

Building on Assessment Entry Guide

Table of Contents

Ana	3
Standardized Educational Assessment Tool Results	3
Career Assessment Results	6
Job Readiness	9
Employability Plan Update	10
Brittany	21
Formal Assessment Results	21
Career Assessment Results	22
Job Readiness	22
Informal Assessment Driver Flow	23
Placement	24
Employability Plan Update	24
Chantelle	26

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

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

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 meet with Ana to make updates and changes to her case. You ask what she's accomplished since your last appointment. She reports she set-up formal child care for Elena.

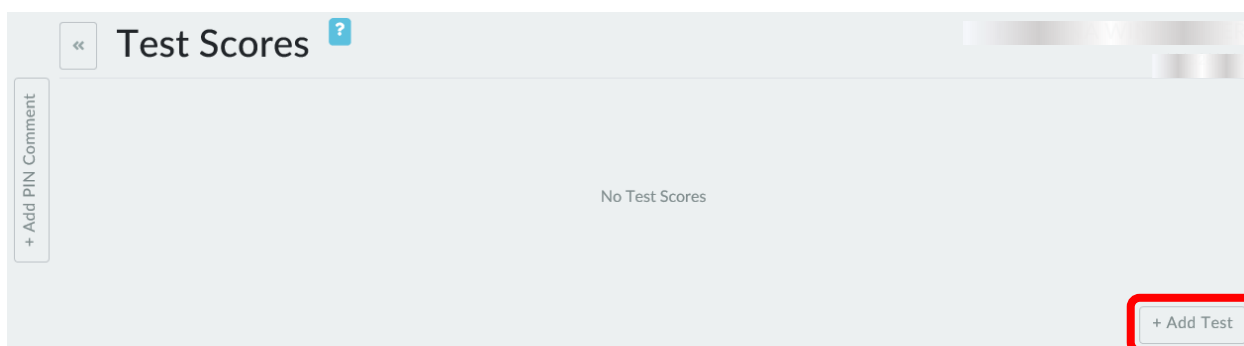
- ☐ **Step 1:** Navigate to the **Child and Youth Supports** page and update to show Elena now has formal child care.

Standardized Educational Assessment Tool Results

Ana says she completed her TABE five days ago. Together, you review her results. She scored 568 in Reading and 580 in Math. Ana was happy with these results as she expected to have a lower reading score. Based on these results, you and Ana decide her goal of obtaining her HSED within six months is still realistic.



- ☐ **Step 1:** From the **Case Management** navigation toolbar, select the Test Scores app.



- ☐ **Step 2:** Click on + Add Test.

Add Test Score ? ✕

Test Type **TABE 9 & 10** ▼ Date Taken **05/14/2020** ✕

	SCALE SCORE	VERSION	GRADE EQUIVALENCY	LEVEL	NRS
Language	/ 999				▼
Reading	/ 999				▼
Mathematics	/ 999				▼

Details

380 characters remaining

Cancel Save

- ☐ **Step 3:** Click on the **Test Type** drop-down to show available choices. Select TABE 9 & 10.
- ☐ **Step 4:** Enter a date five days ago.
- ☐ **Step 5:** Enter the following test scores.
 - **Reading Scale Score 568**
 - **Mathematics Scale Score 580**
- ☐ **Step 6:** Click Save.

Test Scores ?

GED/HSED Prior TABE

TABE 9 & 10 Last Edited by Rachel G. Haase 3/8/21, 8:25 AM

	Scale Score	Version	Grade Equivalency	Level	NRS
03/03/2021					
LANGUAGE	- / 999	...	...	...	...
READING	/// / 999	...	...	...	...
MATHEMATICS	/// / 999	...	...	...	...

