

# **Initial Assessment Entry Guide – Part One**

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### W-2 Contact Information

Questions regarding this training material should be directed via your local agency process to the Partner Training Team,

Email: [PTTTrainingSupp@wisconsin.gov](mailto:PTTTrainingSupp@wisconsin.gov)

A contact person is available to answer e-mailed questions related to this training material, assist you in completing any activity that you are having difficulty with, and/or provide explanation of anything else about this training material.

Questions regarding W-2 production cases and systems should be directed via your local agency process to the BWF Work Programs Help Desk at:

Email: [bwfworkprogramshd@wisconsin.gov](mailto:bwfworkprogramshd@wisconsin.gov)

Telephone: (608) 422-7900.

W-2 Policy questions should be directed to your Regional Office staff.

DCF is an equal opportunity employer and service provider. If you have a disability and need information in an alternate format, or need it translated to another language, please contact (608) 535-3665 or the Wisconsin Relay Service (WRS) – 711.

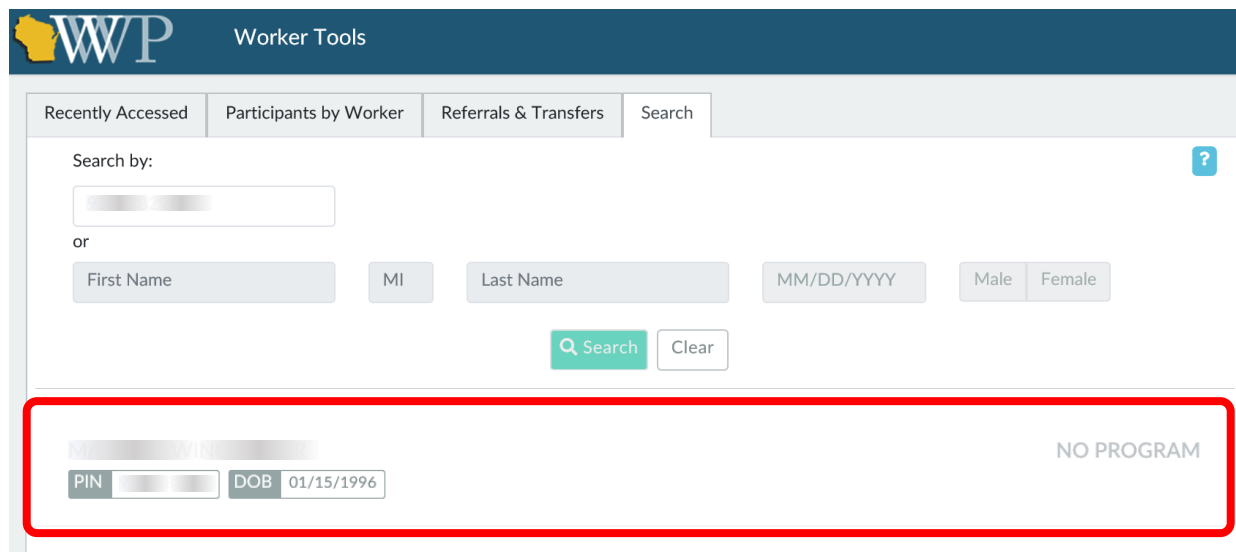
For civil rights questions call (608) 422-6889 or the Wisconsin Relay Service (WRS) – 711.

## Ana

You're meeting in person with Ana for her initial assessment. Before you can start making entries, you'll log into the WWP Training Environment.

- ☐ **Step 1:** Log on to WWP Training: <https://wwptrn.wisconsin.gov/>

## WWP Homepage



Worker Tools

Recently Accessed Participants by Worker Referrals & Transfers Search

Search by:

or

First Name MI Last Name MM/DD/YYYY Male Female

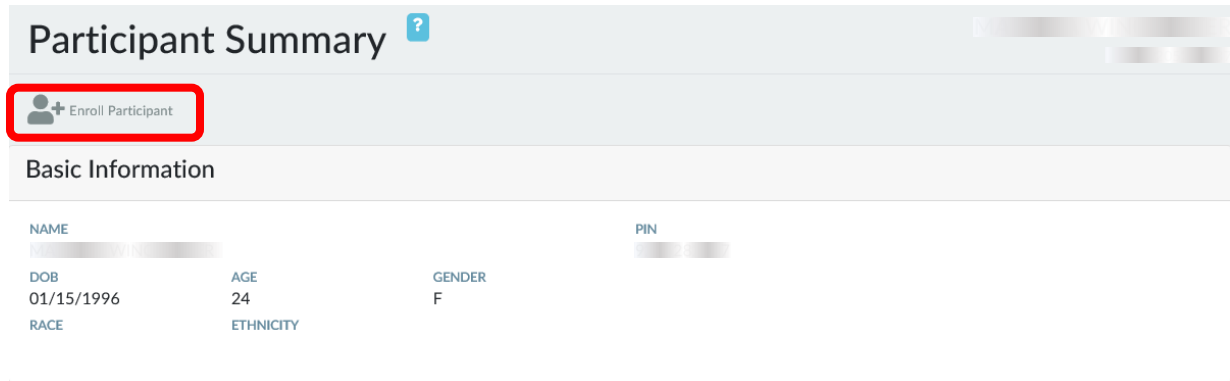
Search Clear

ANA NO PROGRAM

PIN DOB 01/15/1996

- ☐ **Step 1:** Click the Search tab.
- ☐ **Step 2:** Enter Ana's PIN in the **Search By** field.
- ☐ **Step 3:** Click to select Ana from the list.

