- You are not expected to be an expert in everything
-  Community resources are available to help
- Overcoming barriers takes time
-  You are responsible for the process
-  The participant is responsible for the outcome
- Ongoing assessment and support are needed
-  Adjust the process (activities) as the situation changes

All of these are key elements in maintaining engagement and making progress in reaching the participant's goals.

Activity Engagement

Each activity should have a specific purpose in moving toward the end goal. Because each participant is an individual with a unique situation, each EP needs to be able to address that uniqueness. The flexibility of this placement allows that to happen.

Ask What specific things may influence activity assignment for a participant in a W-2 T and their ability to engage in those activities?

Possible Responses:

- *Medical diagnosis*
- *Whether it is the participant or a family member who has the barrier(s)*
- *Level of perceived family or community support*
- *Expected timeline for overcoming the barrier*
- *The type of barrier or limitation*

Note to Trainer: *Instead of reading the following bulleted list, you can use a wide range of activities to engage learners. How you facilitate the discussion is up to you. Some options include asking learners what is most important to them, what they would add to this list, what the bulleted point means to them, etc.*

When engaging participants in their activities keep the following in mind:

- Daily, weekly, and/or monthly activities in which the participant is already involved and/or required to participate.
- Making a clear connection between assigned activities and the participant's goals.
- Ensuring assigned activities relate to helping the participant overcome barriers and limitations.
- Services and accommodations the participant needs to complete activities.
- Outside influences affecting participant.
- The uniqueness of the individual and their family situation.
- The participant's current level of ability.

Activity Engagement Brainstorm Activity

 PPT 21

PPT Note to Trainer: Click to display each of the five below as you are debriefing them. They will display in order as shown in TN.

Purpose: To develop creative ways in which to use W-2 activities to engage participants.

Materials: Prepared flip chart paper (one for each of the five activities), multiple cards with the activities listed on it, markers.

Estimated Length: 10 minutes

Directions to Trainer: Have five pieces of flip chart paper hung around the room. Each piece of flip chart paper should have one activity title listed at the top (Work Experience, Employment Search, Job Readiness/Motivation, Career Assessment, Education and Training). Write one example of an engagement strategy on each flip chart to assist groups thinking in the right direction. Randomly hand out cards to each learner to mix up groups. Each card will have one of the activities listed on it. The learner goes to the corresponding flip chart paper. Groups brainstorm ways in which to use the activity to engage a participant in change and moving toward a goal. Give learners 5 minutes.

Trainer Instructions to Learners: I will give you a card with an activity listed on it. Go to that flipchart paper. As a group, come up with concrete ways in which you can use that activity to engage a participant in making a change and taking steps toward a goal. Nominate a spokesperson. I'll give you 5 minutes.

Debrief by having each group's spokesperson share their engagement strategies. **Add** additional points as needed.



Work Experience

Possible Responses:

- *Worksite should be determined after career assessment in order for it to align with a participant's interests, skills, and values. This creates a deeper buy-in to the value of the work experience.*
- *Encourage the participant to be involved in identifying the work site. This can offer them a sense of pride and "ownership".*
- *Encourage the participant to add to their resume the new skills and experiences he or she obtains through the work experience. This shows growth.*
- *Offer affirmations for a job well done.*
- *Work with the participant to develop goals for the work experience. Encourage the participant to "check-off" those goals as they are reached.*
- *As the participant progresses, the tasks and or sites should be adjusted.*



Employment Search

Possible Responses:

- *Ask the participant to complete a Personal Data Record. This tool organizes the participant's work history, education, references, etc., thus making the application process easier.*
- *Assign employment search in incremental "baby steps" to allow for the most possible successful completion of hours. Allow for structured employment search at the job center to allow for assistance from resource room specialists.*
- *Allow the participant autonomy in where they apply for jobs. Allow the participant to be responsible for the outcomes.*
- *Collaborate with DVR, WIOA, Job Center staff, and job developers to assist the participant in his or her job search and to connect him or her to all of the available resources.*

- *Identify employers with a history of working with people who have barriers to employment.*

 **Job Readiness/Motivation**

Possible Responses:

- *Give the participant the opportunity to pursue activities that are of most interest to them.*
- *Bring in “program graduates” to Job Club to offer encouragement and hope to participants currently in the program. Mentoring activities can provide peer-to-peer support.*
- *Offer Group Case Management to create a support and accountability network among participants.*
- *Be creative with at home activities to give participants flexibility in when and how they complete activities.*

 **Career Assessment**


Possible Responses:

- *These assessments provide guidance on career pathways, potential training opportunities, and job availability. That guidance allows development of additional activities uniquely based on the participant.*
- *Career assessments help participants learn about jobs that fit them - their interests, skills, and values.*

 **Education and Training**

Possible Responses:

- *These activities propel a participant to future career goals.*
- *Developing goals for education and training activities can be another way to offer encouragement to the participant when he or she meets goals.*
- *Short-term job skills trainings allow the participant to learn a new skill that is especially important if, due to their barrier, the participant cannot return to their previous type of work.*

 PPT 22 PG 17 Reference: W-2 Policy Manual 7.3.1

Webcast Recording: Custodial Parent TEMP Case Management

Webcast: Trial Employment Match Program (TEMP) Policy and Process Overview

The Trial Employment Match Program (TEMP) provides subsidized work for W-2 participants who need additional support to transition to paid employment. Progressing from a W-2 T placement to a TEMP job can be an especially beneficial way to engage participants who:

- Require a flexible schedule or other reasonable accommodations;
- Lack sufficient work skills; and
- Have little or no recent work experience, or a poor work history.

Ask How can participants benefit from TEMP?*Possible Answers:*

- *Participants are working in an environment that accommodates their needs.*
- *The new skills participants learn provide a pathway to employment.*
- *Work can build self-esteem.*
- *It is job experience that can provide a reference and be included on a resume or application.*





Ask How can you prepare participants who may be transitioning into a TEMP position?*Possible Answers:*

- *Work on a household budgeting sheet to prepare the participant for the difference in household income on a W-2 T payment vs. TEMP payment.*
- *Discuss with the participant their questions, concerns, excitement, etc. over making a change and strategies the participant can use to manage change.*
- *Explain how TEMP can be a transitional steppingstone to unsubsidized employment.*
- *Ensure the participant understands the difference between TEMP and a temporary job.*
- *Look at the potential for the participant's work experience site to become the participant's TEMP employer transitioning the participant to more advanced or additional duties.*

Summary


 PPT 23

We've discussed many ways to engage participants in making change and progress toward a goal. Remember:

-  Participants overcoming barriers, making life changes, and changing behaviors is a process.
-  It may take a long time, and you are not in control of the outcomes. That is up to the participant. What you are in control of and responsible for, however, is the process.
-  Baby steps make up the process for the participant to get from Point A to Point B.
-  Offering the needed supports and supervision, assessing participant progress, and potentially adjusting the process along the way, are crucial in ensuring that participants stay engaged and reach their goal.

Let's put this all together.

Engagement in Practice Activity

 PPT 24 TN 76-112 (Appendix E) PG 46 (Appendix C)

Purpose: To put into practice today's learning about assessment, collaboration, and accommodations, and use that information to effectively engage participants.

Time: 60 minutes

Materials:

Printed copies of formal assessments – Mental Health Report and Med Cap forms in Appendix

Printed copies of career assessments – in Appendix

Printed copies of vocational assessments – in Appendix

Printed decisions and options– in Appendix

Printed RIASEC sheet – in Appendix

Painters tape

Envelopes

Set Up: Hang all nine decisions around the room with enough space around each one for groups to gather. Tape two envelopes with the options labeled on the outside under decisions one through eight. Print the options from TN Appendix E and place inside the designated envelopes. Ensure there is enough for every group. If space allows, set up two different stations for Decision One to avoid congestion. One trainer should have one pile of the Mental Health Reports and one pile of the Med Cap forms. The other trainer should have one pile of vocational assessments and one pile of career assessments. Have printed Decision Nine sheets located in the Appendix for learners to record their activities and accommodations.

Directions to Trainer: Instruct learners to divide into groups of 2-3. Encourage groups to be diverse in specialty and length of time in position. All learners have Serina's informal assessment information in Appendix C. Groups go to each decision and choose one of the two options provided, and review the information provided based on that option. For decisions one, two, five, and six, learners come to you for the assessments. When distributing assessments, ensure that each group gets a career assessment. If a group chooses to complete a vocational assessment first, inform them that they must come back for the career assessment in their next decision. The last decision (nine) requires learners to develop activities and accommodations based on what they discovered throughout their decisions. Learners need to be prepared to share this final decision. Give groups 45 minutes to work.

Trainer Instructions to Learners: In your groups, review Serina's informal assessment located in Appendix C of your Participant Guide. Then, starting at decision 1, go around the room to make a series of decisions regarding Serina and your group's plan on managing her case. Go in order when making decisions and select only one option per decision. You will have the opportunity to select the other option in future decisions. Once you select your option, move to a different part of the room so that the next group can make their decision. Some decisions require you to come see us to get further information. Keep engagement in mind as you make your decisions and be prepared to share your final decision regarding activities and accommodations at the end.

Debrief: After all groups have finished all their decisions, debrief by asking them to share what they decided regarding activities and accommodations.

Possible activities include:

- *AODA Counseling (CA) to incorporate weekly counseling appointments and daily Suboxone treatment*
- *Physical Therapy (PR) to incorporate weekly PT hours*
- *Parenting Classes (PA) to incorporate weekly classes with Child Welfare Worker*
- *Work Experience (WE) to develop/practice strategies recommended by vocational assessment and to fulfill community service hours needed for Probation*
- *On-the-Job Training if being completed with WIOA or DVR*
- *Workshops/classes (LF or MO) to work on time management, concentration skills, and memory skills*
- *Home visits and custody hearings (LA) to incorporate check-ins after custody is established outside of weekly parenting classes*
- *Job Skills Training (JS) based on interests*

Possible accommodations include:

- *Flexible scheduling to work around pain*
- *Private workstation for when work needs to be completed without distraction*
- *Modified break schedule for when she needs to move around*
- *Planners to schedule activities for poor memory*
- *Provide verbal and written instructions*
- *Audio recorder for instructions and to help remember activities*

Then **ask:**

Although we didn't assign activities and accommodations until the end, in the "real world" you would be doing this along the way. What activities and accommodations would you have assigned right away after Serina's informal assessment to start getting her engaged?

Possible Answers:

- *AODA counseling/Suboxone treatment*
- *Parenting classes*
- *Flexible scheduling*

How would Serina's engagement be affected if you had collaborated, but not completed assessments (e.g., formal or vocational)? What about if you would have done assessments, but not collaborated?

Possible Answers:

- *Wouldn't have had entire picture to work with.*
- *If collaborated without assessment, wouldn't have known where to go.*
- *If would have done assessment without collaboration, Serina might have been overwhelmed and not engaged as much.*

For groups that decided not to complete all assessments, what information may have been missed?

Possible Answers:

- *Physical therapy from Medcap*
- *Suggestions from vocational assessment*

Based on the steps we took, Serina is probably very engaged now. How would you keep her engaged?