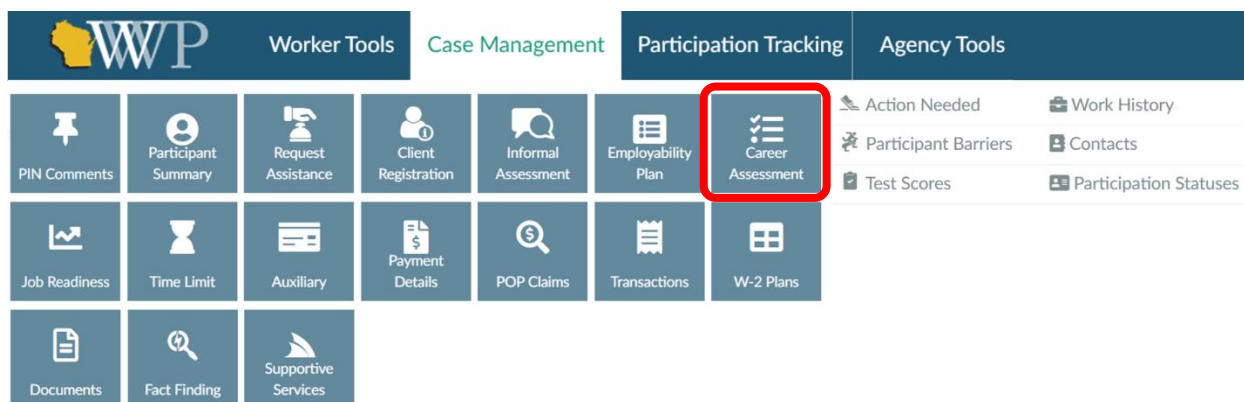
03/03/2021

+ Add PIN Comment + Add Worker Task

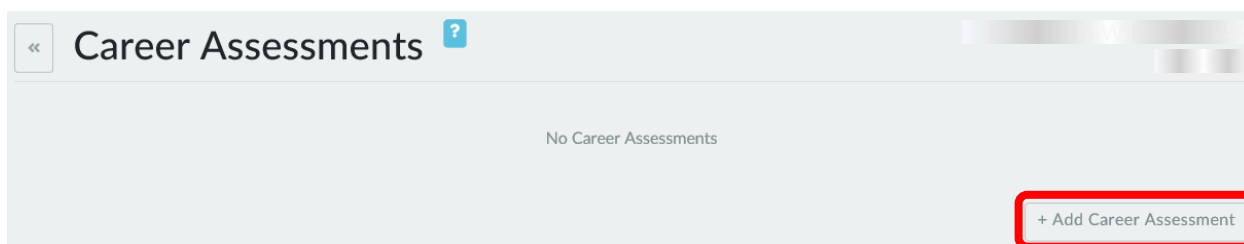
- ☐ **Step 7:** Click + Add PIN Comment.
- ☐ **Step 8:** Record comments related to her standardized education assessment tool results.
 - Select **Comment Type** INFORMAL ASSESSMENT.
 - Select Successful for **Participant Contact** and In-Person for **Contact Method**.
- ☐ **Step 9:** Click Save.

Career Assessment Results

You also review her career assessment results. Ana took the Personal Globe, Work Values, and Work Skills inventories on Career Locker to cover the required the three required elements. Together, you review her results. She works well with others and in team settings, she can manage her time and prioritize work projects, communicates effectively with co-workers and customers, and enjoys explaining processes to others. Ana's results further indicate she values having responsibility or leadership roles, making decisions on her own, and work environments where she feels she has a positive impact on others. She was not surprised at the results, and explored jobs similar to those she has had in the past (cashier, customer support specialist, and sales associate). Ana further explored other related occupations based on her interests. Those included a few different clerical jobs like receptionist, concierge, and data entry clerk. Those types of careers fit with her career goals in customer services and office management. After she obtains her HSED, Ana would like to further her education in the clerical field.



- ☐ **Step 1:** From the **Case Management** navigation toolbar, select **Career Assessment**.



- ☐ **Step 2:** Click + Add Career Assessment.

×
Add Career Assessment
?

Element(s) (Select all that apply.)

Select

Completion Date

MM/DD/YYYY

Assessment Provider

Assessment Tool Used

Assessment Results

No Contact Selected

+

Q

Skill Explorer

Related Occupation(s)

How are the assessment results being applied to the Employability Plan and Activities?

Cancel

Save

- ☐ **Step 3:** For **Element(s)**, select WORK STYLES, SKILLS, and INTERESTS.
- ☐ **Step 4:** Enter a date four days ago.
- ☐ **Step 5:** Enter YOUR AGENCY as the **Assessment Provider**.
- ☐ **Step 6:** Enter CAREER LOCKER as the **Assessment Tool**.
- ☐ **Step 7:** For **Assessment Results** and **Related Occupations**, summarize Ana's results.
 - Be sure to include specific skills, interests, and occupations from the scenario, along with any other relevant information.
- ☐ **Step 8:** For the question "How are the assessment results being applied to the Employability Plan and Activities?" include specific examples of how the assessment results relate to the goals and activities on Ana's employability plan.
 - **Example:** *Ana's goals are directly related to gaining employment in her desired career field. Education and work experience in an office setting are steps in achieving goals.*
- ☐ **Step 9:** Click Save.
- ☐ **Step 10:** From the **Case Management** navigation toolbar, select **Informal Assessment**. Navigate to the **Work History** page.

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

- ☐ **Step 11:** Answer Yes to the question “Have you ever completed a career assessment either online, in a school setting, or through a work program?”
- ☐ **Step 12:** In the **Details** field, enter ANA COMPLETED CAREER LOCKER ASSESSMENT. DETAILS ON CAREER ASSESSMENT PAGE.
- ☐ **Step 13:** Click Save
- ☐ **Step 14:** Click + Add PIN Comment and add comments summarizing Ana’s Career Assessment results.
 - Select **Comment Type** JOB READINESS/CAREER ASSESSMENT.
 - Select Successful for **Participant Contact** and In-Person for **Contact Method**.

Job Readiness

You and Ana also continue to assess her job readiness. Ana's last job was at Kwik Trip. She really liked working with the customers, but had to quit after her hours were switched from first to second shift. Personally, she is proud of getting Associate of the Month two times in one year. Ana identifies her greatest strength as being a loyal employee and always showing up for her shift. She feels she could work on her assertiveness skills.