## Participant Summary



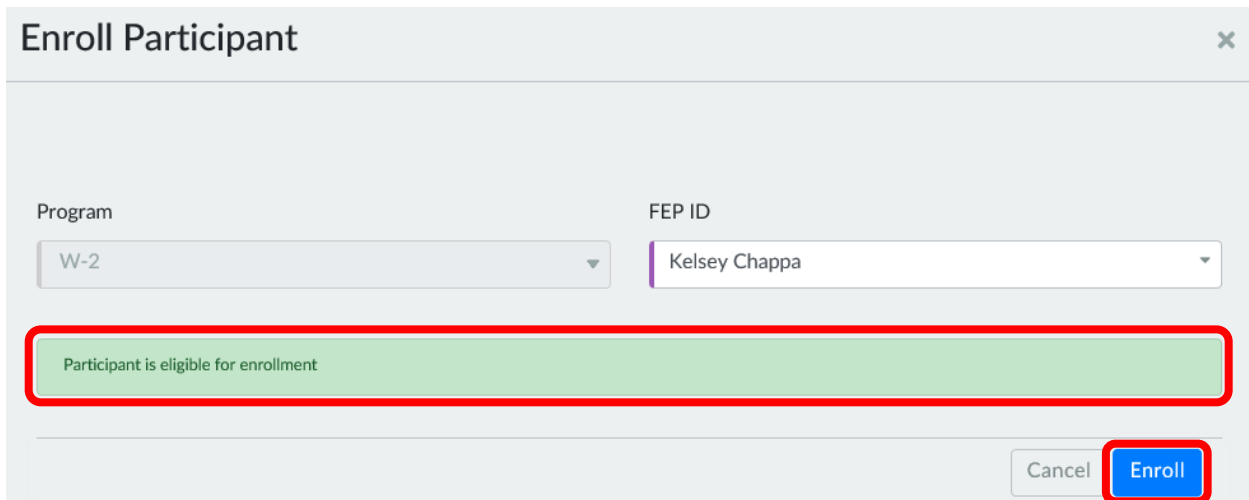
Participant Summary ?

+ Enroll Participant

Basic Information

NAME	[REDACTED]			PIN	[REDACTED]
DOB	AGE	GENDER			
01/15/1996	24	F			
RACE	ETHNICITY				

- ☐ **Step 1:** Click the Enroll Participant button.



Enroll Participant x

Program FEP ID

W-2 Kelsey Chappa

Participant is eligible for enrollment

Cancel Enroll

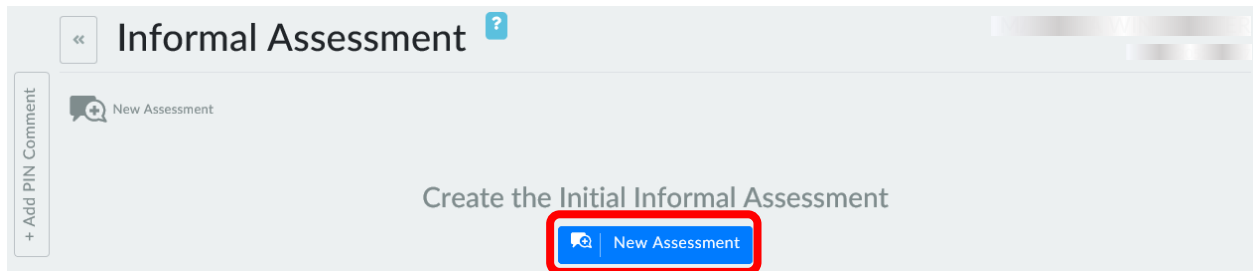
- ☐ **Step 2:** A dialog box opens for enrolling Ana.
- ☐ **Step 3:** In the **FEP ID** field, WWP enters the worker assigned on the **W-2 Request** page in CWW.
- **Note:** You can select another worker from the drop-down, if needed.
- ☐ **Step 4:** WWP displays a message indicating the participant is eligible for enrollment. If the participant is not eligible, it displays an error message. Click the Enroll button to enroll Ana.
- ☐ **Step 5:** When the dialog box closes, the **Participant Summary** page displays again.

# Informal Assessment



☐ **Step 1:** Click on **Case Management** to open the navigation toolbar.

☐ **Step 2:** Click on the Informal Assessment button.



☐ **Step 3:** Click on the New Assessment button.

# Languages

Ana fluently reads, writes, and speaks Spanish and English. She feels the fact that she is bilingual can be a great asset for her and is hopeful this skill will be useful to her as she looks for work.

## Languages ?

The following questions are about the language or languages that you read, write and speak.

	Language	Read	Write	Speak
What language do you use at home?	Spanish	Yes No	Yes No	Yes No
Which English skills do you have?	English	Yes No	Yes No	Yes No
List any other languages you know:		Yes No	Yes No	Yes No

+ Add Language

Do you need an interpreter? Yes No Details

Notes

1000 characters remaining

Save + Continue

- ☐ **Step 1:** For “What language do you use at home?” select SPANISH from the **Language** field drop-down menu.
- ☐ **Step 2:** Indicate that it is **Reads**, **Writes**, and **Speaks Spanish**.
- ☐ **Step 3:** Indicate that English is **Reads**, **Writes**, and **Speaks English**
- ☐ **Step 4:** Ana does not need an interpreter.

- ☐ **Step 5:** In the **Notes** field, include other helpful information that you haven't already entered on this page.
  - Example: *Ana is hopeful that her bilingual skills will be useful as she looks for work.*
- ☐ **Step 6:** Click + Continue to go to the next page.



## Work History

Ana is not currently employed. She's been looking for work on her own but has not found anything. She says nobody calls her back for an interview. She worked at Walgreens and Kwik Trip in the past. Juggling work with being a single parent has been a struggle. She really would like to get back into customer service jobs. Ana enjoys the customer service aspects of the jobs she's had, but she really wants a job with regular, consistent, 1st shift hours. Ana has never completed a career assessment.

### Work History ?

The following questions will address your previous and current employments, as well as any volunteer work. Additionally, we will discuss if there are any factors preventing you from working full time.

What is your employment status?

Full-Time Part-Time **Unemployed**

What is keeping you from working full-time? (Select all that apply.)

Select

Details

Have you ever been employed or performed volunteer work?

