

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

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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.

## Brittany

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Brittany is a single mom to two children: her son, Mason, who is 9 years old; and her daughter, Ella, who is 3 weeks old. Brittany is dating Ella's other parent, Viktor. Viktor provides assistance with Ella. He came with Brittany to her appointment to help her with Ella. Brittany states Viktor can sit with her during this appointment.

- ☐ **Step 1:** Log on to WWP. Search for Brittany's PIN and select her from the list.
- ☐ **Step 2:** Click the Enroll Participant button. Enroll Brittany.

## Informal Assessment Driver Flow

All household members speak English at home. Brittany does not speak any other languages.

- ☐ **Step 1:** Start the Informal Assessment Driver Flow for Brittany. She reads, writes and speaks English at home.

Brittany is not currently employed but has been employed in the past. She did complete a career assessment at one time but does not remember when or what the results stated. Brittany had a full-time (40 hrs/wk) factory/manufacturing job, which she enjoyed. She lost that job due to Mason's barriers, which includes a diagnosis of Autism. It's difficult for Brittany to find child care for a child with special needs. At this time, she has no idea what job may work for her. When her job started, Brittany earned \$18.50/hour. By the time her job ended, she was making \$21.00/hour. She was responsible for setting up, operating, and tending to plastic molding machines. Brittany knows she is going to need a job with a flexible schedule and a child care option that is able to provide care to Mason.

- ☐ **Step 2:** Brittany is unemployed due to Caring for a Family Member. Provide details. She has completed a Career Assessment.
- ☐ **Step 3:** Click + Add Work History. She had a full-time unsubsidized job for four years. It ended one year ago. She was a Molding Technician at Asyst in Kenosha, located at 5811 99<sup>th</sup> Avenue. Add her **Job Duties** and **Reason for Leaving**. Her starting wage was \$18.50/hr., and her ending wage was \$21.00/hr. Enter any additional information provided in the **Notes** field. Click Save and Exit.

Brittany has not participated in other work programs. Brittany graduated from Tremper High School in Kenosha 16 years ago. After high school, Brittany started at Gateway Tech in Kenosha in the Accounting program. She attended for two semesters. She says college wasn't for her at that time, and she dropped out because she was not enjoying it. Her close friends were not in school. They were all working and making money, and she wanted to do the same. She wishes she would have finished her degree. Brittany feels that obtaining a degree would make it easier to get a job.

- ☐ **Step 4:** Brittany is not involved in any other work programs.
- ☐ **Step 5:** She got her diploma from Tremper High School in Kenosha 16 years ago.
- ☐ **Step 6:** Brittany attended Gateway Technical College in Kenosha 15 years ago. She completed two semesters in accounting. She does not have a degree, nor is she working toward any licenses or certificates. Add any additional information provided in the **Notes** field.

Brittany has never served in the military. She has been in her current apartment for about one year. Her rent is \$1050 per month. She is not at risk of an eviction, has no risk of utility disconnection, and has no housing related difficulties to participation in the program. Viktor helps with rent when he can. Brittany likes where she lives, as it's quieter than her previous apartment. This is beneficial for Mason. Brittany has a past housing history. The previous place she rented was very noisy, which made Mason's medical issues worse. She left that apartment after living there for about two years. Her rent was \$985 per month.

- ☐ **Step 7:** Brittany has never served in the military.
- ☐ **Step 8:** Brittany is renting. Record her monthly rent. She is not at risk of eviction or utility disconnection, and her housing does not cause difficulties. Enter Brittany's past housing history, including **Details** explaining why she moved. There is no action needed on this page. Add any additional information in the **Notes** field.

Brittany needs a job on a bus line, as she does not have a vehicle and uses public transportation. Her driver's license is suspended because she has fines she cannot afford to pay. Bus passes would be helpful in order for her to participate in activities. She is not experiencing any legal issues at this time.

- ☐ **Step 9:** Brittany uses Public Transit. Include **Details** about why her driver's license is suspended. She has no CDL.
- ☐ **Step 10:** Indicate that Brittany has no legal issues.

Brittany says she was diagnosed with Postpartum Depression shortly after Ella was born. She thinks it might be a barrier to participating in work activities at this time. She says she has been seeing a counselor and provides her information. Her counselor's contact information: Jane Jones, jonesj@communitypartners.org, 952-555-1444. Brittany signs a release of information form allowing you to communicate with Jane. You discuss referring Brittany for a formal assessment, which she agrees to. Using the current information, you provide accommodations for her concentration deficits and sleep disorder.

Brittany identifies no other concerns. You determine that it would not be appropriate to ask her questions related to domestic violence, as Viktor is in the office with her. You will ask Brittany those questions during a different appointment where Viktor is not in attendance.