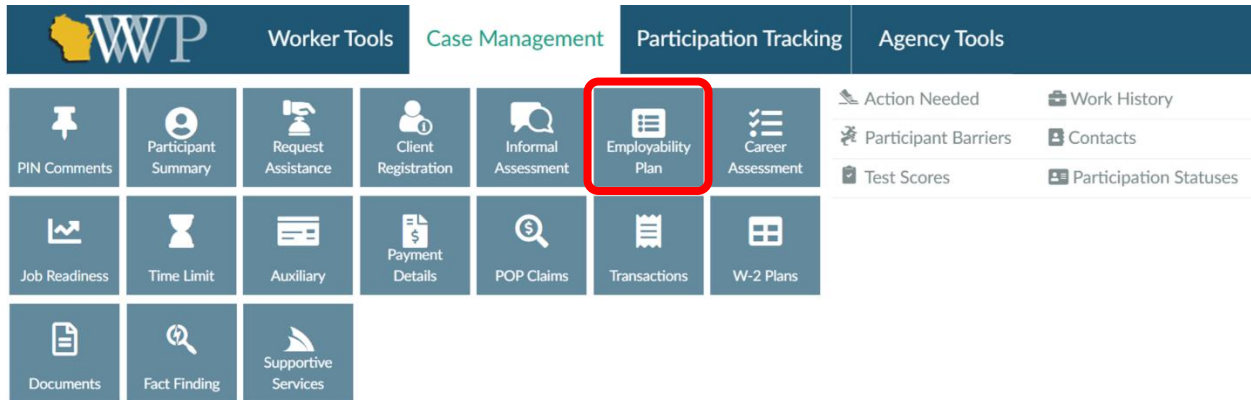
Ana has submitted online applications before and feels comfortable doing so. She has learned some interviewing tips and follow-up tips from the Job Developer and Job Club. Ana does not yet have a resume and is not confident writing cover letters. She would like to work on those. Ana knows she has two references she can use, but needs to think about who she can ask as a third reference. All her identification and important documents are in order.

You and Ana discuss her last interview. It was when she interviewed for her job at Kwik Trip. She states she was nervous, but she feels it obviously went well, as she got the job. Although she has an Instagram account, she never posts anything. She is not concerned about an employer seeing anything. Ana has two different outfits she could wear to job interviews.

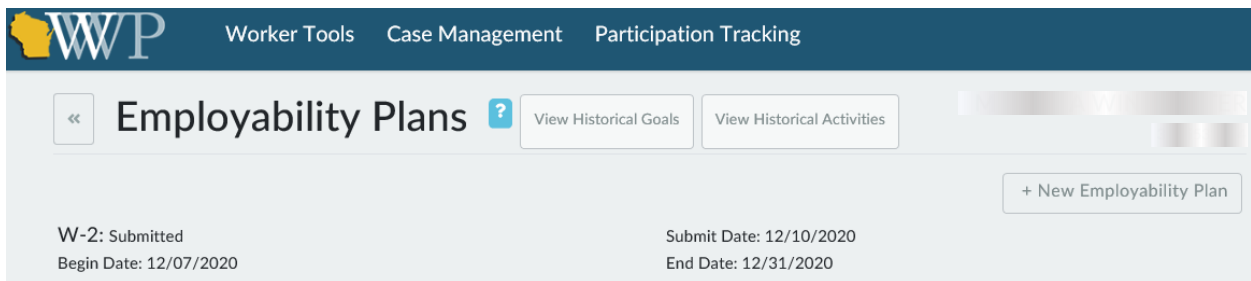
- ☐ **Step 1:** From the **Case Management** navigation toolbar, select **Job Readiness**.
- ☐ **Step 2:** Complete the **History Questions**, **Application Questions**, and **Interview Questions** fields.
 - Refer to the scenario. Include specific details.
 - Ana has no action needed items.
- ☐ **Step 3:** Click Save.
 - The **Job Readiness** page now should be saved without errors.
- ☐ **Step 4:** Click + Add PIN Comment, and add comments summarizing Ana's job readiness.
 - Select **Comment Type** JOB READINESS/CAREER ASSESSMENT.
 - Select Successful for **Participant Contact** and In-Person for **Contact Method**.

Employability Plan Update

With the results of her recent assessments and completion of some activities, Ana and you decide to make updates to her EP. You begin with updating her goals.



- ☐ **Step 1:** Navigate to the **Employability Plans** page via the **Case Management** navigation toolbar.



- ☐ **Step 2:** Click the + New Employment Plan button to initiate the Employment Plan driver flow and create a subsequent EP.
- ☐ **Step 3:** Enter the **EP Begin Date** as today's date, and the **EP End Date** as one month from today. Select No for **Create EP Without Activities?**
- ☐ **Step 4:** Click + Continue to go to the next page.
- **Note:** If you entered participation for activities on or after the begin date, you will get a warning message. Click Continue with Warning.

Goals

Goal Type:	Begin Date:
Primary Employment Goal	03/17/2021
Goal Name:	Goal Description:
Receptionist	likes working with

- ☐ **Step 5:** Click on Ana's **Primary Employment Goal** of **Receptionist** to edit this goal.

Goal Steps

Step

Complete Career Cruising career assessment by next appointment.

☐ Completed?