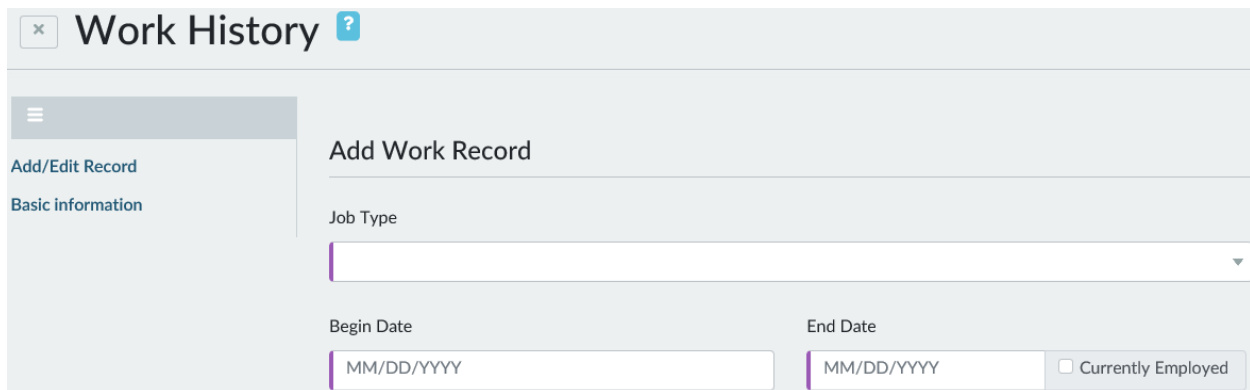
Yes No

+ Add Work History

- ☐ **Step 1:** For “What is your employment status?” select Unemployed.
- ☐ **Step 2:** For “What is keeping you from working full-time?” select LOOKING FOR WORK/NO WORK AVAILABLE from the drop-down menu.
- ☐ **Step 3:** In the **Details** field, enter *Nobody ever calls me back for an interview.*
- ☐ **Step 4:** Indicate that Ana has been employed before.
- ☐ **Step 5:** Click + Add Work History to record Ana's past employment.

Ana worked as a cashier at Walgreens in Platteville four years ago. The job lasted nine months before she was fired for poor attendance. She states it was difficult because this was her first 'real' job, and she had a hard time balancing work with being a mom. She worked an average of 30 hours/week at \$9.00/hour. Her job duties included waiting on customers, running the cash register, cleaning floors, and stocking shelves.

Ana worked at Kwik Trip in Platteville for the past two years. She quit three months ago when she was forced to switch from 1st shift to 2nd shift. She hated working 2nd shift because she never saw her daughter. Elena was at school during the day when Ana was home. Then, when Elena was home from school, Ana was at work. Elena was in bed before Ana got home. Ana's mother has always watched Elena when Ana was working, but Ana has no backup daycare provider for 2nd shift hours if her mother is unavailable. Her job duties were the same as at Walgreens, with the addition of setting up store displays. She worked an average of 35 hours/week at \$10.25/hour.



**Work History**

Add/Edit Record  
Basic information

**Add Work Record**

Job Type

Begin Date End Date

MM/DD/YYYY MM/DD/YYYY ☐ Currently Employed

- ☐ **Step 6:** You are now on a **Work History** details page. Select **UNSUBSIDIZED** as **Job Type**.
- ☐ **Step 7:** Enter a **Begin Date** and **End Date** to indicate the job lasted nine months approximately four years ago.

## Basic Information

Position


Company/Organization Name



FEIN

Location

Street Address

Zip



Job Duties

Reason for Leaving



- ☐ **Step 8:** Enter CASHIER as the **Position** and WALGREENS as the **Company/Organization Name**.
- ☐ **Step 9:** Start typing PLATTEVILLE as the **Location** and wait for the system to prompt you with Platteville, WI USA.
- ☐ **Step 10:** Begin entering the **Street Address** as 675 SOUTH WATER ST. Select the address from the suggestions.
- ☐ **Step 11:** Record her **Job Duties** per the scenario.
- ☐ **Step 12:** For **Reason for Leaving**, select FIRED from the drop-down. Enter *Lost job due to poor attendance* in the **Details** field.

## Current or Most Recent Wage/Hours

Pay Types (Select all that apply.)

Select ▾ Details

Beginning Rate

\$  per  ▾

Ending Rate

\$  per  ▾ ☐ no change

Avg Weekly Hours

Notes

1000 characters remaining

Save & Exit

- ☐ **Step 13:** In **Current or Most Recent Wage/Hours** section, select HOURLY WAGE from the **Pay Types** drop-down.
- ☐ **Step 14:** Enter her **Beginning Rate** as \$9.00 and select per HOUR from the drop-down menu. You must enter the zeros after the decimal point. They do not fill in automatically.
- ☐ **Step 15:** In the **Ending Rate** fields, check the box to indicate that there was No Change in her wage.
- ☐ **Step 16:** Enter her **Average Weekly Hours** as 30.
- ☐ **Step 17:** Enter any additional information provided in the **Notes** field.
  - Example: *Ana states it was difficult juggling being a new mom with work.*
- ☐ **Step 18:** Click Save & Exit. You are back on the **Work History** page. Click + Add Work History to record Ana's second job at Kwik Trip.
- ☐ **Step 19:** Select UNSUBSIDIZED as **Job Type**. Enter a **Begin Date** and **End Date** to indicate the job lasted two years and ended approximately three months ago.
- ☐ **Step 20:** Enter CASHIER as the **Position** and KWIK TRIP as the **Company/Organization Name**.

- ☐ **Step 21:** Enter PLATTEVILLE as the **Location**. Enter the **Street Address** as 430 SOUTH WATER St.
- ☐ **Step 22:** Record her **Job Duties** per the scenario.
- ☐ **Step 23:** In the **Reason for Leaving** field, select QUIT from the drop-down. In the **Details** field, enter *Hours changed from 1<sup>st</sup> to 2<sup>nd</sup> shift.*
- ☐ **Step 24:** In **Wages/Hours Information**, select HOURLY WAGE from the **Pay Types** drop-down. Enter her **Beginning Rate** as \$10.25 and select per HOUR from the drop-down menu. Check the box to indicate that there was No Change for the **Ending Rate**. Enter 35 as her **Average Weekly Hours**.
- ☐ **Step 25:** Enter any additional information provided in the **Notes** field.
  - Example: *Working 2<sup>nd</sup> shift caused difficulties for child care arrangements.*
- ☐ **Step 26:** Click Save & Exit.

Have you ever completed a career assessment either online, in a school setting or through a work program?

☐ Yes

☐ No

☐ Unknown

- ☐ **Step 27:** You are back on the **Work History** page. For “Have you ever completed a career assessment either online, in a school setting or through a work program?” select No.
- ☐ **Step 28:** Enter any additional information in the **Notes** field.
  - Example: *Ana really enjoys customer service jobs. She would like to find a 1<sup>st</sup> shift job with consistent hours.*
- ☐ **Step 29:** Click + Continue to go on to the next page.

## Work Programs

Ana has never participated in a work program. This is her first time requesting assistance of any kind.

### Work Programs ?

This section captures any past, present, or future participant involvement in work programs.

Have you, are you currently, or will you be involved in any other work programs?

Yes No

- ☐ **Step 1:** For “Have you, are you currently, or will you be involved in any other work programs?” answer No.
- ☐ **Step 2:** Click + Continue to go on to the next page.