Possible Answers:

- *Continual follow-up check ins and adjustments*
- *Additional assessments as needed*

This activity focused on engagement through meaningful activities. How could have you used our other engagement strategies with Serina?

Possible Answers:

- *Motivational interviewing to spark change*

Documentation

 PPT 25

 PG 18

All strategies for engagement include multiple steps and decisions that you are making. Documenting each phase of the engagement process records what you are learning about the participant's successes and problems. Documentation helps you see the process in phases, and as a whole, so that you can plan strategies for influencing change.

System Documentation

 Reference: Operations Memos 18-19, 18-17

There are multiple ways for you to record a participant's progress and document their engagement. Each way is one piece of the puzzle in telling the participant's story.

System Documentation Activity

Purpose: Learners will share their knowledge of system documentation.

Materials: Flip chart paper or white board, poster markers or dry erase markers.

Directions to Trainer: Give each table group 10 minutes to answer the following question for each system used. Have them record their answers in their Participant Guide. After 10 minutes, debrief by picking a table group to share their responses for one of the systems. After they share, invite other table groups to add anything new of value. Record responses on a flip chart paper or white board.





Trainer Directions to Learners: In your table groups, answer the question: In what ways is each system used to document part of the engagement process? You have 10 minutes. Be prepared to share your responses.

☀ PPT 26

PPT Note to Trainer: As you debrief, click through for additional screenshots. Screenshots/systems will display in order as in TN.

WWP

Possible Responses:

- *Formal assessment information and recommendations are recorded.*
-  *Employment likes and dislikes can be recorded.*
-  *Accommodations that are provided in order for a participant to fully engage in their activities.*
- *Progress to educational goals can be tracked and discussed as a motivator.*
-  *PIN Comments tell the participant's story. You can go back and remind the participant how far they have come.*
- *You can justify your placement decision and rationale behind the assigned activities.*
-  *Progress toward goal completion can be tracked on the Goals page by marking Goal Steps as Completed.*
- *Additional hours and/or activities added to EPs can show growth and progress.*

☀ PPT 27

ECF

Possible Responses:

- *Confidential notes or conversations with other collaborators can help tell a participant's story and progress.*
- *New formal assessments can show increased ability for participation.*
- *Ensure appropriate documentation of activity completion.*

Wrap Up

High Five Activity

 PPT 28 PG 19

Purpose: To start translating classroom learning into ways learners can use the information when they get back into the office.

Materials: Small post-it notes.

Estimated Length: 15 minutes

Directions to Trainer: Have learners think about what they found helpful, found surprising, or hope to incorporate from what they learned today. Have them transfer their thoughts onto post-its and put the post-its on their hands; one post-it for each finger. Give them five minutes to do this. Learners then go around the room high fiving or fist bumping with one another and swapping their ideas. Give them five minutes to swap ideas. After the five minutes, ask for volunteers to share a post-it(s).

Directions to Learners: Today we covered interpreting assessments, incorporating accommodations, effective ways of collaborating with community partners, and engaging participants in a W-2 T placement. Think of 3-5 things that you found helpful, found surprising, or hope to incorporate when you get back to the office. Then transfer your ideas onto small post-its (one thought per post-it).

Now put the post-its on your hand, one post-it per finger. When I say go, stand up, go around the room, and find a colleague. Give them a high five or a fist bump for staying engaged throughout the day and look at their post-its. Take one of their post-its that also applies to you, and they will take one of yours. Then find another colleague and repeat the process. Keep doing this until I call time.

Think back to your original thoughts and the post-its you currently have. Is anyone willing to share what was helpful, what was surprising, or what you hope to incorporate?

Conclusion

Note to Trainer: *If there is time, bring up other trainings that are available related to this course, such as the Participant Motivation for Change course, TEMP webcasts, W-2/DVR webcasts, etc.*

Thank you everyone for your participation! Please complete your evaluations before you leave.

Trainer's Notes Appendix

Appendix A: Jinny Moore

Jinny is a 29-year-old single parent with three children, ages 11, 7, and 4 years. She has been in a W-2 T placement for about one month.

Jinny speaks English. She knows some Spanish slang from her friends, but doesn't feel fluent reading, speaking, or writing the language. She worked in manufacturing on and off for the past five years. Jinny found it boring and did not like it. She worried that she wouldn't assemble the equipment correctly or would do something wrong, which would cause someone to get hurt. She has no other volunteer or work history. Jinny received her High School Diploma 11 years ago but reports no post-secondary education. She has never been involved in any other work programs, has never been in the military, and reports no legal issues. Jinny and her children live with her mother. It is a stable arrangement for now. Prior to living with her mother, she rented an apartment for three years, but was evicted six months ago for not paying rent. Her mother watches the children when Jinny asks, but she does not have a back-up plan if her mom is unavailable.

All three of Jinny's children have the same father, who passed away in a car accident shortly after her youngest child was born. Jinny states that she does not like driving because she gets severe anxiety due to what happened to him. Even though she does not like to drive, she does have a valid driver's license. She usually walks or gets a ride from her mom. She would prefer a job close to home so that she can walk to work. Jinny does report mental health issues and is receiving treatment for them. Nobody in the family is receiving SSI or SSDI and Jinny states she is not interested in learning more about SSI/SSDI at this time. No other family barriers are reported.

What does Jinny's Mental Health Report tell us?

What did her career assessments tell us?

How can we use these assessment results to help Jinny develop goals and move toward employment?

DEPARTMENT OF CHILDREN AND FAMILIES
Division of Family and Economic Security

WPM

MENTAL HEALTH REPORT

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

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

Participant Name	Date of Birth	Social Security Number
Jinny Moore	10/28/1990	125-555-5566

Name of Professional Provider		Professional Title	
Annabelle Zavala, MD		Psychiatrist	
Office Address	City	State	Zip Code
14555 W National Ave	New Berlin	WI	53151

Dear Mental Health Professional,

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

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

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

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

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

1. How frequently is the patient scheduled to meet with you?
Every other month

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

When is your next scheduled appointment with this patient? Two months

2. Are you aware of any other health care professionals who are currently treating this person? If yes, please identify provider name and purpose of treatment: Counselor, Nelson O'Ryan, for weekly therapy

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

Axis I: 296.32, 300.02 Axis IV: Unemployment

Axis II: _____ Axis V: Current GAF: 44

Axis III: _____ Highest GAF Past Year: 60

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

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

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

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

- rarely occasionally frequently constantly

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

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

If yes, please list:

Anxiety medication (Lexapro), antidepressants (Prozac)

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

Drowsiness, dizziness, nausea, dry mouth

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

Four years ago

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

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

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

If so, please explain:

11. When completing the chart below:

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

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

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

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

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

13. On the average, how often do you anticipate that your patient’s impairments would become acute so that the patient would be absent from work and other W-2 activities?

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

14. Has there been any recent acute episodes? If yes, please explain and give dates:
N/A

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

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

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

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

16. Is the patient attending scheduled appointments? Yes No

If no, please explain and list missed appointment dates:

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

17. What kind of treatment plan is the patient involved in? What is the expected outcome?
Daily medication and weekly therapy sessions with counselor. Outcome is expected to improve and she will be able to function independently without the need of weekly therapy within the next six months. Medication is expected to continue for over a year.

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

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

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

19. What type of environment or conditions could help this person function most effectively in a variety of daily activities? Slower paced, low stress environment that allows the flexibility of frequent breaks when needed.

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

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

If no recommendations, please explain:

21. Estimate the hours a day (5 days a week) this individual can participate in work/work readiness activities within these recommendations? 40 hours a week as long as accommodations are provided

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

Name of Professional Provider	Title	Telephone Number
Annabelle Zavala, MD	Psychiatrist	262-845-5514
Signature of Professional Provider		Date Signed
<i>Annabelle Zavala</i>		3/31/2019

Return completed form to:

Name of Agency Representative		Address		Date Sent
Wendy Williamson		892 Main St		03/01/2019
City	State	Zip Code	Telephone Number	Fax Number
New Berlin	WI	53072	262-145-2222	262-145-3333

O*NET Interest Profiler: Career List at My Next Move

<https://www.mynextmove.org/explore/ip-print?t=o&z=2&i=0...>

O*NET Interest Profiler: Career List

Your interest results:

Realistic	7
Investigative	6
Artistic	32
Social	19
Enterprising	4
Conventional	36

Your Job Zone:

Job Zone
Two
Some Preparation
Needed

Careers that fit your interests and preparation level:

 Best fit  Great fit

-   Costume Attendants
-  Childcare Workers
- Correspondence Clerks
-  Insurance Policy Processing Clerks
-  Nannies
- Payroll & Timekeeping Clerks
- Photographic Process Workers & Processing Machine Operators
- Postal Service Clerks
- Sewers, Hand
- Word Processors & Typists

Other careers that fit your interests:

Job Zone One: Little or No Preparation Needed

 Best fit  Great fit

-  Baristas
-  Combined Food Preparation & Serving Workers, Including Fast Food


O*NET Interest Profiler: Career List at My Next Move

<https://www.mynextmove.org/explore/ip-print?t=o&z=2&i=0...>

- Counter & Rental Clerks
- ★ Food Preparation Workers
- Graders & Sorters, Agricultural Products
- Models
- Pressers, Textile, Garment, & Related Materials



Job Zone Three: Medium Preparation Needed

 Best fit  Great fit

-  Court Reporters
- Cooks, Private Household
- Desktop Publishers
- Electronic Drafters
- Library Technicians
- ★ Medical Records & Health Information Technicians
- Medical Transcriptionists
- Music Composers & Arrangers
- ★ Secretaries & Administrative Assistants
- ★ Teacher Assistants

Job Zone Four: High Preparation Needed

 Best fit  Great fit

-  Proofreaders & Copy Markers
-  ★ Interpreters & Translators
- Career/Technical Education Teachers, Middle School
- Document Management Specialists
- ★ Elementary School Teachers
- Multimedia Artists & Animators
- Social Science Research Assistants

O*NET Interest Profiler: Career List at My Next Move

<https://www.mynextmove.org/explore/ip-print?t=o&z=2&i=0...>

- Special Education Teachers, Kindergarten & Elementary School
- ★ Technical Writers
- ★ Training & Development Specialists

Job Zone Five: Extensive Preparation Needed

🌟 Best fit 🌟 Great fit

- ★ Architecture Teachers, Postsecondary
- Art Therapists
- ★ Art, Drama, & Music Teachers, Postsecondary
- ★ Communications Teachers, Postsecondary
- Computer Science Teachers, Postsecondary
- ★ English Language & Literature Teachers, Postsecondary
- Graduate Teaching Assistants
- Librarians
- Library Science Teachers, Postsecondary
- Mathematical Science Teachers, Postsecondary

Special Notice: Proper Use of O*NET Interest Profiler Results

You **should use** your **O*NET Interest Profiler** results to explore the world of work and identify careers that may satisfy what is important to you in a job-your interests. You will be able to look at the interests satisfied by careers and compare them to your own interests. Talk to a vocational/employment counselor or teacher for more help on how to use your **O*NET Interest Profiler** results.