Step

Cancel

Save

- ☐ **Step 6:** Click **Completed?** for the **Goal Step** "Complete Career Locker career assessment by next appointment."
- ☐ **Step 7:** Click Save.
- ☐ **Step 8:** Click on Ana's **Other Employment Goal** of **Obtain HSED**.
- ☐ **Step 9:** Click **Completed?** for the **Goal Step** "Take the test for Adult Basic Education (TABE) and review results with FEP at next appointment."
- ☐ **Step 10:** Click Save.
- ☐ **Step 11:** Click + Continue to save and navigate to the **Employments** page.

- ☐ **Step 12:** Click + Continue to save and navigate to the **Elapsed Activities** page.
- Your TABE activity may or may not be elapsed, depending on the date you entered the activity and the date you are creating a new EP.
 - If the TABE activity is elapsed, select A – SUCCESSFULLY COMPLETED.

Activity:	Start Date:
Career Planning & Counseling	11/17/2023
Activity Description:	Planned End Date:
COMPLETE THE TEST OF ADULT BASIC EDUCATION (TABE)	11/17/2023
Completion Reason:	
<div style="border: 1px solid #ccc; padding: 2px;"> A - Successfully completed ▼ </div>	

- ☐ **Step 13:** Click + Continue to save and navigate to the **Activities** page.

Since Ana has completed the Career Locker career assessment and TABE, you end these activities.

Activities

Activity:	Planned End Date:
Career Planning & Counseling	12/25/2020
Start Date:	Activity Description:
12/11/2020	Complete Career Cruising career assessments

- ☐ **Step 14:** Click on the “Complete Career Locker career assessments” activity to end it.

☒ End Activity?

Activity Completion


Completion Reason
A - Successfully completed ▼

Actual End Date
12/07/2020

View Calendar

Cancel Save

- ☐ **Step 15:** Scroll to the bottom of the page and click the **End Activity?** checkbox.
- ☐ **Step 16:** Select A – SUCCESSFULLY COMPLETED from the **Completion Reason** drop down.
- ☐ **Step 17:** Enter yesterday’s date for the **Actual End Date**.
- ☐ **Step 18:** Click Save.
- ☐ **Step 19:** Click on the “Complete the Test of Adult Basic Education (TABE)” activity.
 - If the TABE activity elapsed, then you already entered this as complete. Skip to step 20.
 - If it hasn’t started yet, click the Cancel button to return to the **Activities** page. Click the Delete button to remove it from the EP. Click on Delete Activity in the pop-up.

Activity:	Planned End Date:
Career Planning & Counseling	02/06/2024
Start Date:	Activity Description:
02/06/2024	Complete (TABE) Test of Adult Basic Education 

- If it has not elapsed and has started, repeat steps 15-18.

You ask how the other activities are going. Ana tells you that she attended the Work Experience orientation session, and it went well. She feels good about starting the work experience activity, especially now that she has child care arranged.

- ☐ **Step 20:** Click on the “Attend Work Experience Orientation to Prepare for an Office-Related Worksite” activity.
- ☐ **Step 21:** Repeat steps 15-18.

- If it hasn't started yet, click the Cancel button to return to the **Activities** page, and click the Delete button to remove it.
- ☐ **Step 22:** Click on the "Research options for back up child care" activity.
- ☐ **Step 23:** Repeat steps 15-18.


Next, you and Ana decide on new activities based on her assessment results. Based on your email conversation, you plan on removing Job Club from Ana's EP. You suggest the GCF Global website and starting with the business communication classes, which could help with work in an office setting.

- ☐ **Step 24:** Click on the "Attend Job Club" activity and end it.
- ☐ **Step 25:** Click + Add Activity.
- ☐ **Step 26:** Select MO – JOB READINESS/MOTIVATION as the **Activity**
- ☐ **Step 27:** Enter COMPLETE THE BUSINESS COMMUNICATION COURSES THROUGH GCF GLOBAL THAT FOCUS ON COMMUNICATION BASICS AND BUSINESS WRITING as the **Activity Description**.
- ☐ **Step 28:** The **Location** is Off-site. Enter your HOME for the **Business Name**.
- ☐ **Step 29:** Enter CREATE AN ACCOUNT AT [HTTPS://EDU.GCFGLOBAL.ORG/EN/](https://edu.gcfglobal.org/en/). MOVE ONTO THE MICROSOFT OFFICE COURSES WHEN FINISHED WITH BUSINESS COMMUNICATION for **Additional Information**.
- ☐ **Step 30:** Scroll down to the **Activity Scheduler** section. Enter a **Start Date** of tomorrow. Check the RECURRING? checkbox.
- ☐ **Step 31:** Select WEEKLY for the **Frequency** and TUESDAY as the **Days (Select all that apply.)**.
- ☐ **Step 32:** Enter a **Planned End Date** of one month from today.
- ☐ **Step 33:** For **Hours Per Day**, enter 3.0. For a **Begin Time**, enter 8:00 AM, and 11:00 AM for an **End Time**.
- ☐ **Step 34:** Click Save.

Ana thinks she will reach her typing goal within the next week. She also says she isn't getting much out of the Job Readiness Essentials workshop. She's willing to attend the next session because it is supposed to be on assertiveness, but then would prefer to focus on something else.