- ☐ **Step 11:** Enter Brittany's mental health barrier. She does feel that this will affect her participation in work programs right now. Click + Add Barrier.

- ☐ **Step 12:** You are now on the **Participant Barrier** page. The **Barrier Type** should auto populate to MENTAL HEALTH. From the **Barrier Subtype** drop-down menu, select DEPRESSIVE DISORDER. Enter the **Onset Month**. Record contact details for her counselor, Jane. Use the TREATMENT/ASSESSMENT PROVIDER as the **Contact Type**. You refer Brittany for a formal assessment today.

**Accommodations**

Are accommodations needed for this barrier? Yes No

Accommodation for	Begin Date	End Date	Details
<input type="text"/>	<input type="text" value="MM/DD/YYYY"/>	<input type="text" value="MM/DD/YYYY"/>	<input type="text" value="Details"/>

[+ Add Accommodation](#)

- ☐ **Step 13:** Include accommodations for the two symptoms she is experiencing – concentration deficits and sleep disorder. List the specific accommodations you plan on providing in the **Details** field.

○ For example:

*Concentration Deficits: Brittany carries a notebook with her while participating in activities. The notebook is filled with items she needs to complete, and it helps her to focus or refocus as needed.*

*Sleep Disorder: Brittany is allowed to flex her schedule as needed to accommodate her sleep issues.*

Click Save and Exit.

- ☐ **Step 14:** Brittany has no other barriers. Answer No to **Display next section?**

Both of Brittany's children are under 12 years old. There are no daycare arrangements yet for Ella. Brittany will need daycare to participate in the program. Brittany has certified daycare after school for Mason when his behavioral issues allow him to attend. Mason has special needs. He was diagnosed with Autism about four years ago. The family participates in the Birth to 3 program and receives WIC, but not Head Start. The family does not participate in any other program. You provide Brittany with information on child care resources, Head Start, and Wisconsin Shares.

- ☐ **Step 15:** Brittany has two children 12 years of age or under. Enter Mason's information. Include that he has certified afterschool care, and indicate that he has special needs. In the **Details** field, explain Mason's child care situation. Click + Add Child. Enter Ella's information, indicating that there is no childcare arrangement at this time.

- ☐ **Step 16:** The family is participating in a Birth to 3 program and receives WIC services.

Mason receives SSI for autism. Due to his behavior issues related to his disability, Mason requires supervision at all times, and Brittany could be called to the school at any time. This makes it difficult for Brittany to participate in other activities. Brittany will need a flexible work activity schedule due to Mason's barriers. You plan to provide the "Need to Care for Disabled Family Member Form" to Brittany at the end of the appointment.

- ☐ **Step 17:** Indicate that Brittany has a family member receiving SSI, and has caretaker responsibilities for Mason. Include **Details** for both. She is concerned that these responsibilities will affect her ability to participate. Mason's disability causes behavioral problems. Indicate that you need to provide the "Need to Care for a Disabled Family Member" form to Brittany, but you have not yet provided it.

Mason and Ella are Brittany's only children. She is not an NCP. Mason's father, Simon, is somewhat in the picture. Simon is working, and Brittany does not think he would be interested in a work program. She provides a phone number to contact Simon. He sees Mason 1-3 times per month. Simon says he would spend more time with Mason, but he doesn't know how to handle Mason's behavioral issues. There is a child support order for \$200 per month, and Simon pays regularly.

Viktor is working and is not interested in a work program. Brittany provides Viktor's phone number and address. Viktor sees Ella 1-2 times per week. There is no child support order in place yet.

- ☐ **Step 18:** Answer No to the question on the **Non-Custodial Parents** page.
- ☐ **Step 19:** Enter **Other Parent** information to include details about Simon, including his contact information. Enter **Children** information to include details about Simon's involvement with Mason. Click + Add Other Parent & Child(ren). Enter **Other Parent** information to include details about Viktor, including contact information. Enter **Children** information to include details about Viktor's involvement with Ella.
- ☐ **Step 20:** Click the Submit button to complete Brittany's Informal Assessment Driver Flow.
- ☐ **Step 21:** Review the apps under the **Case Management** toolbar. There should be:
  - one **Work History**,
  - one **Participant Barrier**, and
  - three **Contacts**.

- ☐ **Step 22:** Click **PIN Comments** from the **Case Management** navigation toolbar. Record PIN comments summarizing Brittany's Informal Assessment Driver Flow, and select the appropriate **Comment Type**, **Participant Contact** and **Contact Method** fields
  - Ensure PIN comments reflect her current situation, Informal Assessment results, and any decisions and actions taken. Remember, PIN comments are not confidential.