## Education History

Ana is not currently in school. She completed 11th grade at Platteville High School. She dropped out at the start of her senior year due to some issues she doesn't feel comfortable discussing yet. She has started to think about getting her HSED now that her daughter, Elena, is school-aged, but she doesn't know where to start.

### Education History ?

The following questions are about your High School graduation status.

What is your high school graduation status?

Diploma GED HSED **None**

Have you ever attended school?

**Yes** No

### Last School Attended (K-12)

This does not include post-secondary schools or GED/HSED training centers

Location

City, State

School Name

Last Year  
Attended

YYYY

Last Grade Completed

Currently enrolled?

Yes No

Are you working towards a GED or HSED?

Yes No

- ☐ **Step 1:** Click None to indicate Ana's graduation status.
- ☐ **Step 2:** For "Have you ever attended school?" answer Yes.
- ☐ **Step 3:** In the **Last School Attended (K-12)** section, enter PLATTEVILLE in the **Location** field. Select Platteville, WI, USA from the suggested cities.
- ☐ **Step 4:** Enter the **School Name** PLATTEVILLE and select PLATTEVILLE HIGH SCHOOL from the suggested results.
- ☐ **Step 5:** Enter a year seven years ago in the **Last Year Attended** field.

- ☐ **Step 6:** For **Last Grade Completed**, select 11<sup>th</sup> GRADE from the drop-down menu.
- ☐ **Step 7:** Indicate that she is not “Currently Enrolled?” and not “Working towards a GED or HSED?”
- ☐ **Step 8:** Enter that she is interested in getting her HSED in the **Notes** field.
- ☐ **Step 9:** Click + Continue to go to the next page.



## Post-Secondary Education

Ana has not attended any post-secondary education.

### Post-Secondary Education ?

The following questions are about your post-secondary education, degrees, licenses and certifications.

Have you attended, or are you currently attending a college or university?

Yes No

Do you have or are you working towards any licenses or certificates?

Yes No

- ☐ **Step 1:** For “Have you attended, or are you currently attending a college or university?” answer No.
- ☐ **Step 2:** Indicate that Ana does not have, nor is she working toward, any “Licenses or Certificates.”
- ☐ **Step 3:** Click + Continue to go to the next page.

## Military Service

Ana has never served in the military.

### Military Service ?

The following questions are about your military history.

Do you have any military training?

Yes No

☐

**Step 1:** Indicate that Ana has no “Military Training.”

☐

**Step 2:** Click + Continue to go to the next page.

## Housing

Right now, Ana is renting and would like to find something cheaper. She doesn't want to continue asking her mom for help with rent. She is not at risk of an eviction or utility disconnection and has no housing-related difficulties for W-2 participation. You provide her with information about subsidized housing and your agency's Community Resource booklet highlighting the number for the local CAP agency.

### Housing ?

The following questions are about your current housing situation.



#### Current Address

Address	City	State	Zip	Subsidized	Rent Obligation
W6631 NORTH NORWAY HILLS LN	WAUTOMA	WI	54982	No	

#### Current Housing

Housing Situation

Begin Date

 MM/YYYY

Monthly Amount

 \$ 

☐ Unknown

Are you at risk of being evicted or forced to move?

Details

- ☐ **Step 1:** From the **Housing Situation** drop-down, select RENT/OWN (UNSUBSIDIZED). Enter a **Begin Date** of one year ago.  
The **Monthly Amount** is \$730.00.
- ☐ **Step 2:** For “Are you at risk of being evicted or forced to move?” answer No.

## Housing History

The following questions are about your previous housing situations over the past 2 years, including the begin and end month, if you were ever evicted or forced to move, and the amount of rent you were responsible for paying.

HOUSING SITUATION	BEGIN DATE MM/YYYY	END DATE MM/YYYY	EVICTED?	MONTHLY AMOUNT \$	
					✓
<div style="border: 1px solid #ccc; padding: 2px;"> <div style="background-color: #f0f0f0; padding: 2px;">DETAILS</div> <div style="padding: 2px;">Details</div> </div>					<div style="border: 1px solid #ccc; padding: 2px;"> <div style="background-color: #f0f0f0; padding: 2px;"></div> <div style="padding: 2px;"> </div> </div>

Are you at risk of having a utility disconnected?

Does your current housing situation make it hard to work or participate in work activities?

**Action Needed** ?

☐ No Action Needed

- ☐ **Step 3:** Click on the + Add Housing Situation button. Enter information showing Ana previously rented (unsubsidized) beginning two years ago, and she rented for one year. She was not evicted, and the monthly rent was \$650.00. After completing the entry, click on the Save button (check-mark) to save it.
- ☐ **Step 4:** For the questions “Are you at risk of having a utility disconnected?” and “Does your current housing situation make it hard to work or participate in work activities?” answer No.
- ☐ **Step 5:** In the **Action Needed** section, Check the box to indicate that there is No Action Needed.
- ☐ **Step 6:** Include any additional information in the **Notes** field.
  - Example: *Ana is concerned that her rent is too high and would like to find a cheaper apartment.*

Click + Continue to go to the next page.

# Transportation

She has a valid driver's license and a vehicle to use. Transportation assistance would be helpful for her to participate in activities.

## Transportation ?

If you don't have reliable transportation, it can be more difficult to find or keep a job. The following questions are about the methods of transportation that are currently available to you, including your driver's license status.

Which transportation methods can you use to participate in work or work activities? (Select all that apply.)

Personal Vehicle ▼	Details
--------------------	---------

Is the vehicle insured?

Yes	No	Unknown	Details
-----	----	---------	---------

Is the vehicle registration current?

Yes	No	Unknown	Details
-----	----	---------	---------

☐ **Step 1:** For “Which transportation methods can you use to participate in work or work activities?” select PERSONAL VEHICLE from the drop-down.

☐ **Step 2:** Indicate that the vehicle “Is Insured” and “Registration current.”

Do you have a valid driver's license?

Yes No

State Issued ▼	Expiration Date Month and Year MM/DD/YYYY	List Any Driving Restrictions
-------------------	--	-------------------------------

Have you ever had a commercial driver's license (CDL)?

Yes No

☐ **Step 3:** For “Do you have a valid driver's license?” answer Yes.

☐ **Step 4:** Select WISCONSIN as the **State Issued** and enter 06/01/2035 as the **Expiration Date**. Ana has no restrictions.