- ☐ **Step 35:** Click on the “Complete online typing lessons” activity.

Activity Scheduler

Start Date: 12/20/2023 ☐ Recurring? 

Frequency: Weekly Days (Select all that apply.): Monday, Wednesday

Planned End Date: 01/20/2024

- ☐ **Step 36:** Change the **Planned End Date** to six calendar days after today and click Save.
- **Note:** When layering activities to end/start later in an EP period on a real case, you use the actual date of the last time this activity would occur based on the activity schedule.
- ☐ **Step 37:** Click on the “Attend Job Readiness Essentials workshops” activity.
- ☐ **Step 38:** Repeat step 36.
- **Note:** On a real case, you use the actual date of the last time this activity would occur based on the activity schedule.

Ana will register for and begin HSED classes at the local technical college. She is excited to start working toward this goal. You explain to Ana that meeting regularly with the Education Navigator can help her navigate the HSED exam process and help keep her on track. She likes this idea.

- ☐ **Step 39:** Click + Add Activity.
- ☐ **Step 40:** Select HE – HSE (HIGH SCHOOL EQUIVALENCY DIPLOMA) as the **Activity**.
- ☐ **Step 41:** Enter REGISTER FOR HSED COURSES as the **Activity Description**.
- ☐ **Step 42:** The **Location** is Off-site. Enter your local Technical College’s information for the **Business Name**, **Location**, **Street Address**, **Zip**, and **Phone Number**.
- ☐ **Step 43:** Scroll down to the **Activity Scheduler** section. Enter Friday’s date as the **Start Date**. Do not check the RECURRING? checkbox.

- ☐ **Step 44:** For **Hours Per Day**, enter 1.0.
- ☐ **Step 45:** Enter a **Begin Time** of 11:30 AM and an **End Time** of 12:30 PM.
- ☐ **Step 46:** Click Save.
- ☐ **Step 47:** Select CE – CAREER PLANNING AND COUNSELING as the **Activity**.
- ☐ **Step 48:** Enter MEET WITH EDUCATION NAVIGATOR TO DISCUSS PROGRESS TOWARD HSED AND TO GET ASSISTANCE IN PREPARING FOR YOUR HSED TESTS as the **Activity Description**.
- ☐ **Step 49:** The **Location** is On-Site. Enter your agency's information for the **Business Name, Location, Street Address, Zip, and Phone Number**.
- ☐ **Step 50:** Select Edna Navigator as the **Activity Contact**.
- ☐ **Step 51:** Scroll down to the **Activity Scheduler** section. Enter next Friday's date for the **Start Date**. Check the RECURRING? checkbox.
- ☐ **Step 52:** Select WEEKLY for the **Frequency** and FRIDAY as the **Days (Select all that apply.)**.
- ☐ **Step 53:** Enter a **Planned End Date** of one month from today.
- ☐ **Step 54:** Enter 1.0 for **Hours Per Day**, 11:30 AM for **Begin Time**, and 12:30 PM for **End Time**.
- ☐ **Step 55:** Click Save.
- ☐ **Step 56:** Click + Add Activity.
- ☐ **Step 57:** Select HE – HSE (HIGH SCHOOL EQUIVALENCY DIPLOMA) as the **Activity**.
- ☐ **Step 58:** Enter ATTEND HSED PREP CLASSES as the **Activity Description**.
- ☐ **Step 59:** The **Location** is Off-site. Enter your local Technical College's information for the **Business Name, Location, Street Address, Zip, and Phone Number**.
- ☐ **Step 60:** Scroll down to the **Activity Scheduler** section. Enter a **Start Date** of one week from today. Check the RECURRING? checkbox.
 - **Note:** *On a real case, you use the actual date of the first time this activity would occur based on the activity schedule.*

- ☐ **Step 61:** Select WEEKLY for the **Frequency** and MONDAY and WEDNESDAY as the **Days (Select all that apply.)**.
- ☐ **Step 62:** Enter a **Planned End Date** of one month from today.
- ☐ **Step 63:** For **Hours Per Day**, enter 2.5, and 10:00 AM as the **Begin Time** with 12:30 PM as an **End Time**.
- ☐ **Step 64:** Click Save.
- ☐ **Step 65:** Click + Add Activity.
- ☐ **Step 66:** Select HE – HSE (HIGH SCHOOL EQUIVALENCY DIPLOMA) as the **Activity**.
- ☐ **Step 67:** Enter INDIVIDUAL STUDY TIME FOR HSED PREP CLASSES as the **Activity Description**.
- ☐ **Step 68:** The **Location** is Off-site. In the **Business Name** field, type HOME, LIBRARY, TECHNICAL COLLEGE.
- ☐ **Step 69:** Scroll down to the **Activity Scheduler** section. Enter a **Start Date** of one week from today. Check the RECURRING? checkbox.
- ☐ **Step 70:** Select WEEKLY for the **Frequency** and THURSDAY as the **Days (Select all that apply.)**.
- ☐ **Step 71:** Enter a **Planned End Date** of one month from today.
- ☐ **Step 72:** For **Hours Per Day**, enter 3.0.
- ☐ **Step 73:** Click Save.