Your **O*NET Interest Profiler** results **should not be used** for employment or hiring decisions. Employers, education programs, or other job-related programs should not use your results as part of a screening process for jobs or training.

If you think that your **O*NET Interest Profiler** results are being used incorrectly, talk to your vocational/employment counselor, teacher, or program administrator. You also can contact the National Center for O*NET Development for assistance.

National Center for O*NET Development
 Attention: Customer Service
 P.O. Box 27625
 Raleigh, NC 27611
 Email: [O*NET Customer Service \(onet@onetcenter.org\)](mailto:onet@onetcenter.org)

Appendix B: Kylo Philip

Kylo is a 45-year-old single parent with a fourteen-year-old child. Kylo applied for W-2 after exhausting his savings when he lost his job.

Kylo reads, writes, and speaks English. He had a good job that he loved, working for Oshkosh Truck for 21 years in the equipment maintenance department. Prior to that, he was in the Army for six years as a 12N (heavy equipment operator). He had an honorable discharge. Those were the only jobs he has ever done, and he doesn't know what else to do. Kylo barely passed high school but does have his diploma. He has no legal issues and has owned his house and vehicle for several years. All of his utilities, vehicle registration, and insurance are current.

Kylo has Fibromyalgia and has been unable to work since his diagnosis. He does want to work again and is not interested in learning about SSI/SSDI at this time. There are no other family barriers. Kylo does not have any other children and has no contact with his ex who left when he was diagnosed with Fibromyalgia.

What does Kylo's Medical Examination and Capacity form tell us?

What did his career assessments tell us?

How can we use these assessment results to help Kylo develop goals and move toward employment?

DEPARTMENT OF CHILDREN AND FAMILIES
Division of Family and Economic Security

WME

MEDICAL EXAMINATION AND CAPACITY

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

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

Participant Name Kylo Philip	Date of Birth 04/13/1974	Social Security Number 024-885-6631
--	------------------------------------	---

Name of Professional Provider Dr. Leyton Schwartz		Professional Title Rheumatologist	
Office Address 1855 S Koeller St	City Oshkosh	State WI	Zip Code 54902

Dear Health Professional,

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

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

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

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

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

1. How frequently is the patient scheduled to meet with you?
Once a month

- Regarding current course of treatment, how long have you been meeting with this patient?
One year

- When is your next scheduled appointment with this patient?
Two months

2. Are you aware of any other health care professionals who are currently treating this person? If yes, please identify provider name and purpose of treatment:
Dr. Stuart Woody, primary care physician

3. Diagnosis/Condition: Fibromyalgia

4. Prognosis: (if the patient's condition is related to pregnancy, please enter the expected date of birth)
No cure, will continue to treat symptoms for better quality of life

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

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

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

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

6. What kind of treatment plan is the patient involved in? What is the expected outcome?
Daily medications to help control pain and weekly physical therapy to maintain strength and flexibility. Expected to continue current treatment unless symptoms worsen.

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

7. What type of environment or conditions could help this person function most effectively in a variety of daily activities? A slower paced, stress-free or low-stress environment

8. This individual may have his/her vocational capacity assessed. What, if any, accommodations should be provided for the assessment? Morning or mid-day assessment as that is when Kylo reports having the least amount of pain.

9. Is the patient attending scheduled appointments? Yes No

If no, please explain and list missed appointment dates:

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

Yes No

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

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

11. Physical Capacities

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

No limitation 100 lbs. 50 lbs. 20 lbs. 10 lbs. Other _____

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

No limitation 100 lbs. 50 lbs. 20 lbs. 10 lbs. Other _____

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

No limitation no more than 6 hours no more than 2 hours Other _____

How many city blocks can this individual walk without rest or severe pain? Three blocks

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

No limitation no more than 6 hours no more than 2 hours Other _____

For questions 12-14 below, "rarely" means 1%-5% of an eight-hour workday; "occasionally" means 6%-33% of an eight-hour workday; and "frequently" means 34%-66% of an eight-hour workday.

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

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

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

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

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

14. If your patient's symptoms interfere with performance of simple work task, please estimate the frequency of interference?
 Never Rarely Occasionally Frequently

15. What is your assessment of this individual's ability to communicate and see?
Condition has no impact on communication or vision

16. Is your patient making positive progress? Yes No

Please describe the progress or lack of progress.
Current series of medication and physical therapy seem to be working. Will adjust as needed, but is stable for now.

17. Are the patient's impairments likely to produce 'bad' days? Yes No

If yes, on the average, how often do you anticipate that your patient's impairments would become acute so that the patient would be absent from work and/or other W-2 activities?

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

18. Does this person's medication(s) or treatment cause side affects that impact his/her ability to participate in a work/education environment (e.g., drowsiness, dizziness, nausea, etc.)?
 Yes No

If "Yes" specify: Drowsiness, lack of appetite

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

Yes No Unknown

If "Yes" describe what is needed:

Flexible schedule, ability to take more frequent breaks, vary sitting and standing every 1-2 hours, cane may be needed to walk occasionally

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

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

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

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

22. Additional Recommendations or Restrictions: Continued physical therapy, it is important for Kylo to not overdo activity even on good days as this can cause symptoms to worsen

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

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

If no recommendations, please explain:

24. Estimate the number of hours a day (5 days a week) this individual can participate in work/work readiness activities within these recommendations : No restriction as long as accommodations are provided

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

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

Name of Professional Provider	Title	Telephone Number
Dr. Leyton Schwartz	Rheumatologist	920-848-5100
Signature of Professional Provider		Date Signed
<i>Dr. Leyton Schwartz</i>		3/13/2019

Return completed form to:

Name of Agency Representative		Address		Date Sent
Wendy Williamson		2201 Oregon St		3/1/2019
City	State	Zip Code	Telephone Number	Fax Number
Oshkosh	WI	54902	920-255-6645	920-255-6655

O*NET Interest Profiler: Career List at My Next Move

<https://www.mynextmove.org/explore/ip-print?t=o&z=2&i=3...>

O*NET Interest Profiler: Career List

Your interest results:






















Realistic	34
Investigative	12
Artistic	10
Social	15
Enterprising	21
Conventional	5

Your Job Zone:

Job Zone
Two
Some Preparation
Needed

Careers that fit your interests and preparation level:

 Best fit  Great fit

-  Agricultural Equipment Operators
-  Aircraft Structure, Surfaces, Rigging, & Systems Assemblers
-   Ambulance Drivers & Attendants
-  Animal Breeders
-   Animal Trainers
-  Athletes & Sports Competitors
-  Automotive Body & Related Repairers
-  Automotive Glass Installers & Repairers
-  Bus Drivers, Transit & Intercity
-  Cabinetmakers & Bench Carpenters
-  Carpet Installers
-  Cleaning, Washing, & Metal Pickling Equipment Operators & Tenders
-   Construction Laborers
-   Cooks, Restaurant
-   Couriers & Messengers
-  Cutting & Slicing Machine Setters, Operators, & Tenders

O*NET Interest Profiler: Career List at My Next Move

<https://www.mynextmove.org/explore/ip-print?t=o&z=2&i=3...>

-  Dredge Operators
-  Driver/Sales Workers
-  Electrical & Electronic Equipment Assemblers
-  Excavating & Loading Machine & Dragline Operators
-  Extruding & Drawing Machine Setters, Operators, & Tenders, Metal & Plastic
-  Extruding & Forming Machine Setters, Operators, & Tenders, Synthetic & Glass Fibers
-   Floor Sanders & Finishers
-  Food & Tobacco Roasting, Baking, & Drying Machine Operators & Tenders
-  Forest Firefighters
-  Furniture Finishers
-  Gas Compressor & Gas Pumping Station Operators
-   Glaziers
-  Grinding, Lapping, Polishing, & Buffing Machine Tool Setters, Operators, & Tenders, Metal & Plastic
-   Helpers--Brickmasons, Blockmasons, Stonemasons, & Tile & Marble Setters
-   Helpers--Pipelayers, Plumbers, Pipefitters, & Steamfitters
-  Hoist & Winch Operators
-  Insulation Workers, Floor, Ceiling, & Wall
-   Laborers & Freight, Stock, & Material Movers, Hand
-  Machine Feeders & Offbearers
-  Manufactured Building & Mobile Home Installers
-   Mechanical Door Repairers
-  Mine Cutting & Channeling Machine Operators
-  Mine Shuttle Car Operators
-  Molding & Casting Workers
-  Multiple Machine Tool Setters, Operators, & Tenders, Metal & Plastic

O*NET Interest Profiler: Career List at My Next Move

<https://www.mynextmove.org/explore/ip-print?t=o&z=2&i=3...>

-  Nursery Workers
-   Outdoor Power Equipment & Other Small Engine Mechanics
-   Packers & Packagers, Hand
-  Painters, Construction & Maintenance
-   Paving, Surfacing, & Tamping Equipment Operators
-   Pipelayers
-  Rail-Track Laying & Maintenance Equipment Operators
-  Railroad Brake, Signal, & Switch Operators
-  Roof Bolters, Mining
-   Roofers
-   Rotary Drill Operators, Oil & Gas
-   Segmental Pavers
-  Sheet Metal Workers
-  Shoe Machine Operators & Tenders
-  Solderers & Brazers
-  Tapers
-  Taxi Drivers & Chauffeurs
-  Telecommunications Line Installers & Repairers
-   Terrazzo Workers & Finishers
-  Textile Bleaching & Dyeing Machine Operators & Tenders
-  Textile Cutting Machine Setters, Operators, & Tenders
-  Timing Device Assemblers & Adjusters
-  Tool Grinders, Filers, & Sharpeners
-   Tree Trimmers & Pruners
-  Upholsterers

O*NET Interest Profiler: Career List at My Next Move

<https://www.mynextmove.org/explore/ip-print?t=o&z=2&i=3...>

-  Adhesive Bonding Machine Operators & Tenders
-  Aircraft Cargo Handling Supervisors
-  Baggage Porters & Bellhops
-  Bailiffs
-  Bakers
-  Butchers & Meat Cutters
-  Chemical Equipment Operators & Tenders
-  Chemical Plant & System Operators
-  Cleaners of Vehicles & Equipment
-  Continuous Mining Machine Operators
-  Correctional Officers & Jailers
-  Engine & Other Machine Assemblers
-  Etchers & Engravers
-  Furnace, Kiln, Oven, Drier, & Kettle Operators & Tenders
-  Geothermal Technicians
-  Heat Treating Equipment Setters, Operators, & Tenders, Metal & Plastic
-  Helpers--Carpenters
-  Helpers--Electricians
-  Helpers--Roofers
-  Janitors & Cleaners
-  Lifeguards, Ski Patrol, & Other Recreational Protective Service Workers
-  Locksmiths & Safe Repairers
-  Milling & Planing Machine Setters, Operators, & Tenders, Metal & Plastic
-  Millwrights
-  Motorboat Operators