☐ **Step 5:** For “Have you ever had a commercial driver's license (CDL)?” answer No.

☐ **Step 6:** Check the No Action Needed box, and click + Continue to go on to the next page.

## Legal Issues

Ana has no legal issues.

### Legal Issues ?

Sometimes having legal issues can affect someone's ability to find and keep a job. The following questions are about legal issues that you may have.

Have you ever been convicted of a misdemeanor or felony?

Yes No

Do you have any pending charges?

Yes No

Are there currently any restraining orders against you?

Yes No

Do you currently have a restraining order against anyone to prevent that person from contacting you?

Yes No

Do you have any immediate family members with legal issues?

Yes No

Have you been ordered to appear for any upcoming court dates?

Yes No



### Action Needed ?

☐ No Action Needed

+ Coordinate with Community Corrections Agent

+ Refer for Legal Assistance

+ Refer to External Agency

+ Other

☐

**Step 1:** Answer No for all the questions on this page.

☐

**Step 2:** Check the box to indicate that there is No Action Needed.

☐

**Step 3:** Click + Continue to go on to the next page.

## Participant Barriers

Ana reports there is nothing she can think of that would be a barrier to employment. She is in the appointment by herself, so you determine that it is safe and appropriate to ask questions about any domestic violence issues. Ana reports there is nothing like that going on.

### Participant Barriers ?

The following questions are about your health and wellness. We will use this information to help you get any accommodations that you may need to find and keep a job.

#### Physical Health

Do you have any health problems that make it hard to manage your daily life?

☒ Yes

☐ No

☐ Refused

Do you have concerns that problems with your health will make it hard to participate in work activities?

☒ Yes

☐ No

☐ Refused



**Step 1:** Answer No for the **Physical Health** questions.

#### Mental Health

Have you ever met with a counselor or psychiatrist for mental health services or been diagnosed with a mental health condition?

☒ Yes

☐ No

☐ Refused

Do you have any mental health conditions that make it hard for you to manage your daily life?

☒ Yes

☐ No

☐ Refused

Do you have concerns that a mental health condition will make it hard for you to participate in work activities?

☒ Yes

☐ No

☐ Refused



**Step 2:** Answer No for the **Mental Health** questions.

## AODA

Does alcohol or drug use make it hard for you to manage your daily life?

☐ Yes

☐ No

☐ Refused

Do you have concerns that alcohol or drug use will make it hard for you to participate in work activities?

☐ Yes

☐ No

☐ Refused



**Step 3:** Answer No for the **AODA** questions.

## Cognitive and Learning Needs

Did you ever have problems learning in school or have you ever been diagnosed with a learning disability?

☐ Yes

☐ No

☐ Refused

Do you have learning problems that make it hard to manage your daily life?

☐ Yes

☐ No

☐ Refused

Do you have concerns that learning problems will make it hard to participate in work activities?

☐ Yes

☐ No

☐ Refused



**Step 4:** Answer No for the **Cognitive and Learning Needs** questions.

Display next section?

☐ Yes

☐ No

Please read the following to the participant:



**Step 5:** Answer Yes to **Display next section?** Answer No for each of the questions, as Ana is not experiencing any domestic violence issues.



**Step 6:** Click + Continue to go on to the next page.





## Child and Youth Supports

Ana has informal daycare for Elena. Her mom usually watches Elena, but Ana is interested in Wisconsin Shares. She thinks certified daycare might be more stable because sometimes her mom has other appointments and cannot watch Elena. You provide her with information for Income Maintenance (IM) so she can apply.

### Child and Youth Supports ?

The following questions are about your children, whether you need assistance in setting up child care arrangements, and what other services might be available to help you and your children.


**Children**

Name	DOB	Age	Gender	Relationship
	2/28/14	6	F	DAUGHTER

Do you have any children age 12 years old or under?

☒ Yes
 ☐ No

- ☐ **Step 1:** For “Do you have any children 12 years old or under?” answer Yes.
- ☐ **Step 2:** Enter the **First Name**, **Last Name**, and **Date of Birth** for Elena to match what is showing in the referential information. For **Care Arrangement**, select INFORMAL from the drop-down menu.
- ☐ **Step 3:** Indicate that Elena does not have special needs.
- ☐ **Step 4:** Enter a description of the current informal arrangement in the **Details** field.
  - Example: *Ana’s mom watches Elena.*

Do you have any children age 13 to 18 with special needs in need of child care?

Yes No

Questions about WIC and Head Start are only displayed for participants with children under the age of 5 years old.

Do any of your children participate in after school or summer programs? (Examples include the Boys and Girls Club, YMCA and other youth groups)

Yes No

Do any of your children participate in mentoring programs? (Examples include Big Brothers/Big Sisters and Community Action Programs)

Yes No

Do any of your children currently have a child welfare worker? This includes any children who live with another person most of the time.

Yes No Unknown

Did you or will you age out of foster care?

Yes No

Will there be any changes with your child care in the near future?

Yes No

- ☐ **Step 5:** For “Do you have any children 13 to 18 with special needs in need of child care?” answer No.
- ☐ **Step 6:** For “Do any of your children participate in after school or summer programs? (Examples include the Boys and Girls Club, YMCA and other youth groups)” and “Do any of your children participate in mentoring programs? (Examples include Big Brothers/Big Sisters and Community Action Programs)” answer No.
- ☐ **Step 7:** Elena does not have a Child Welfare worker. Ana has never been in foster care. Ana is not expecting any changes to Child Care.
- ☐ **Step 8:** Enter any other information provided in the **Notes** field.
- ☐ **Step 9:** Check the No Action Needed box, and click + Continue to go to the next page.

# Family Barriers

Ana states Elena has no barriers.

## Family Barriers ?

The following questions are about issues that your family is currently facing, including whether you or anyone in your family has applied for or received SSI/SSDI.

### SSI/SSDI

Have you ever applied for SSI or SSDI?

Yes No

Are you interested in learning more about the SSI/SSDI application process?

Yes No

Has anyone in your family ever applied for SSI or SSDI?

Yes No

☐

**Step 1:** Answer No to the **SSI/SSDI** questions.

Do you have caretaking responsibilities for any family members in your household due to health problems or other special needs?

Yes No

Do any family members in your household engage in risky activities such as excessive use of drugs or alcohol, illegal activity, or gang involvement?