Ana agrees to work experience at Our Neighbors, a local non-profit that provides community outreach activities. This is a clerical position, where she will answer the phone, receive and sort mail, and do some scheduling.


- ☐ **Step 74:** Click + Add Activity.
- ☐ **Step 75:** Select WE – WORK EXPERIENCE as the **Activity**.
- ☐ **Step 76:** Enter COMPLETE WORK EXPERIENCE AT OUR NEIGHBORS. WORK DUTIES FOCUS ON BASIC OFFICE SKILLS as the **Activity Description**.
- ☐ **Step 77:** The **Location** is Off-site. Enter OUR NEIGHBORS for the **Business Name**. Make up a **Location, Street Address, Zip, and Phone Number**.

- ☐ **Step 78:** Ana has a worksite supervisor who is the **Activity Contact**. Click the + button to add her as a contact. (Be sure to click the + button and not the + **Add Contact** button, as this button adds additional contacts.)
- ☐ **Step 79:** Select WORK SITE PROVIDER from the **Contact Title** dropdown.
- ☐ **Step 80:** Enter SHONDA SUPERVISOR as the **Name**, SHONDAS@OURNEIGHBORS.COM as the **Email**, and 920-555-1111 as the **Phone**.
- ☐ **Step 81:** Ana signs a Release of Information (ROI) for you to communicate with the worksite supervisor. Check the ROI SIGNED box and enter today's date.
- ☐ **Step 82:** Click Save.
- ☐ **Step 83:** Scroll down to the **Activity Scheduler** section. Enter today's date for the **Start Date**. Check the RECURRING? checkbox.
- ☐ **Step 84:** Select DAILY – EVERY WEEKDAY for the **Frequency**.
- ☐ **Step 85:** Enter a **Planned End Date** of one month from today.
- ☐ **Step 86:** Enter 3.0 for **Hours Per Day**, 1:00 PM for **Begin Time**, and 4:00 PM for **End Time**.
- ☐ **Step 87:** Click Save.

Ana mentions that with the Job Developers encouragement and guidance, she applied for some clerical jobs. She's called the employers to follow up but has not gotten an interview yet. Ana has found the Job Developer very helpful and would like to continue to meet with them. The Job Developer helped her feel more confident when completing applications and talking to employers. She requests that you lower her job search to 10 hours a week.

- ☐ **Step 88:** Click on the "Meet with Job Developer to get assistance navigating the local labor market" activity.
- ☐ **Step 89:** Change the **Planned End Date** to a date one month from today and click Save.
- ☐ **Step 90:** Click on the "Complete independent job search" activity.

Activity Scheduler

Start Date	12/20/2023	<input type="checkbox"/> Recurring?	
Frequency	Daily - Every Week ▼		
Planned End Date	01/20/2024		
Hours Per Day	2.0		

- ☐ **Step 91:** Change the **Planned End Date** to a date one month from today and change the **Hours Per Day** to 2.0.
- ☐ **Step 92:** Click Save.
- ☐ **Step 93:** Click + Exit to go to the **Employability Plan** page summary.
- ☐ **Step 94:** Click the View Calendar button to review a calendar of Ana's assigned activities.
- ☐ **Step 95:** Click the Exit button to navigate back to the **Employability Plan Summary** page.



Do **not** submit Ana's EP. A trainer will tell you when to submit the EP. Continue to the next step.

Based on the activities you and Ana have agreed on, she will need transportation assistance to complete her W-2 activities.

- ☐ **Step 96:** Navigate to the **Supportive Services** page and enter the transportation assistance you provide Ana
- ☐ **Step 97:** Navigate to the **PIN Comments** page.
- ☐ **Step 98:** Enter comments that capture the rest of your appointment with Ana, including the discussion on her progress, changes to her Employability Plan, and the supportive services you provide.
 - Select the EMPLOYABILITY PLAN/ACTIVITY ASSIGNMENT and SUPPORTIVE SERVICES **Comment Type**.
 - Select Successful for **Participant Contact** and In-Person for **Contact Method**.
 - **Example:** *We updated Ana's EP at today's appointment. Prior to today's appointment, Ana completed the TABE, her Career Assessment and work experience orientation, and set up child*

care. I marked the TABE-related goal step complete for her Other Program Goal, and the Career Assessment goal step complete for her Primary Employment Goal. I ended the TABE, career assessment, work experience orientation, and child care activities. Ana applied for several clerical positions and called the employers to follow up on her applications, but has not gotten an interview yet. She will continue to work with the Job Developer 3 hours a week, with an added focus of creating a resume and cover letter. Ana no longer wants to attend Job Club, so we ended that activity and added completing GCF Global classes focusing on business communication. She'll be completing those classes 3 hours a week. Additionally, she will continue to look for and apply to positions, but we reduced this to 10 hours a week at Ana's request. Ana thinks that she will reach her typing goal within the next week. She also says she isn't getting much out of Job Readiness Essentials. She wants to attend the next session, which focus on assertiveness, and then she wants the activity to end. I updated both planned end dates accordingly. The results of Ana's TABE show she is ready to register for HSED classes. She is assigned 1 hour of registering for classes this week. Starting next week, she will attend HSED classes 5 hours a week, study for classes 3 hours a week, and meet with the Education Navigator to discuss her progress toward her HSED 1 hour a week. Ana's career assessments aligned with her Primary Employment Goal of a receptionist position. She does not have experience in this field, so I assigned her 15 hours a week of work experience at Our Neighbors to gain clerical experience. I provided Ana gas vouchers so she can complete her assigned activities.