O*NET Interest Profiler: Career List at My Next Move




<https://www.mynextmove.org/explore/ip-print?t=o&z=2&i=3...>

-   Ophthalmic Laboratory Technicians
-  Painting, Coating, & Decorating Workers
-  Pest Control Workers
-  Pesticide Handlers, Sprayers, & Applicators, Vegetation
-  Petroleum Pump System Operators, Refinery Operators, & Gaugers
-  Plating & Coating Machine Setters, Operators, & Tenders, Metal & Plastic
-  Pourers & Casters, Metal
-  Rail Car Repairers
-  Rail Yard Engineers, Dinkey Operators, & Hostlers
-   Refuse & Recyclable Material Collectors
-  Rolling Machine Setters, Operators, & Tenders, Metal & Plastic
-   Security Guards
-   Shampooers
-   Structural Iron & Steel Workers
-   Team Assemblers
-  Textile Winding, Twisting, & Drawing Out Machine Setters, Operators, & Tenders
-  Tire Repairers & Changers
-  Transportation Security Screeners
-   Weatherization Installers & Technicians

Other careers that fit your interests:

Job Zone One: Little or No Preparation Needed

 Best fit  Great fit

-   Cement Masons & Concrete Finishers
-  Conveyor Operators & Tenders











O*NET Interest Profiler: Career List at My Next Move

<https://www.mynextmove.org/explore/ip-print?t=o&z=2&i=3...>

-   Counter Attendants, Cafeteria, Food Concession, & Coffee Shop
-  Fabric Menders
-  Farmworkers & Laborers, Crop
-  Farmworkers, Farm, Ranch, & Aquacultural Animals
-   Fishers & Related Fishing Workers
-  Helpers--Painters, Paperhangers, Plasterers, & Stucco Masons
-   Hunters & Trappers
-  Meat, Poultry, & Fish Cutters & Trimmers
-  Plasterers & Stucco Masons
-   Roustabouts, Oil & Gas
-   Septic Tank Servicers & Sewer Pipe Cleaners
-  Bridge & Lock Tenders
-  Dishwashers
-  Fallers
-  Laundry & Dry-Cleaning Workers

Job Zone Three: Medium Preparation Needed

 **Best fit**  **Great fit**

-  Automotive Master Mechanics
-  Boilermakers
-   Commercial Divers
-  Computer-Controlled Machine Tool Operators, Metal & Plastic
-  Forest & Conservation Technicians
-  Motorcycle Mechanics
-  Municipal Firefighters
-   Pipe Fitters & Steamfitters

O*NET Interest Profiler: Career List at My Next Move

<https://www.mynextmove.org/explore/ip-print?t=o&z=2&i=3...>

-  Radio, Cellular, & Tower Equipment Installers & Repairers
-   Radiologic Technologists
-   Refrigeration Mechanics & Installers
-   Stonemasons
-  Tailors, Dressmakers, & Custom Sewers
-  Traffic Technicians
-  Automotive Engineering Technicians
-  Automotive Specialty Technicians
-   Barbers
-  Bus & Truck Mechanics & Diesel Engine Specialists
-   Chefs & Head Cooks
-  Commercial Pilots
-  Electric Motor, Power Tool, & Related Repairers
-  Electrical & Electronics Repairers, Powerhouse, Substation, & Relay
-  Electricians
-  Electronic Home Entertainment Equipment Installers & Repairers
-  First-Line Supervisors of Agricultural Crop & Horticultural Workers
-  First-Line Supervisors of Animal Husbandry & Animal Care Workers
-  Forest Fire Fighting & Prevention Supervisors
-  Gem & Diamond Workers
-   Hazardous Materials Removal Workers
-  Manufacturing Production Technicians
-   Medical Appliance Technicians
-  Mobile Heavy Equipment Mechanics
-  Model Makers, Metal & Plastic






O*NET Interest Profiler: Career List at My Next Move

<https://www.mynextmove.org/explore/ip-print?t=o&z=2&i=3...>

-  Motorboat Mechanics & Service Technicians
-  Municipal Fire Fighting & Prevention Supervisors
-  Nuclear Power Reactor Operators
-  Pilots, Ship
-  Police Patrol Officers
-  Potters, Manufacturing
-  Precious Metal Workers
-   Radiologic Technicians
-   Security & Fire Alarm Systems Installers
-  Sheriffs & Deputy Sheriffs
-  Ship & Boat Captains
-  Signal & Track Switch Repairers
-   Solar Thermal Installers & Technicians
-  Telecommunications Engineering Specialists
-  Transit & Railroad Police
-  Umpires, Referees, & Other Sports Officials
-   Veterinary Assistants & Laboratory Animal Caretakers
-  Water & Wastewater Treatment Plant & System Operators
-  Welders, Cutters, & Welder Fitters
-   Wind Turbine Service Technicians

Job Zone Four: High Preparation Needed

 **Best fit**  **Great fit**

-   Coaches & Scouts
-  Computer Network Support Specialists
-  Fish & Game Wardens
-  Foresters









O*NET Interest Profiler: Career List at My Next Move

<https://www.mynextmove.org/explore/ip-print?t=o&z=2&i=3...>

-  Museum Technicians & Conservators
-  Soil & Water Conservationists
-  Wind Energy Engineers
- Automotive Engineers
- Farm & Ranch Managers
- Sales Engineers

Job Zone Five: Extensive Preparation Needed

 Best fit  Great fit

-  Environmental Restoration Planners
-  Acupuncturists
-  Anesthesiologist Assistants
-  Athletic Trainers
-  Chiropractors
- Farm & Home Management Advisors
- Fuel Cell Engineers
-  Human Factors Engineers & Ergonomists
-  Oral & Maxillofacial Surgeons
-  Surgeons

Special Notice: Proper Use of O*NET Interest Profiler Results

Your **should use** your **O*NET Interest Profiler** results to explore the world of work and identify careers that may satisfy what is important to you in a job-your interests. You will be able to look at the interests satisfied by careers and compare them to your own interests. Talk to a vocational/employment counselor or teacher for more help on how to use your **O*NET Interest Profiler** results.

Your **O*NET Interest Profiler** results **should not be used** for employment or hiring decisions. Employers, education programs, or other job-related programs should not use your results as part of a screening process for jobs or training.

If you think that your **O*NET Interest Profiler** results are being used incorrectly, talk to your vocational/employment counselor, teacher, or program administrator. You also can contact the National Center for O*NET Development for assistance.

O*NET Interest Profiler: Career List at My Next Move

<https://www.mynextmove.org/explore/ip-print?t=o&z=2&i=3...>

National Center for O*NET Development
Attention: Customer Service
P.O. Box 27625
Raleigh, NC 27611
Email: [O*NET Customer Service \(onet@onetcenter.org\)](mailto:onet@onetcenter.org)