Yes No

Do any of the children in your household have other behavior problems that will affect your ability to participate in work activities?

Yes No

Are any of the children in your household at risk of suspension or expulsion from school?

Yes No

Are there any other issues with your family that may affect your ability to participate in work activities?

Yes No

☐

**Step 2:** Answer No to the **Family Needs** questions.

☐

**Step 3:** Check the No Action Needed box.

☐

**Step 4:** Click + Continue to go on to the next page.

## Non-Custodial Parents

Ana is not a non-custodial parent.

### Non-Custodial Parents ?

If you are a non-custodial parent, the following questions will help us learn more about the child or children that don't live with you most of the time.

Do you have any children 18 or under who live with another individual most of the time?

Yes No


- ☐ **Step 1:** For “Do you have any children 18 or under who live with another individual most of the time?” answer No.
- ☐ **Step 2:** Click + Continue to go on to the next page.

## NCP Referral

Damien is not paying child support or spending time with Elena. Ana does not think he would be interested in a work program.

### NCP Referral ?

The following questions are intended to help us determine whether our agency could offer services to help the non-custodial parent of your child or children.


**Children**

Name	DOB	Age	Gender	Relationship
	2/28/14	6	F	DAUGHTER

Do you have any children age 18 or under whose other parent isn't living with you?

- ☐ **Step 1:** For “Do you have any children age 18 or under whose other parent isn’t living with you?” answer Yes.

**Other Parent**


**Children**

First Name
Last Name

Is this parent currently working or available for work?

Do you think this parent would be interested in participating in a work program?

Do you know how to get in contact with this parent?



First Name
Last Name

How often does the other parent have contact with the child?

Is there a child support order for this child?

- ☐ **Step 2:** Enter the **First Name** DAMIEN and **Last Name** (Use the last name you entered for Damien in CWW) as the **Other Parent**.
- ☐ **Step 3:** For “Is the parent currently working or available for work?” answer No.
- ☐ **Step 4:** For “Do you think this parent would be interested in participating in a work program?” answer No.
- ☐ **Step 5:** Indicate that Ana knows how to contact Damien. Click on the add button next to the No Contact Selected field. In the drop-down box under Contact Title, select Non-Custodial Parent. Enter Damien’s name and phone number in the appropriate fields and click Save.
  - **Note:** Enter the phone number you entered for Damien in CWW.She has no other contact with him.
- ☐ **Step 6:** Enter Elena as the **Child**.
- ☐ **Step 7:** For “How often does this parent have contact with the child?” select NO CONTACT from the drop-down.
- ☐ **Step 8:** Indicate that there is a “child support order,” the order is for \$ 200 however, Damien is not paying at this time. Enter *\$200 per month* in the **Details** field.

Notes

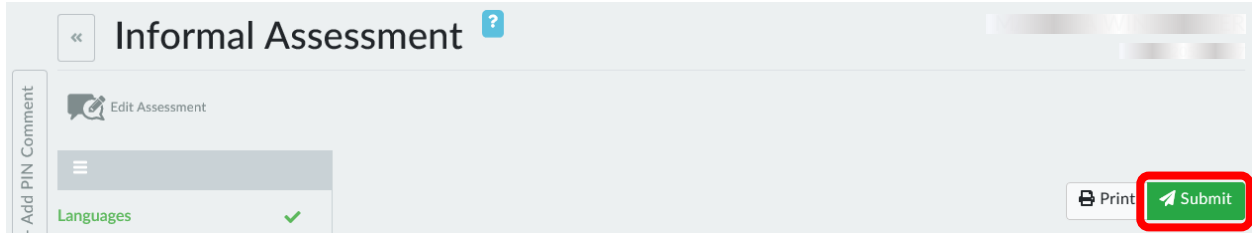
1000 characters remaining

Save

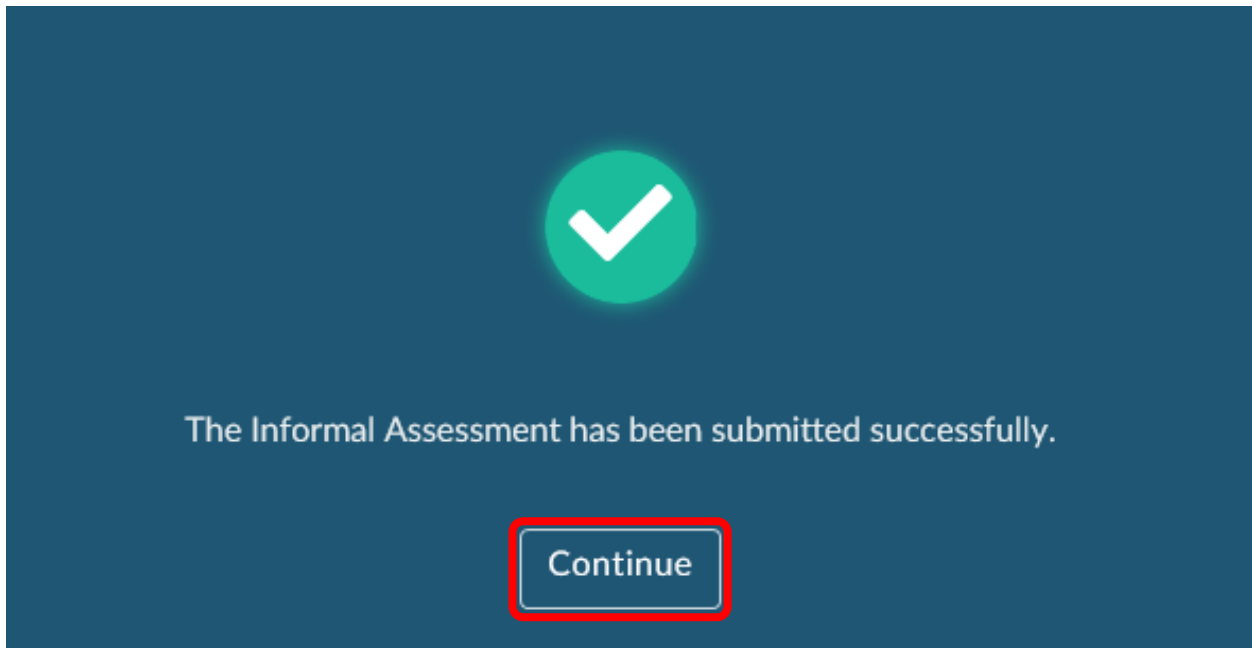
+ Exit

- ☐ **Step 9:** Click + Exit to go to the **Informal Assessment Summary** page.