You have completed Building on Assessment for Ana.



- Send an email to PTTTrainingSupp@wisconsin.gov.
- Subject Line: **Building on Assessment Ana** and Ana's PIN.

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

Brittany

Brittany's CMC placement is ending due to Ella reaching 8 weeks of age. You meet with her in-person today to update her case.

Formal Assessment Results

Brittany returns her Mental Health Report completed by Dr. Jane Jones. It indicates that Brittany is expected to meet with Dr. Jones weekly. Her mental health diagnosis manifests through sleep disturbance, decreased energy, and social withdrawal. These symptoms are expected to continue for six months to a year. However, Dr. Jones indicates that Brittany can participate in employment activities as long as she has accommodations for fatigue and stress. She recommends re-assessment in six months.

- ☐ **Step 1:** Navigate to Brittany's Participant Barriers app via the **Case Management** navigation toolbar. Click the edit button to open her barrier.

Referral Date: 05/15/2020 ☐ Referral Declined Details

Assessment Date: 05/20/2020 ☐ Assessment Not Completed Details

How long will the symptoms likely last? [dropdown] Recommended Reassessment Date: MM/DD/YYYY ☐ Not Needed

Details

Hours the individual can participate: [dropdown] per [dropdown] Details

No Contact Selected + 🔍

- ☐ **Step 2:** Enter the date the assessment was completed in the **Assessment Date** field.
- ☐ **Step 3:** Add **Formal Assessment** information, including the hours she can participate and additional details.
 - Use the Magnifying Glass search feature to select Brittany's treatment provider from the list of contacts.

- ☐ **Step 4:** Add **Accommodations** for FATIGUE/WEAKNESS and STRESS MANAGEMENT.
 - If you're not sure what accommodations to provide, check out the Job Accommodation Network, askJAN.org, for ideas.
- ☐ **Step 5:** Click Save and Exit.
- ☐ **Step 6:** From this page, click + Add PIN Comment. Enter comments that reflect Brittany's formal assessment information.
 - Remember, PIN comments are not confidential.
 - Select **Comment Type** GENERAL. Select Successful for **Participant Contact** and In-Person for **Contact Method**. WWP automatically enters today's date as the **Contact Date**.

Career Assessment Results

Together, you review Brittany's career assessment results. She completed the Personal Globe, Work Values, and Work Skills inventories of the Career Locker assessment. The results indicate that she is interested in working with data and numbers. Brittany enjoys working independently and on one task at a time. Based on these results, potential career matches included bank teller, personal banker, and accounts receivable and payable clerk. This fits with her past education experience in accounting. She would like to finish that degree. Based on her work history, past experience, and skills, some related occupations included machinist, assembly production, and material handler. You and Brittany use these potential career matches and related occupations to examine her goals and develop potential career paths.

- ☐ **Step 1:** Record her career assessment results on the **Career Assessment** page.
 - Be specific on how you are using these assessment results in her goals and activities.
- ☐ **Step 2:** Click + Add PIN Comment and summarize her career assessment.

Job Readiness

Together, you continue to assess her job readiness. Brittany enjoyed her last job and left due to caring for her son. When she was able to work, she felt she was good at her job. In fact, her supervisor had spoken with her about considering a lead position because she is good with organizing project details. Brittany feels her organizational skills are her greatest strength and felt very proud that she was considered for a lead position. However, Brittany knows that attendance is really important. She wants to be reliable but is unsure how that can work right now.

Brittany feels ok when it comes to submitting online forms but does not have a lot of experience with online applications. She does not have a resume or cover letter and does not know where to begin in developing one. Brittany always has completed applications without having to submit a resume. Although she has personal references, she does not have professional references and is unsure who to ask. All her documents are in order.

Brittany does not really remember her last interview, but she got the job. Brittany does use Facebook frequently. She does not think there is anything on there that would be a concern, but she does not know for sure. She does have one nicer outfit that she could wear for an interview but is unsure if it still fits. You'll provide her with a Goodwill voucher to get an interview outfit at the end of the appointment.

- ☐ **Step 1:** Navigate to Brittany's **Job Readiness** page.
- ☐ **Step 2:** Record Brittany's responses to the **History Questions, Application Questions, and Interview Questions.**
- ☐ **Step 3:** Click Save.
- ☐ **Step 4:** You are now on the **Participant Summary** page. From this page, click + Add PIN Comment.
- ☐ **Step 5:** Enter comments summarizing Brittany's job readiness.

Informal Assessment Driver Flow

Because Brittany is alone at her appointment today, you determine it is safe to ask her the Domestic Violence questions. She agrees to answer the questions, and answers No to every question.