## Job Readiness

Brittany is not sure what type of job she would like. She did enjoy her manufacturing job but also wants to consider completing her accounting degree. She is most interested in working with analytical types of jobs because she enjoys problem solving. To pursue those, she knows furthering her education would be essential. Right now, she wants to avoid full-time work. She has a newborn and still is trying to get Mason on a solid schedule. If she were to look for work hours, during the mid-day would be best. Brittany also wants to be close to home, perhaps 5 miles and/or 30 minutes away.

Brittany's voicemail and email are both set up to receive messages. She does not check her voicemail very often because no one ever leaves her messages. She would need to get into the habit of checking her voicemail.

You and Brittany plan to review the remainder of these questions at a later appointment as she continues with the program.

- ☐ **Step 1:** Click on the **Case Management** navigation toolbar, and click Job Readiness.
- ☐ **Step 2:** Enter Brittany's responses to the **Work Preference** and **Contact Questions**. Click Save with Errors.
- ☐ **Step 3:** Record **PIN Comments** summarizing Brittany's job readiness.
  - Select JOB READINESS/CAREER ASSESSMENT as the **Comment Type**.

You are at the end of Brittany's entries for Initial Assessment.



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

A trainer will review your entries and provide feedback. **Do not** start making entries for Chantelle until a trainer has confirmed Brittany's entries are complete.



# Chantelle

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**Key reminders for Chantelle's entries:**

- If certain information is not provided in the scenario, then it does not apply to Chantelle. If you need more details for certain questions, you can make it up based on her scenario.
- Complete, and submit, the Informal Assessment Driver Flow.
- Enter Job Readiness information for the Work Preferences and Contact Questions.
- Enter PIN comments about Chantelle's Informal Assessment and job readiness information.

You meet with Chantelle in person to complete the Informal Assessment Driver Flow.

Chantelle reads, writes and speaks in English. She does speak Spanish with her Spanish speaking friends.

Chantelle's employment history of the last few years:

- Cashier/Waitress at Pie's in the Oven in Elkhorn, for 13 months, ending two years ago. She earned \$14.00/hour and worked 30 hours a week. She did everything from waitressing, stocking supplies, cooking pies, cleaning, training, and inventory. The responsibilities she enjoyed the most were training new staff, taking inventory, and ordering supplies. She left this job to take the receptionist position.
- Receptionist at Car Toys in Pewaukee, from two years ago up until two months ago. She fell (not at work) and was unable to return to her job, and her employer did not hold her job for her. She worked 36 hours a week. She earned \$16.00/hour and \$16.50/hour by the time the job ended. She really liked this job, as she worked independently and as part of the team. She was responsible for inventory, placing orders, and all the accounts payable and receivable. She tells you that she received positive feedback about the work she had done and only had a couple minor issues with arriving on time due to the bus schedule.

Chantelle is interested in working in an office setting during daytime hours (8-4:30). She likes to have a variety of tasks to do. She enjoys working independently and as part of a team. She would like to work with staff and with customers. Based on her past employment, she feels she has a lot of the skills needed for office/customer service positions and would be open to attending a training or college classes on office administration.

She has a valid driver's license, but uses public transportation. She usually allows at least an hour to get to and from work. Ideally, she would like to find a job that is within walking distance from her home or doesn't involve transferring buses.

Chantelle received her high school diploma from Elkhorn Area High School in June of the year she turned 18. Chantelle always wanted to go to college, and planned to do

just that, but life got in the way. And then, when she was 24, she had her son. At that point, getting and keeping a job made more sense. She enjoyed school and often dreamed of pursuing a career that would include travel.

She rents a two-bedroom upper of a house and pays \$1300/month, which includes utilities, she has lived there for five years.

Chantelle suffered a fall where she broke her right wrist and sprained her left wrist. The cast will stay on for another week and then she'll start physical therapy. She continues to strengthen her left wrist with physical therapy, and she has mobility with her fingers. She can do light keyboarding. She doesn't feel this will impact her ability to participate. She reports no domestic violence issues.

Anthony is a good student and participates in Boys and Girls Club as a participant and student mentor.

Anthony's father, Tyson, has had limited contact with Anthony and Chantelle for over 10 years. Anthony receives \$300 once a month in Child Support.

Chantelle uses a cell phone with voice mail and text messaging. She only uses her first and last name in her message in case her son's school calls or employers try to reach her. She can access her email on her phone and has an old computer at home.

You are at the end of Chantelle's entries for Initial Assessment.



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

A trainer will review your entries and provide feedback.