## Informal Assessment Summary

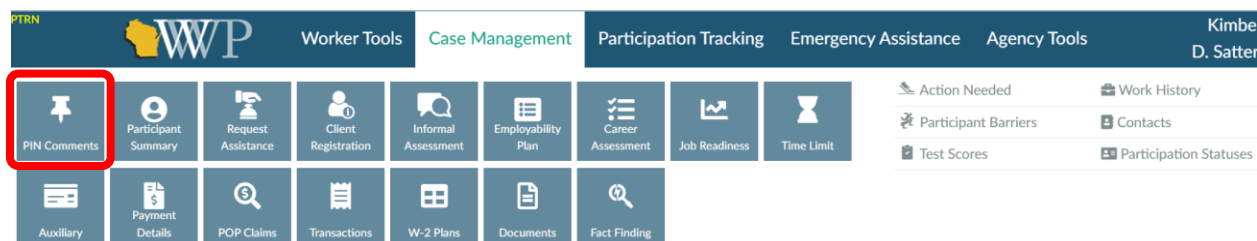


**Step 1:** Click the Submit button to submit Ana's Informal Assessment.



**Step 2:** Click Continue.

## PIN Comments



**Step 1:** Click the **Case Management** navigation toolbar and click **PIN Comments**.

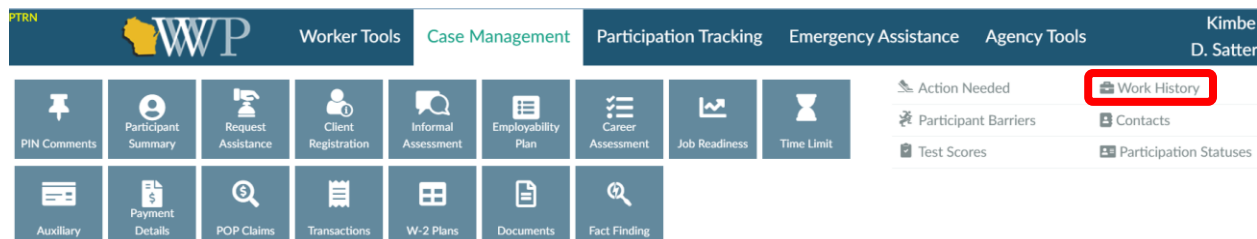


**Step 2:** From the **PIN Comments** page, click the + Add PIN Comment button.



- ☐ **Step 3:** Select Successful for **Participant Contact** and IN-PERSON for **Contact Method**. WWP automatically enters today's date as the **Contact Date**.
- ☐ **Step 4:** Enter comments to summarize Ana's Informal Assessment, and document any information you haven't already recorded in WWP.
- Example: *Ana reads, writes, and speaks Spanish and English. She is not currently employed, and has experience working as a cashier at Walgreens and Kwik Trip. She hasn't worked for the last three months, but has been looking for work. She wants to find 1st shift, customer service work with consistent hours. Ana's highest level of education is 11th grade. She is interested in getting her HSED. She has never participated in another work program or served in the military. Ana currently is renting an apartment, but is concerned her rent is too high. I referred her to subsidized housing and provided the contact information for the local CAP agency. Ana has her own vehicle and a valid driver's license. Ana expressed a need for transportation assistance and I will provide gas cards for her to attend appointments and complete activities. Ana reports no legal issues, personal barriers, family barriers, or children living outside the household. Her mom watches Elena when she's not in school, but Ana would like to find a more stable childcare arrangement. I provided her the contact information for Wisconsin Shares. She has no contact with Elena's father, Damien.*
- ☐ **Step 5:** Select INFORMAL ASSESSMENT for **Comment Type**. Leave Add Worker Task? as No. Click Save.

# Work History App



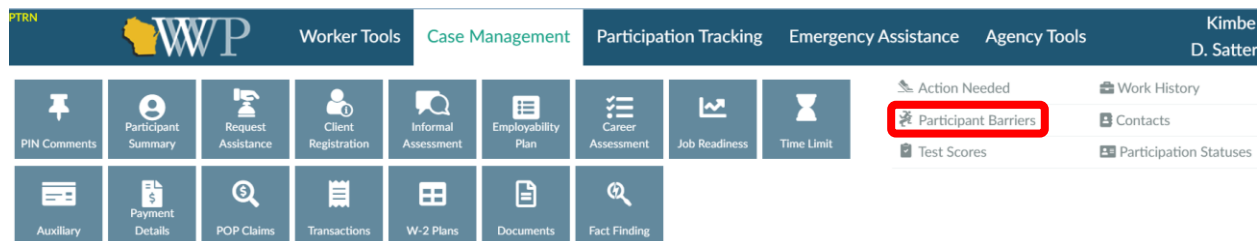
**Step 1:** Using the **Case Management** navigation toolbar, click on the Work History app.



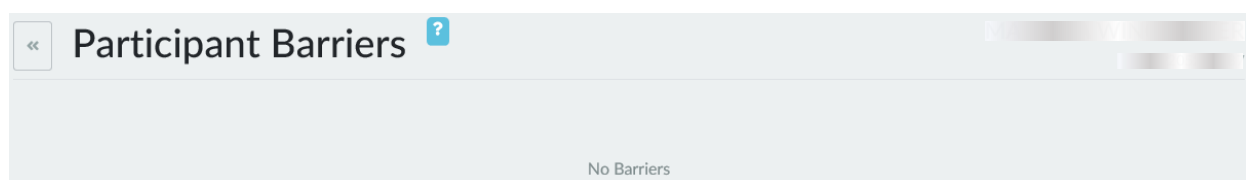
**Step 2:** Review Ana's two work history entries:

- Walgreens, and
- Kwik Trip

## Participant Barriers App

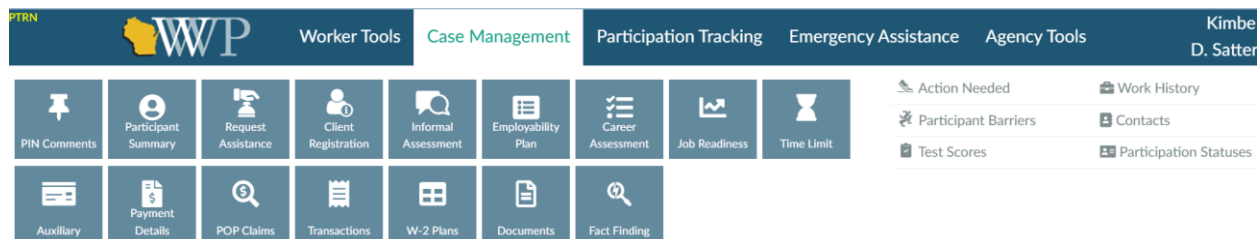


**Step 1:** Using the **Case Management** navigation toolbar, click on the Participant Barriers app.

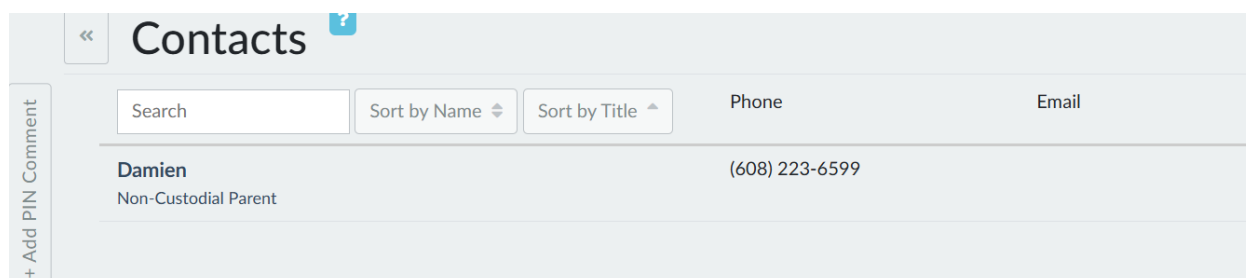


**Step 2:** Ana has no barriers at this time.

# Contacts App



**Step 1:** Using the **Case Management** navigation toolbar, click on the Contacts app.



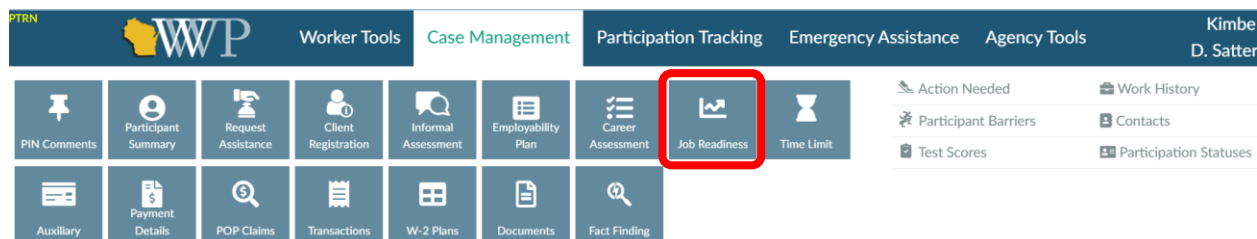
**Step 2:** The only contact listed at this time is Damien.

## Job Readiness Assessment

You start the Job Readiness Assessment with Ana, focusing on the work preference and contact questions. Ana wants to work in an office setting as a receptionist, or perhaps in customer service. She states she likes working with people and is a good communicator. Ana understands that to be best qualified for these types of jobs, she needs to obtain her HSED. Right now, she is unsure who may be hiring for these types of jobs and would like assistance in identifying potential employers. Ideally, she would like to avoid working with a micro-manager, and she would prefer a first shift job about 20 minutes or 10 miles from home.

Both Ana's voicemail and email are set up to accept calls and messages from potential employers. She always has her phone with her and can check voicemail throughout the day. Ana further explains that although she has an email address, she doesn't always have internet access to check it. You and Ana discuss where she can go to check her email, and come up with a plan for her to check it at the library or the Job Center at least four times a week.

You will continue assessing the information on this page with Ana at a future appointment.



- ☐ **Step 1:** Click on the **Job Readiness** icon from the **Case Management** navigation toolbar.
- ☐ **Step 2:** Enter Ana's responses to the **Work Preferences Questions** and **Contact Questions**.
  - Your entries should reflect Ana's scenario. Include as many specific details as you can, such as the availability of her contact methods.

**Job Readiness** ?

**Required information not provided** X

The following information is needed to complete this section:

- Last Job
- Accomplishment
- Strengths
- Areas To Improve
- Can Submit Online
- Current Resume
- Professional Reference
- Documents Needed For Employment
- Last Interview Details
- Social Media
- Have Outfit

- ☐ **Step 3:** Click Save.
- The **History Questions, Application Questions, and Interview Questions** will turn red, and a banner will appear at the top of the page stating *Required information not provided. The following information is needed to complete this section:* We will enter this information for Ana later.

**Action Needed** ?

☐ No Action Needed

- + Refer for Career Services
- + Refer for Clothing Resources
- + Refer for Wisconsin Lifeline Phone Service
- + Other

Cancel **Save with Errors**

- ☐ **Step 4:** Click Save with Errors.

**Participant Summary** ?

**Basic Information**

NAME	AGE	GENDER	PIN
01/26/1997	24	F	
RACE	ETHNICITY		
White	Hispanic – Yes		

**+ Add PIN Comment**

Task

- ☐ **Step 5:** You are now on the **Participant Summary** page. Click + Add PIN Comment from the side of the page.



**Step 6:** Record new PIN Comments summarizing Ana's job readiness.

- Select Successful as the or **Participant Contact** and In-Person for **Contact Method**.
- Example: *I discussed the Work Preferences and Contact Questions with Ana during today's appointment, and will complete the remaining questions at a future appointment. Ana wants to work in an office setting as a receptionist or in customer service because she thinks she is a good communicator and likes to work with people. She identified she needs to get her HSED to get a job in these fields. Ana wants to avoid working for a micro-manager, and would like 1st shift work within 20 minutes or 10 miles from home. Her voicemail and email are set up. Ana states she doesn't always have internet access to check her email. We discussed locations she can check her email, and she decided she will check it at the library or the Job Center at least four times a week.*
- Select JOB READINESS/CAREER ASSESSMENT as the **Comment Type** and click Save.



You're at the end of Ana's entries for Initial Assessment.

- Send an email to [PTTTrainingSupp@wisconsin.gov](mailto:PTTTrainingSupp@wisconsin.gov).
- Subject Line: **Initial Assessment Ana**, and Ana's PIN.

A trainer will review your entries and provide feedback.