You ask Brittany about the Need to Care for Disabled Family Member form you provided at her initial Informal Assessment. She states that she gave it to Mason's doctor at his last appointment, but the doctor has not yet completed it. She states she will pick it up later this afternoon and drop it off to you.

- ☐ **Step 1:** Complete the Informal Assessment driver flow by clicking the New Assessment button.
 - Be sure to Save each page and check the No Action Need button as needed
 - Update the **Work History** page to indicate that Brittany has completed a career assessment.
 - On the **Participant Barriers** page, select Yes to **Display Next Section?**, and answer the Domestic Violence questions.

Submit it when finished.

- ☐ **Step 2:** Click + Add PIN Comment and add comments that summarize Brittany's new assessment information. Select **Comment Type** INFORMAL ASSESSMENT. Select Successful for **Participant Contact** and In-Person for **Contact Method**.

Placement

Based on the Formal and Informal Assessment results, you determine that Brittany is appropriate for a W-2 T placement due to her and her son's barriers.

- ☐ **Step 1:** Update Brittany's placement on the **W-2 Placement** page.
- ☐ **Step 2:** Enter comments on the **Case Comments** page indicating the placement change.
- ☐ **Step 3:** Navigate to Brittany's **PIN Comments** page and add a comment regarding her placement change. Include the reasoning behind your placement decision.

Employability Plan Update

You and Brittany update her EP to reflect her most recent assessment information and accommodations. She should be participating in as many hours as appropriate, up to 40 hours. These activities could include employment search, work experience, education and training, job skills training, etc. Be sure to include getting the Need to Care for a Disabled Family Member form completed as an assigned activity. Remember, Brittany completed her Formal Assessment. You must end that activity. Ending that activity causes her Formal Assessment Pending Participation Status to end.

- ☐ **Step 1:** Navigate to Brittany's **Employability Plans** page. Create a new EP for Brittany, this should be no longer than 30 days.
- ☐ **Step 2:** Review Brittany's goals and record any new goals.
 - Remember to check any completed **Goal Steps** as Completed?
- ☐ **Step 3:** End Brittany's Elapsed Activity. This includes her Mental Health Assessment activity which she successfully completed.
- ☐ **Step 4:** Update her activities to reflect her current situation and level of participation.
 - Update the **Planned End Date** to match the EP End Date, and/or **Hours** of activities she is continuing.
 - Add new activities as needed, including getting the Need to Care for a Disabled Family Member form completed.



Do **not** submit Brittany's EP. A trainer will tell you when to submit the EP. Continue on to the next step.

Brittany feels she could use some new interview clothing. Since she is not sure her outfit will fit. You provide her with a \$25 Goodwill Voucher for interview clothing. She will also need a bus pass to complete her W-2 activities.

- ☐ **Step 5:** Navigate to the **Supportive Services** page and add the supportive services you provide.
- ☐ **Step 6:** Document the changes to Brittany's EP and the supportive services you provide in **PIN Comments**.
 - Be sure to include that her Participation Status ended and the reasoning behind the changes to her EP.

You are at the end of Brittany's entries for Building on Assessments.



- Send an email to PTTTrainingSupp@wisconsin.gov.
- Subject Line: **Building on 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

Key reminders for Chantelle entries:

- If you need more details for certain questions, you can make it up based on her scenario.
- Enter results of the TABE tool and Career Assessment.
- Enter Job Readiness information for History, Application, and Interview questions.
- Review her EP and make updates to goals and activities as needed. Remember to send in the EP for a review before you submit it.
- Enter PIN comments.
- Enter appropriate supportive services.

You meet with Chantelle in-person. You review Chantelle's TABE scores with her. She scored 522 in Reading, 570 in Math, and 548 in Language. Based on these results, she could be ready to pursue a technical college degree/program for Office Administration. However, she states she wants to continue looking for a job for now rather than pursue a degree.

You move on to reviewing the Career Locker Career Assessment results. The results show that Chantelle likes working with people in a positive and cooperative environment, while also being able to work independently. An office/administrative support work setting would allow her to use her organizational and problem-solving skills. This assessment evaluates Chantelle's work styles, skills and interest. Chantelle agrees with the assessment results.

You remind Chantelle that you have some job readiness questions to ask her before you two talk about her EP. As you go through the Job Readiness page, she tells you that she is comfortable submitting job applications online, she has a resume, cover letter, and a letter of recommendation from her last employer. She has a couple of friends she could use as personal references.

In her last job, she was responsible for answering questions from customers and doing general office support work. Chantelle prides herself on completing assignments on time and building friendly relationships with customers, which are two of her strengths.

Chantelle is very confident in her interview skills and got the last two jobs she interviewed for. She isn't worried about what is on her social media account because she only makes appropriate posts. She also mentions that she needs to update some of her work clothes so that they are appropriate for an office setting.

Chantelle's cast is off, and she began physical therapy. She has a five-pound weight limit for one month. Therapy is going well, and she feels ready to take on more to help her reach her goals.

Supportive services continue as needed.

You are at the end of Chantelle's entries for Building on Assessments.



- Send an email to PTTTrainingSupp@wisconsin.gov.
- Subject Line: ***Building on Assessment - Chantelle*** and Chantelle's PIN.

A trainer will review your entries and provide feedback.