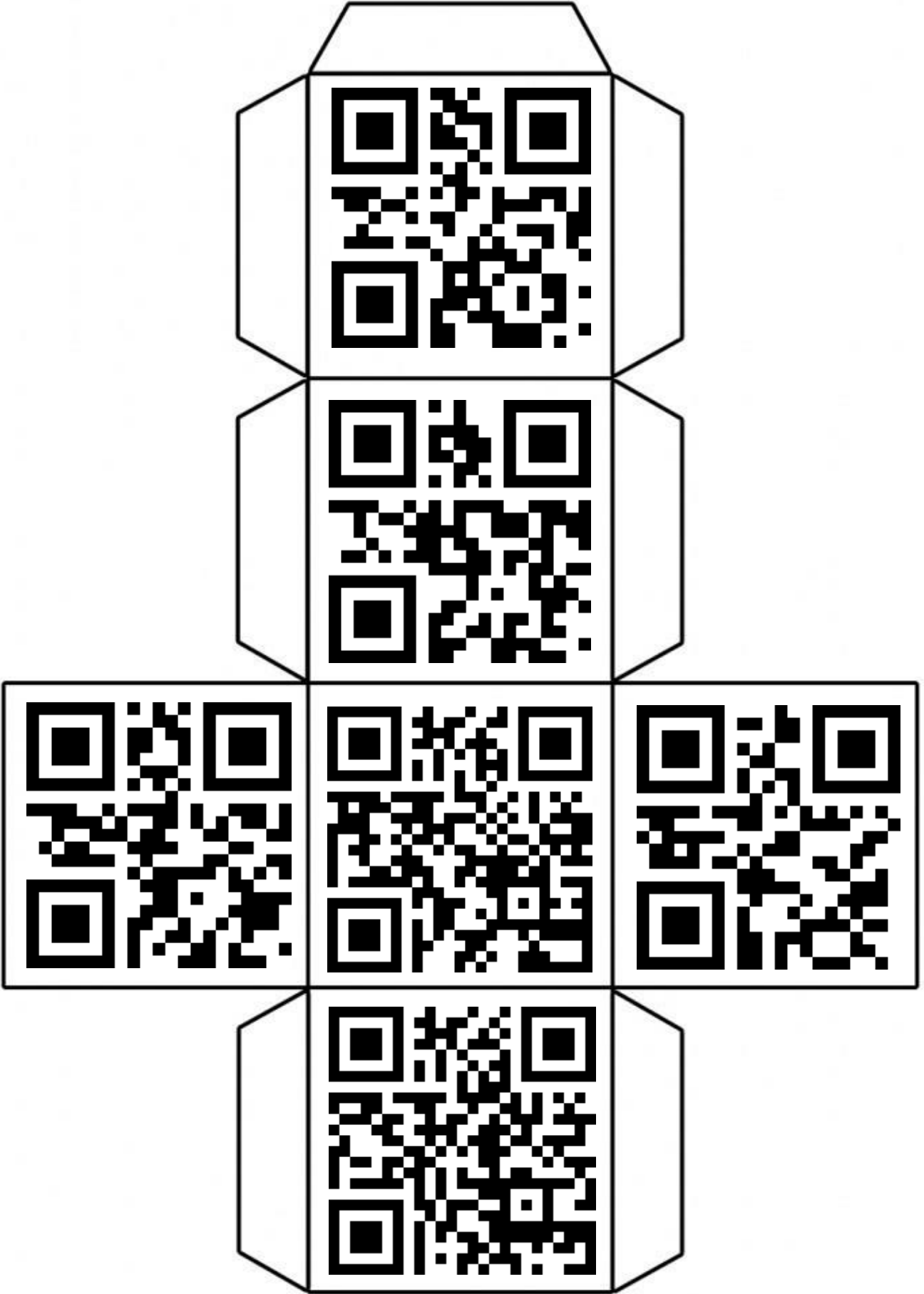
Appendix C: Accommodations Activity

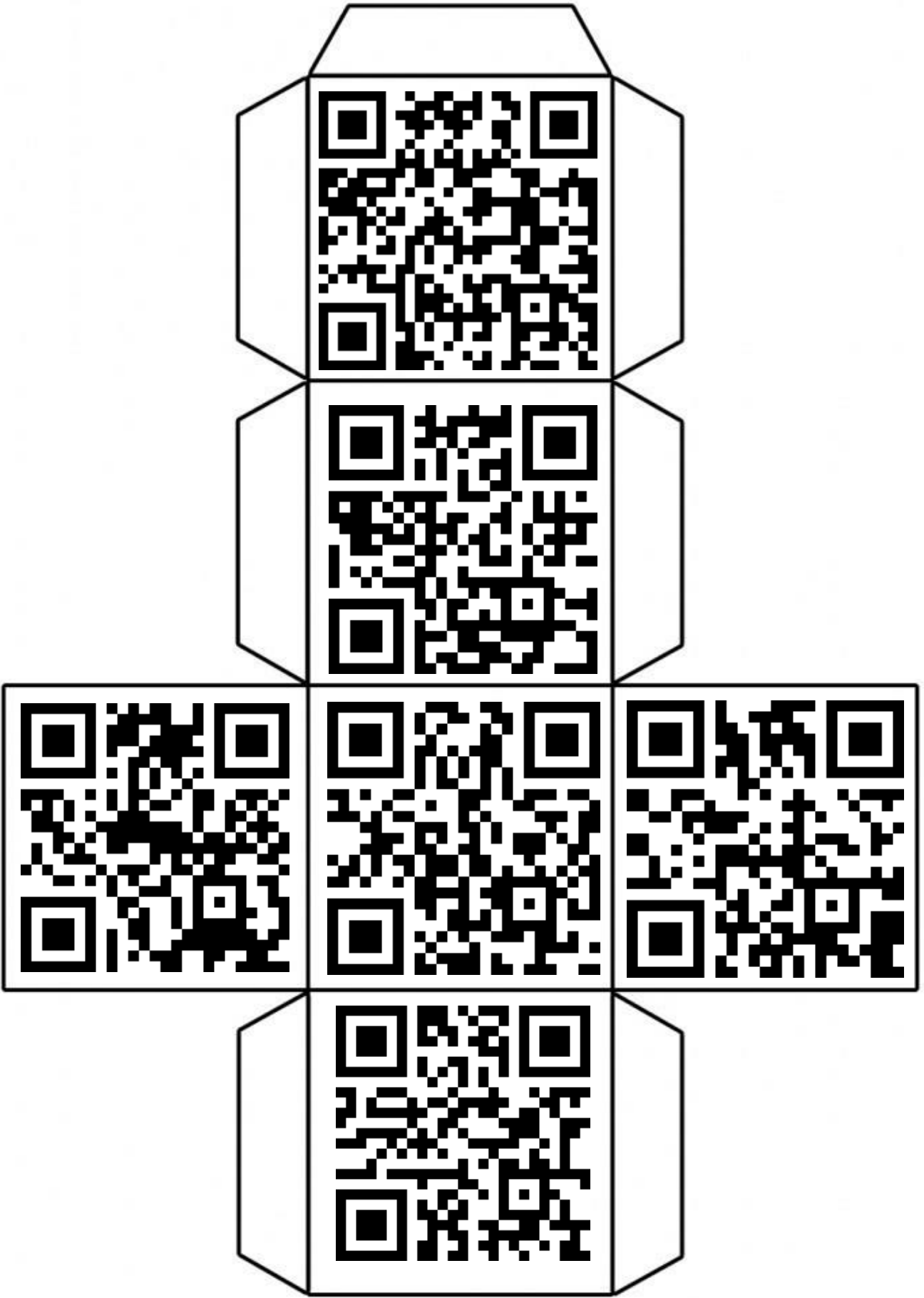
To see more, go to <https://askjan.org>.

Functioning Deficits	<ul style="list-style-type: none"> • Checklists • Extra Time • Job Coach • On-site Mentoring 	<ul style="list-style-type: none"> • Reminders • Written Instructions • Noise Canceling Devices • Modified Break Schedule
Physical Mobility	<ul style="list-style-type: none"> • Adjustable Workstation • Automatic Door Openers • Door Knob Grips and Handles • Monitor Riser 	<ul style="list-style-type: none"> • Lifts • Headsets • Auto-Dialers • Writing Aids
Memory Deficits	<ul style="list-style-type: none"> • Allow Use of Memory Apps • Electronic Organizer • Memory Software Installed on Computer • Recorded Messages 	<ul style="list-style-type: none"> • Reminders • Verbal Cues • Written Instructions • Wall Calendars and Planners
Stress Management	<ul style="list-style-type: none"> • Modified Break Schedule • Change in Supervisory Method • On-site Mentoring • Uninterrupted Work Time 	<ul style="list-style-type: none"> • Flexible Schedule • Sound Machine • Job Restructuring • Work from Home
Fatigue/Weakness	<ul style="list-style-type: none"> • Anti-Fatigue Matting • Ergonomic Equipment • Stand-lean Stools • Aide/Assistant 	<ul style="list-style-type: none"> • Periodic Rest Breaks • Scooters • Modified Workspace • Walkers
Concentration Deficits	<ul style="list-style-type: none"> • Alternative Lighting • Cubicle Doors, Shields, and Shades • Environmental Sound Machines 	<ul style="list-style-type: none"> • Task Separation • On-site Job Coach • Noise Canceling Headset • Modified Work Space

If learners can't use the QR code dice or there is no access to a QR code reader, the following is a list of what the limitations and accommodations that should be used for the Accommodation Activity. Adapt using the table below as you see fit.

Accommodations	Limitations
Work Experience Site	Function Deficits
Job Search	Physical Mobility
Workshop	Stress Management
Participation	Memory Deficits
Environment	Fatigue/Weakness
"Out of the Box"	Concentration Deficits





Appendix D: Video Scripts

Video 1: Participant and Case Manager

Case Manager (CM): Rhonda, you're 10 minutes late for your appointment. I'll still meet with you today, but we need to work on you arriving to your appointments on time.

Rhonda (R): Yeah, sorry about that. I was just meeting with Lacey, my DVR Business Services Consultant, and it ran a little longer than I thought it would.

CM: Ok, well we have a lot to cover in a shorter period of time now. The first thing I want us to talk about is your Work Experience. I didn't get any logs from you for last week, so I called your Site Supervisor this morning. He tells me you haven't been there for almost two weeks. Can you tell me more about that?

R: I started my paid work experience through DVR last Wednesday, and I'm scheduled to be in two places at once. Since I get a check from the paid work experience, I thought that was more important.

CM: That's right! I forgot you were starting that! But did you forget about your W-2 payment? It'll have to be sanctioned due to missing so many hours.

R: I kind of figured that. I did the math, and even with the sanction I should still have enough left to cover the bills plus some.

CM: You should've reminded me. What days and times are you scheduled to be working at your paid site? I'm sure your W-2 Site Supervisor won't mind if we adjust your schedule with them so you can do both.

R: Here it is. But can't it count...

CM: Great! We can use that to update your Employability Plan in a bit. Now, on to our second topic on hand, job search. How's that going for you?

R: Fine, I guess. I really like this paid work experience at the Aging and Disability Office. Everyone is really nice. I wish there was an open position there. My boss said that she started as a volunteer there, too, and worked her way up.

CM: Do they have any current job openings?

R: No, not right now, but they might in the future.

CM: We need to focus your job search on open positions you can be hired for right now. Your son turns 18 and graduates at the end of May. We need to find you a steady source of income before you become ineligible for W-2 services. I see you applied at Hometown Bank last week. Have you heard back from them?

R: Yeah, I had a phone interview on Monday. They want me to come in for an in-person interview sometime next week.

CM: That's great news! Why didn't you tell me about that first? Do you feel prepared for the interview?

R: I think so. I just don't know if I'm going to be able to do the job. It requires a lot of standing, and you know that's an issue for me. I'm also nervous about having to enter accurate numbers into their computer system. I think the position at Aging and Disability suits me better.

CM: I'm sure you'll do fine! You're probably just nervous because you haven't worked in a while. Besides, ADRC isn't hiring right now, remember? What do you plan on wearing for your interview next week?

R: I have one pair of dress pants and a few blouses to choose from. I'm not sure what I'll do if I get hired, though. I have a friend who used to work in a bank, and she said you have to dress up every workday.

CM: We may be able to help out with an outfit or two if you get hired. Let's not worry about that yet; you need to ace the interview first.

R: I'll try.

CM: Good! Now the last thing we need to discuss before we move on to updating your Employability Plan is career assessments. I was looking over your case and realized you've been applying for all types of positions in a variety of fields. We can use a career assessment to narrow down the types of positions that would suit you best.

R: Oh, I think I just did some of those with Lacey.

CM: You might have. Was it on a website called Career Locker?

R: No, it was something else, but I'm pretty sure we did some.

CM: We like to use Career Locker here, so we'll have you take our version even if you did some with Lacey. You never know, you might get different results. I can get your account created right now. Remind me, what's your email address?

R: Which one, the one I created with you or the one I created with Lacey?

CM: Which one do you use more often?

R: It depends. I use the one I created with Lacey when we work on applications together. I use the one I created with you when I'm doing job searches for my W-2 activities.

CM: We'll just use the one you created with me.

R: Ok. It is rhondar@mail.com.

CM: Thanks. Now your account is set up and ready to go. I'll print out your login information and the website address for you. I want you to take the Personal Globe Inventory, Work Skills, and Work Values assessments. You can find them under the assessment tab.

R: Those all sound really familiar.

CM: Maybe, but we're going to have you do them just in case. Don't change your password because I want to go in and take a look at your results before your next appointment. I'll print them out for you, and we can talk more about them then.

R: When is our next appointment going to be?

CM: We aren't quite to that point yet. First, we need to update your Employability Plan. However, I would like to meet soon since we need to go over the results and you have that interview next week.

R: I don't know if I'll be able to do all of those career assessments within the next couple of weeks. I've been really busy between my activities with you and DVR.

CM: Don't worry, we'll count the career assessments as part of your activities.

R: Will my work experience or job search hours go down?

CM: No, but we'll adjust the schedule. The total hours for each activity will remain the same.

R: I still just don't know how I'm going to get it all in.

CM: We can fill out a schedule together; would that help?

R: No, I think I'm good at scheduling. It's just overwhelming.

CM: I understand. I have a lot on my plate too. You can always give me a call or send me an email if things get too out of hand and we can look at adjusting if we need to. Even though it seems impossible now, you *have* done what you thought was impossible in the past. Remember when you came into W-2 thinking you would never be able to work again?

R: I guess you're right.

CM: So, that's all I have on my list to cover today. I know you wanted help adding your work experience to your resume, but we won't have time because you were late. Anyway, you have an interview, so you may not even need it. We just need to update your EP and then you're good to go.

R: Can we work on it next time at least? I'd like an updated resume even if I do get the job just in case I need it in the future.

CM: We have to go over your career assessments, but that shouldn't take too long, so we should be able to squeeze in the resume.

R: OK.

CM: Here's a copy of your updated EP. For your appointment, I would like to meet next Friday at 3pm. Does that work for you?

R: I meet with Lacey at 9am that day. Would it be possible to meet before or right after, so I don't have to come into town twice?

CM: The only other time I have available is when you're meeting with Lacey at 9am.

R: I guess that 3pm will have to work then.

CM: Great! I'll get you scheduled for Friday at 3. Good luck at your interview and I'll see you next week.

Video 2: Rhonda, Lacey, and Case Manager

Case Manager (CM): Hi Lacey. Before Rhonda gets here, I wanted to discuss the things we want to cover today. Do you have any topics you plan on talking to her about?

Lacey (L): I want to check in and see how her paid work experience is going since she has been there almost two weeks. Her Site Supervisor says she's doing a really good job.

CM: That was on my list to talk to her about as well. Have you and Rhonda completed career assessments together? She's been applying for positions in various fields, and I think the assessments may benefit her.

L: Yes, we did career assessments last week. I have the results right here; you can have a copy. We didn't get an opportunity to discuss them due to her starting her work experience, so we can talk about them today.

CM: Great! The only other thing I need to do today with Rhonda is update her Employability Plan. Do you have a copy of her DVR plan so I can take a look at it before she gets here?

L: Absolutely; here you go.

(Rhonda enters)

CM: Hi Rhonda. Lacey and I were just getting ready to meet with you. She tells me you started your paid work experience. Can you tell me how that's going?

Rhonda (R): I think it's going really well. I love it! Everyone at the Aging and Disability Office is really nice and I feel like I'm catching on fast.

L: I spoke with your Site Supervisor, Megan, this morning and she agrees. She said that you've started working on the weekly newsletter.

R: Yes, I am much more familiar with the computer than most of the other ladies who work there. They said they would let me do a portion of the newsletter this week, and if I do well, I can do the entire newsletter next week.

CM: That's exciting! What else do you like about your position with ADRC?

R: Everything! I don't think there is anything I don't like, other than the fact that it ends in 6 weeks. I was talking to Megan, and she said she started as a volunteer there, too. She says they liked her so much, they hired her.

CM: Lacey, do you know if there will be an open position with ADRC in the near future?

L: Not that I'm aware of. I can follow up with Megan, though, to be sure. I do know a different office is going to have an administrative position opening soon. Rhonda, would you like me to see if Megan thinks you would be a good fit for the position and would be willing to put in a good word for you?

R: Sure! It doesn't hurt to try. I did get a call back for an in-person interview for Hometown Bank next week, but I'm not sure how I feel about it.

CM: What aren't you sure about?

R: The job description says it is a lot of data entry, and I'm worried about getting everything entered correctly into their computer system. It also requires a lot of standing in the same position. I need to be able to sit, stand, and move around every few hours.

L: We could look into some accommodations to help with those things.

R: Really, what type of accommodations?

L: That depends on your needs. Some examples include a desk that can adjust to sitting and standing, along with pedals underneath the desk for when you need to move your legs a bit.

R: Cool, I never thought about that.

CM: What makes you unsure about the computer entries?

R: I've never done it before, so I'm not sure I can do it.

CM: Remember when you didn't think you would be able to make any documents in Microsoft Word? Now you're already working on newsletters at your new Work Experience!

R: You're right, I just needed a little practice with Word. If I can get an accommodation, and be able to practice entering information, I think the position may work for me.

CM: Good! It sounds like you're enjoying the position with ADRC and are interested in working for the bank. However, you've also been applying for cooking and cleaning positions. Can you tell me more about that?

R: I am applying for everything that is open because they all sound ok. I just need a job as soon as possible.

L: We want to make sure that when you get a position, it's going to be something you enjoy. Last time we met, we did career assessments. Let's go over those results together. From your Personal Globe Inventory, you tested high in Social and

Conventional. This means you like working with people and data. It also means you are dependable, organized, friendly, and supportive. What do you think about those results?

R: I think that definitely sounds like me! I love when I get to sit up front at Aging and Disability. It gives me the opportunity to work on my projects, like the newsletter, but also interact with people when they come in.

L: How do you think the position with Hometown Bank would fit these interests?

R: After hearing the results, I think it would actually match up pretty well.

CM: What about cleaning or cooking? Do you feel those would match up?

R: I would be able to get my projects done, but I wouldn't be able to interact with people a lot. Maybe I wouldn't like those positions as much.

CM: I think you're right. How would you feel about applying for positions where you can both interact with the public, but also get projects done and information entered?

R: I think that's a much better idea. Now that I think about it, I did work as a cook once at McDonald's and hated it. Speaking of past jobs, I'd really like to update my resume with my new Work Experience. Would either of you be able to help with that?

CM: That's something we could both help you with. I know you work at ADRC during Job Club, so I could schedule an individual time with you. I'd be able to work with you on your resume next Monday.

R: I was hoping to work on it a little sooner than that, I want to bring it with me to my interview.

L: I can meet with you on Friday; would that work? We can also go over some tough interview questions to help you prepare.

R: That would be fantastic.

CM: Can you send your resume to me after meeting with Lacey on Friday, so I have a copy as well?

R: Absolutely!

CM: Thank you! Lacey shared your DVR plan with me, and it looks like you're doing many of the same activities that you're doing for W-2. How would you feel about having those DVR activities be your W-2 activities as well?

R: That would work much better. It's been a little overwhelming trying to get everything in.

CM: OK, then we'll get your EP updated to include your paid work experience at Aging and Disability and your weekly meetings with Lacey. Here is your copy. Lacey, was there anything else you'd like to cover today?

L: No. Rhonda, I have you in my schedule to meet on Friday here at the Job Center. For our next ongoing meeting, would you like to meet with both of us again?

R: Yes, if possible.

CM: We can certainly do that. Let's get your next appointment scheduled.

Appendix E: Serina Franklin Scenario

Serina is a 22-year-old parent of three children, ages five, four, and two. She lives with her boyfriend, but he is not the father of any of her children. She does not have custody of her five-year-old son.

Serina speaks English and does not know any other languages. She worked as a bartender for several years which she liked. Serina found it exciting to meet new people, and felt it was more like hanging out with friends than work. She volunteered at the local animal shelter prior to her youngest child being born. Serina participated in Upward Bound in high school, a program that helps participants gain college entrance. When she found out she was pregnant with her oldest son, she decided to get a job to support her family instead of going to college. Serina got her GED from Fox Valley Technical College five years ago. She does not have any post-secondary education or military experience. Serina has lived with her boyfriend, Martin, for seven months in a local low-income housing apartment complex. She pays the rent, and Martin pays the utilities. Prior to that, she lived with her ex-boyfriend for two years.

Serina has her own vehicle but is behind on car payments. She spoke with her bank, and they are willing to work with her. The bank lowered her monthly payments but stated that if she is late one more time, they will start the repossession process. Serina's vehicle registration and insurance are current. She received a misdemeanor possession conviction six months ago. Serina is on probation for that charge and meets with her PO every other week. She has a custody hearing for her oldest child scheduled in six weeks. Serina participates in a court ordered AODA program. She meets with a counselor weekly and a technician daily for her Suboxone treatment. She started using drugs to cope with reoccurring back pain, which she sustained in a horse-riding accident in her early teens. Her back issues also cause her legs to go numb when she stands for long periods of time, which is preventing her from working as a bartender.

Serina's oldest son was removed from the home due to him being present when she was arrested for possession. He has a child welfare worker who meets with Serina weekly for parenting classes. This is part of the agreement for her to get custody back. Until then, he lives with Serina's mother. Serina believes her mother doesn't want her to gain custody back, which causes tension and lack of communication between the two. Because she is cooperating with the child welfare worker, she does get supervised visitation three nights a week. There is no formal child care plan in place for Serina's other children. Martin is willing to watch the children when she has appointments, but there is no back-up plan. Serina does not have contact with any of her children's fathers. Child support is ordered, but she hasn't received any payments.

Decision 1

You have just completed your initial informal assessment with Serina and determined she is appropriate for the W-2 T placement.

Based on the information provided, what is the first step you want to take?

Decision 2

You have received one formal assessment back for Serina.

What is your next step?

Decision 3

You decide it is time to start collaborating with another community program that Serina is already working with.

Which program do you want to collaborate with?

Decision 4

You have started collaborating with one program Serina is participating in.

What is your next step?

Decision 5

You decide Serina would benefit from an additional assessment.

What assessment would you like to see Serina do?

Decision 6

Serina has completed one additional assessment. Per W-2 Policy, career assessments are required. If you did not already complete a career assessment in Decision 5, you **must** decide to complete another assessment.

What is the next step you would like to take?

Decision 7

You decide to refer Serina to another program that will help her get to her goals.

Which program would you like to refer her to?

Decision 8

You provided Serina with one referral to another program.

What step would you like to take next?

Decision 9

You decide to start incorporating everything that you and Serina have learned into her Employability Plan.

Based on what you and Serina have discovered, what activities will you assign on her Employability Plan? What accommodations are you going to provide?

Decision 1

AODA Assessment – Serina signs the Wisconsin Works (W-2) Formal Assessment Agreement form and signs a Release of Information for you to communicate with her counselor, Pia Daughtrey. You provide Serina with a Mental Health Report; she turns in her completed form to you. Go see the trainer for a copy of Serina's Mental Health Report and review it as a group. Then move on to decision two.

AODA Assessment – Serina signs the Wisconsin Works (W-2) Formal Assessment Agreement form and signs a Release of Information for you to communicate with her counselor, Pia Daughtrey. You provide Serina with a Mental Health Report; she turns in her completed form to you. Go see the trainer for a copy of Serina's Mental Health Report and review it as a group. Then move on to decision two.

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Medical Assessment – Serina signs the Wisconsin Works (W-2) Formal Assessment Agreement form and signs a Release of Information for you to communicate with her doctor, Fraiser Hills. You provide Serina with a Medical Examination and Capacity form, and she turns in her completed form to you. Go see the trainer for a copy of Serina's Medical Assessment and review it as a group. Then move on to decision two.

Medical Assessment – Serina signs the Wisconsin Works (W-2) Formal Assessment Agreement form and signs a Release of Information for you to communicate with her doctor, Fraiser Hills. You provide Serina with a Medical Examination and Capacity form, and she turns in her completed form to you. Go see the trainer for a copy of Serina's Medical Assessment and review it as a group. Then move on to decision two.

Medical Assessment – Serina signs the Wisconsin Works (W-2) Formal Assessment Agreement form and signs a Release of Information for you to communicate with her doctor, Fraiser Hills. You provide Serina with a Medical Examination and Capacity form, and she turns in her completed form to you. Go see the trainer for a copy of Serina's Medical Assessment and review it as a group. Then move on to decision two.

Decision 2

Get Another Formal Assessment – Serina signs another Wisconsin Works (W-2) Formal Assessment Agreement form and Release of Information for the additional assessment and provider. You provide Serina with either the Mental Health Report or Med Cap form, and she turns in the completed form to you. Go see the trainer for a copy of Serina's other formal assessment and review it as a group. Then move on to decision three.

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Start Collaborating with Community Partners – You feel you have enough formal assessment information to start collaborating with the community partners Serina is already working with. Move on to decision three.

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Decision 3

Probation and Parole – Serina agrees that collaborating with her Probation Officer (PO) is a good idea and signs a Release of Information for you to communicate with her PO. You reach out to her PO and find out that she needs to complete 40 community service hours every month. On top of her community service hours, Serina must keep up with her weekly counseling appointments and daily Suboxone appointments and maintain absolute sobriety. If she does not, it is a violation of her probation, and she will have to go to jail. Because Serina has been meeting all terms of her probation, she meets with her PO only every other week. Move on to decision four.

Probation and Parole – Serina agrees that collaborating with her Probation Officer (PO) is a good idea and signs a Release of Information for you to communicate with her PO. You reach out to her PO and find out that she needs to complete 40 community service hours every month. On top of her community service hours, Serina must keep up with her weekly counseling appointments and daily Suboxone appointments and maintain absolute sobriety. If she does not, it is a violation of her probation and she will have to go to jail. Because Serina has been meeting all terms of her probation, she meets with her PO only every other week. Move on to decision four.

Child Welfare – Serina agrees that collaborating with her Child Welfare worker is a good idea and signs a Release of Information for you to communicate with the Child Welfare worker. You reach out to her Child Welfare worker and confirm that she meets with Serina every Tuesday at 4pm for in-home parenting classes. She states that if Serina continues to do well over the next six weeks, there is a good chance she will gain custody back at her upcoming hearing, but the in-home parenting classes and check-in meetings will continue for at least three months after that. Move on to decision four.

Child Welfare – Serina agrees that collaborating with her Child Welfare worker is a good idea and signs a Release of Information for you to communicate with the Child Welfare worker. You reach out to her Child Welfare worker and confirm that she meets with Serina every Tuesday at 4pm for in-home parenting classes. She states that if Serina continues to do well over the next six weeks, there is a good chance she will gain custody back at her upcoming hearing, but the in-home parenting classes and check-in meetings will continue for at least three months after that. Move on to decision four.

Decision 4

Collaborate with Another Program – Go back to decision three and gather the information from the option you did not originally select. Review that information with your group and then move on to decision five.

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Collaborate with Another Program – Go back to decision three and gather the information from the option you did not originally select. Review that information with your group and then move on to decision five.

Get Additional Assessments – You decide that you have enough information about her involvement in the community and think Serina would benefit from some additional assessments. Move on to decision five.

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Decision 5

Career Assessment – You and Serina decide that she would benefit from a career assessment. She completes the O*NET Interest Profiler and brings in her results to you. You review the assessment results with her. Go see the trainer for a copy of Serina's Career Assessment and review it as a group. Then move on to decision six.

Career Assessment – You and Serina decide that she would benefit from a career assessment. She completes the O*NET Interest Profiler and brings in her results to you. You review the assessment results with her. Go see the trainer for a copy of Serina's Career Assessment and review it as a group. Then move on to decision six.

Career Assessment – You and Serina decide that she would benefit from a career assessment. She completes the O*NET Interest Profiler and brings in her results to you. You review the assessment results with her. Go see the trainer for a copy of Serina's Career Assessment and review it as a group. Then move on to decision six.

Vocational Assessment – You and Serina decide that she would benefit from a vocational assessment. Serina signs a Release of Information for the vocational assessment provider, you get the assessment scheduled, and the evaluator sends you the results. You go over the results of the vocational assessment with Serina. Go see the trainer for a copy of Serina's Vocational assessment and review it as a group. Then move on to decision six.

Vocational Assessment – You and Serina decide that she would benefit from a vocational assessment. Serina signs a Release of Information for the vocational assessment provider, you get the assessment scheduled, and the evaluator sends you the results. You go over the results of the vocational assessment with Serina. Go see the trainer for a copy of Serina's Vocational assessment and review it as a group. Then move on to decision six.

Vocational Assessment – You and Serina decide that she would benefit from a vocational assessment. Serina signs a Release of Information for the vocational assessment provider, you get the assessment scheduled, and the evaluator sends you the results. You go over the results of the vocational assessment with Serina. Go see the trainer for a copy of Serina's Vocational assessment and review it as a group. Then move on to decision six.

Decision 6

Complete Another Assessment – You and Serina decide she would benefit from another assessment. You go over the results of that assessment with Serina. Go see the trainer for a copy of Serina's other assessment and review it as a group. Then move on to decision seven.

Complete Another Assessment – You and Serina decide she would benefit from another assessment. You go over the results of that assessment with Serina. Go see the trainer for a copy of Serina's other assessment and review it as a group. Then move on to decision seven.

Complete Another Assessment – You and Serina decide she would benefit from another assessment. You go over the results of that assessment with Serina. Go see the trainer for a copy of Serina's other assessment and review it as a group. Then move on to decision seven.

Complete Another Assessment – You and Serina decide she would benefit from another assessment. You go over the results of that assessment with Serina. Go see the trainer for a copy of Serina's other assessment and review it as a group. Then move on to decision seven.

Make a Referral – You believe you have enough assessment information for now, but think Serina would benefit from another community program. Move on to decision seven.

Make a Referral – You believe you have enough assessment information for now but think Serina would benefit from another community program. Move on to decision seven.

Make a Referral – You believe you have enough assessment information for now but think Serina would benefit from another community program. Move on to decision seven.

Make a Referral – You believe you have enough assessment information for now but think Serina would benefit from another community program. Move on to decision seven.

Decision 7

DVR – You inform Serina about DVR and she is interested in applying. You explain the application process to her, inform her of how long it usually takes to get into the program, and who her case manager is likely to be. You help her complete the online referral. Move on to decision eight.

DVR – You inform Serina about DVR and she is interested in applying. You explain the application process to her, inform her of how long it usually takes to get into the program, and who her case manager is likely to be. You help her complete the online referral. Move on to decision eight.

DVR – You inform Serina about DVR and she is interested in applying. You explain the application process to her, inform her of how long it usually takes to get into the program, and who her case manager is likely to be. You help her complete the online referral. Move on to decision eight.

WIOA – You inform Serina about WIOA and she is interested in applying to get some assistance pursuing training at the local tech school. You explain the application process to her, inform her of how long it usually takes to get into the program, and who her case manager is likely to be. You help her complete and turn in the WIOA application. Move on to decision eight.

WIOA – You inform Serina about WIOA and she is interested in applying to get some assistance pursuing training at the local tech school. You explain the application process to her, inform her of how long it usually takes to get into the program, and who her case manager is likely to be. You help her complete and turn in the WIOA application. Move on to decision eight.

WIOA – You inform Serina about WIOA and she is interested in applying to get some assistance pursuing training at the local tech school. You explain the application process to her, inform her of how long it usually takes to get into the program, and who her case manager is likely to be. You help her complete and turn in the WIOA application. Move on to decision eight.

Decision 8

Provide Another Referral – Go back to decision seven and gather the information from the option you did not originally select. Review that information with your group and then move on to decision nine.

Provide Another Referral – Go back to decision seven and gather the information from the option you did not originally select. Review that information with your group and then move on to decision nine.

Provide Another Referral – Go back to decision seven and gather the information from the option you did not originally select. Review that information with your group and then move on to decision nine.

Provide Another Referral – Go back to decision seven and gather the information from the option you did not originally select. Review that information with your group and then move on to decision nine.

Incorporate Results – You feel you have enough information for the time being, and it is time to start incorporating the results of all these assessments and collaborations. Move on to decision nine.

Incorporate Results – You feel you have enough information for the time being, and it is time to start incorporating the results of all these assessments and collaborations. Move on to decision nine.

Incorporate Results – You feel you have enough information for the time being, and it is time to start incorporating the results of all these assessments and collaborations. Move on to decision nine.

Incorporate Results – You feel you have enough information for the time being, and it is time to start incorporating the results of all these assessments and collaborations. Move on to decision nine.

Decision 9

Serina's Activities:

- 1.
- 2.
- 3.
- 4.
- 5.
- 6.

Serina's Accommodations:

-
-
-
-
-
-

DEPARTMENT OF CHILDREN AND FAMILIES
Division of Family and Economic Security

WPM

MENTAL HEALTH REPORT

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

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

Participant Name	Date of Birth	Social Security Number
Serina Franklin	08/05/1996	685-160-1168

Name of Professional Provider		Professional Title	
Pia Daughetry		LPC	
Office Address	City	State	Zip Code
3240 Jackson St	Oshkosh	WI	54901

Dear Mental Health Professional,

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

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

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

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

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

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

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

When is your next scheduled appointment with this patient? Every Monday morning at 10am

2. Are you aware of any other health care professionals who are currently treating this person? If yes, please identify provider name and purpose of treatment: Dr. Eugene Barr, Psychiatrist - Suboxone Treatment

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

Axis I: 304, 305.5 Axis IV: _____

Axis II: _____ Axis V: Current GAF: 64

Axis III: Reoccurring back pain Highest GAF Past Year: _____

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

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

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

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

- rarely occasionally frequently constantly

Is your patient making positive progress? Yes No

Please describe the progress or lack of progress.

Has been attending all weekly appointments and going to her daily treatment.

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

If yes, please list:

Daily suboxone

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

Headaches, dizziness, sleep problems, trouble concentrating

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

Four years ago

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

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

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

If so, please explain:

11. When completing the chart below:

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

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

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

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

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

13. On the average, how often do you anticipate that your patient’s impairments would become acute so that the patient would be absent from work and other W-2 activities?

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

14. Has there been any recent acute episodes? If yes, please explain and give dates:
N/A

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

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

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

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

16. Is the patient attending scheduled appointments? Yes No

If no, please explain and list missed appointment dates:

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

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

Weekly counseling and daily Suboxone treatment
Counseling likely to continue over a year, but frequency will decrease over time, Suboxone
will continue with decreasing dosage as able

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

Counseling - Mondays at 10am, Suboxone - Daily at 9am

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

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

19. What type of environment or conditions could help this person function most effectively in a variety of daily activities? Simple, slow paced environments interacting with others, ability to take breaks for concentration issues, instructions provided in a variety of methods (verbal, written, etc.)

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

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

If no recommendations, please explain:

21. Estimate the hours a day (5 days a week) this individual can participate in work/work readiness activities within these recommendations? Five to six hours a day (25-30 hours a week)

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

Name of Professional Provider	Title	Telephone Number
<u>Pia Daughetry</u>	<u>LPC</u>	<u>920-854-1005</u>
Signature of Professional Provider		Date Signed
<u>Pia Daughetry</u>		<u>9/14/2019</u>

Return completed form to:

Name of Agency Representative		Address		Date Sent
<u>Molly Manager</u>		<u>219 Washington Ave</u>		<u>8/31/2019</u>
City	State	Zip Code	Telephone Number	Fax Number
<u>Oshkosh</u>	<u>WI</u>	<u>54901</u>	<u>920-114-0057</u>	<u>920-049-6600</u>

DEPARTMENT OF CHILDREN AND FAMILIES
Division of Family and Economic Security

WME

MEDICAL EXAMINATION AND CAPACITY

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

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

Participant Name	Date of Birth	Social Security Number
Serina Franklin	08/05/1996	685-160-1168

Name of Professional Provider		Professional Title	
Dr. Fraiser Hills		MD	
Office Address	City	State	Zip Code
1400 Jackson Street	Oshkosh	WI	54901

Dear Health Professional,

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

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

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

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

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

1. How frequently is the patient scheduled to meet with you?
Once a month

Regarding current course of treatment, how long have you been meeting with this patient?
Just began seeing patient last month

When is your next scheduled appointment with this patient?
In three weeks

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

3. Diagnosis/Condition: Lumbar Disk Disease (Herniated Disk)

4. Prognosis: (if the patient's condition is related to pregnancy, please enter the expected date of birth)
Symptoms are likely to improve but there will be chronic pain due to it not being treated sooner.

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

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

Ten years ago

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

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

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

Patient begins physical therapy this month. If there is no significant improvement within five months, surgery will have to be scheduled. If surgery is successful, patient will be left with minimal chronic pain.

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

Physical therapy scheduled every Monday, Wednesday, and Friday at 1pm for the next five months.

7. What type of environment or conditions could help this person function most effectively in a variety of daily activities? Flexible scheduling dependent on patient pain levels, ability to move as needed

8. This individual may have his/her vocational capacity assessed. What, if any, accommodations should be provided for the assessment? Flexible scheduling dependent on patient pain levels

9. Is the patient attending scheduled appointments? Yes No

If no, please explain and list missed appointment dates:

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

Yes No

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

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

11. Physical Capacities

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

No limitation 100 lbs. 50 lbs. 20 lbs. 10 lbs. Other _____

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

No limitation 100 lbs. 50 lbs. 20 lbs. 10 lbs. Other Not recommended

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

No limitation no more than 6 hours no more than 2 hours Other _____

How many city blocks can this individual walk without rest or severe pain? Two blocks

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

No limitation no more than 6 hours no more than 2 hours Other _____

For questions 12-14 below, "rarely" means 1%-5% of an eight-hour workday; "occasionally" means 6%-33% of an eight-hour workday; and "frequently" means 34%-66% of an eight-hour workday.

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

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

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

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

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

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

Never Rarely Occasionally Frequently

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

No impact

16. Is your patient making positive progress? Yes No

Please describe the progress or lack of progress.

Unknown at this time as just began seeing patient

17. Are the patient's impairments likely to produce 'bad' days? Yes No

If yes, on the average, how often do you anticipate that your patient's impairments would become acute so that the patient would be absent from work and/or other W-2 activities?

Once per month or less Over twice per month
 About twice per month More than 3 times per month

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

Yes No

If "Yes" specify: _____

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

Yes No Unknown

If "Yes" describe what is needed:

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

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

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

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

22. Additional Recommendations or Restrictions: _____

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

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

If no recommendations, please explain:

24. Estimate the number of hours a day (5 days a week) this individual can participate in work/work readiness activities within these recommendations : No more than 30 hours a week

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

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

Name of Professional Provider	Title	Telephone Number
Dr. Fraiser Hills	MD	920-008-6216
Signature of Professional Provider		Date Signed
<i>Fraiser Hills, MD</i>		9/14/2019

Return completed form to:

Name of Agency Representative		Address		Date Sent
Molly Manager		219 Washington Ave		8/31/19
City	State	Zip Code	Telephone Number	Fax Number
Oshkosh	WI	54901	920-114-0057	920-049-6600

O*NET Interest Profiler: Career List

Your interest results:

Realistic	9
Investigative	2
Artistic	21
Social	36
Enterprising	26
Conventional	6

Your Job Zone:

Job Zone Two
Some Preparation Needed

Careers that fit your interests and preparation level:

 Best fit  Great fit

-   Childcare Workers
-  Funeral Attendants
-  Locker Room, Coatroom, & Dressing Room Attendants
-   Nannies
-  Public Address System & Other Announcers
-  Crossing Guards
-  Hosts & Hostesses, Restaurant, Lounge, & Coffee Shop
-  Actors
- Singers
-  Waiters & Waitresses

Other careers that fit your interests:

Job Zone One: Little or No Preparation Needed





















 Best fit  Great fit

-   Food Servers, Nonrestaurant
- Amusement & Recreation Attendants
-  Baristas
- Counter & Rental Clerks
-  Counter Attendants, Cafeteria, Food Concession, & Coffee Shop
- Door-To-Door Sales Workers, News & Street Vendors, & Related Workers
- Models




















5/8/2019

O*NET Interest Profiler: Career List at My Next Move

Job Zone Three: Medium Preparation Needed
 Best fit
  Great fit

-   Concierges
-   Fitness Trainers & Aerobics Instructors
-   Preschool Teachers
-   Residential Advisors
-   Self-Enrichment Education Teachers
-   Tour Guides & Escorts
-   Flight Attendants
-   Hairdressers, Hairstylists, & Cosmetologists
-  Morticians, Undertakers, & Funeral Directors
-  Psychiatric Technicians
-   Skincare Specialists

Job Zone Four: High Preparation Needed
 Best fit
  Great fit
























-  Adult Basic & Secondary Education & Literacy Teachers & Instructors
-  Career/Technical Education Teachers, Secondary School
-   Child, Family, & School Social Workers
-  Choreographers
-  Directors, Religious Activities & Education
-   Education Administrators, Preschool & Childcare Center/Program
-   Health Educators
-  Kindergarten Teachers
-  Middle School Teachers
-   Patient Representatives
-  Public Relations Specialists
-  Radio & Television Announcers
-  Recreation Workers
-  Recreational Therapists
-  Secondary School Teachers
-   Social & Community Service Managers

<https://www.mynextmove.org/explore/ip-print?t=o&z=2&i=090221362606>

2/4
























5/8/2019

O*NET Interest Profiler: Career List at My Next Move

-  Special Education Teachers, Middle School
-   Training & Development Managers
-   Training & Development Specialists
-   Adapted Physical Education Specialists
-  Broadcast News Analysts
-   Community Health Workers
-   Directors- Stage, Motion Pictures, Television, & Radio
-  Emergency Management Directors
-  Equal Opportunity Representatives & Officers
-   Midwives
-  Music Directors
-  Park Naturalists
-  Probation Officers & Correctional Treatment Specialists
-   Public Relations & Fundraising Managers
-  Special Education Teachers, Kindergarten & Elementary School
-  Special Education Teachers, Secondary School

Job Zone Five: Extensive Preparation Needed

 **Best fit**  **Great fit**

-   Arbitrators, Mediators, & Conciliators
-  Clergy
-  Education Administrators, Elementary & Secondary School
-   Educational, Guidance, School, & Vocational Counselors
-   Political Science Teachers, Postsecondary
-   Architecture Teachers, Postsecondary
-   Art, Drama, & Music Teachers, Postsecondary
-   Business Teachers, Postsecondary
-   Communications Teachers, Postsecondary
-   Education Teachers, Postsecondary
-  Graduate Teaching Assistants
-   Healthcare Social Workers
-   Instructional Coordinators

<https://www.mynextmove.org/explore/ip-print?t=o&z=2&i=090221362606>

3/4

5/8/2019

O*NET Interest Profiler: Career List at My Next Move

-   Instructional Designers & Technologists
-   Marriage & Family Therapists
-   Rehabilitation Counselors
-   Substance Abuse & Behavioral Disorder Counselors

Special Notice: Proper Use of O*NET Interest Profiler Results

You **should use** your **O*NET Interest Profiler** results to explore the world of work and identify careers that may satisfy what is important to you in a job-your interests. You will be able to look at the interests satisfied by careers and compare them to your own interests. Talk to a vocational/employment counselor or teacher for more help on how to use your **O*NET Interest Profiler** results.

Your **O*NET Interest Profiler** results **should not be used** for employment or hiring decisions. Employers, education programs, or other job-related programs should not use your results as part of a screening process for jobs or training.

If you think that your **O*NET Interest Profiler** results are being used incorrectly, talk to your vocational/employment counselor, teacher, or program administrator. You also can contact the National Center for O*NET Development for assistance.

National Center for O*NET Development
Attention: Customer Service
P.O. Box 27625
Raleigh, NC 27611
Email: [O*NET Customer Service](mailto:onet@oncenter.org) (onet@oncenter.org)

Vocational Evaluation Report

Name: Serina Franklin **Length of Evaluation:** 3 days

Referral Question: How does Serina's back pain and previous opioid use affect her employability?

Background Information

Serina is a 22-year-old female, who sustained a back injury in a horse-riding accident ten years ago. The injury was diagnosed as a Herniated Disk this month. It was not treated or misdiagnosed previously. Consequently, Serina experiences chronic back pain and numbness in her legs. Serina self-medicated with opioids for pain control. This led to Serina's opioid abuse. Current medication is Suboxone. No other medications are prescribed to control pain due to history of abuse. Currently, Serina lives with her boyfriend and two youngest children. Boyfriend has been supportive of her recovery and assists with children in home. Serina has one other child and is on a reunification plan. Serina has a driver's license and current access to a vehicle. She has her GED.

Vocational History: (Employer/Job Title/Primary Duties)

2016-2017: The Bar/Bartender/trained employees, served drinks, coordinated events

2015-2016: Humane Society/Volunteer/walked animals, cleaned pens

2014-2015: The Post Office Bar/Bartender/served drinks, cleaned bar, handled money

Observations

Serina arrived 30 minutes late on the first day because "I forgot we had this today". During initial interview, Serina appeared relaxed. She engaged in conversation and shared personal details regarding history of addiction within the first 15 minutes. She mentioned several times on first day that she really wants to "get back to work for my kids". With 45 minutes left of day one, Serina asked to leave due to back pain. She called the next morning and said that she wouldn't be able to come in for day two due to pain. Day three, Serina arrived on time. Provided a list of tasks to be completed and observed her jump from one task to another multiple times throughout the day without fully completing any task. While completing assigned tasks, Serina conversed with other workers. Conversation was appropriate for a work setting. Often Serina would be so engaged in conversation that she would lose sight of the task that she was completing. Evaluator would remind her to get back on task. Serina completed full hours for day three.

Work Sample Administered

The Customer Service work sample was administered to determine her ability to complete work related to the customer service industry. The sample consisted of answering various customer emails, answering phone calls, and entering information into a data system. No accommodations were provided during this test, though Serina moved frequently, as she needed. While tasks were not fully completed, what she was doing was accurate.

Interpretation

The work sample results indicate that Serina would be able to complete a variety of customer service jobs but does require additional training. Serina shows high interest in communicating and working with people. This indicates the customer service industry would be a good fit for her. While Serina did do well with the data entry portion of her work sample, she states she is not interested in strictly data entry, as she needs to “work with people, not computers”.

Recommendations

1. **Employment:** Serina displays the ability to work in a customer service setting that allows her the flexibility to move around as needed. A call center would be an option with accommodations. However, prior to employment, Serina will have to develop strategies to maintain concentration on tasks on hand. It is recommended Serina volunteer to practice these strategies prior to moving into employment.
2. **Training:** Serina has the basic customer service skills from her work as a bartender but needs specialized training in specific job of interest. This could be call center or sales training. It is recommended that the training she completes is small, as she may focus on speaking with the other students rather than learning.
3. **Medical:** Serina needs to continue with physical therapy for improvement of her back pain to be able to work more than part-time hours long term. Poor memory and concentration are likely to be lifelong side effects of opioid abuse, so strategies will need to be developed to be effective in the workforce.

