

Employment Entry Guide

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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

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 are meeting with Ana in person because she has gotten a job. She provides you with the employment verification, showing she accepted a job as an entry-level lunch room aide at the local elementary school. She will be working Tuesdays, Wednesdays, and Thursdays from 8:45 am to 2:15 pm, and is earning \$14.00 an hour. She will be paid weekly and will receive her first paycheck in two weeks. The job does not offer benefits. She is very excited for this job. It's during the time Elena is in school, so she won't have to worry about childcare. It's not what she thought she would be doing, but she recognizes the potential for career advancement with the school. You complete a new Informal Assessment and add her new job in WWP.

Informal Assessment

- ☐ **Step 1:** Navigate to Ana's **Informal Assessment Summary** page and click New Assessment.
- ☐ **Step 2:** Review Ana's Informal Assessment information on each page, making updates as needed.

Work History

Last Edited by kechappa
5/19/20, 3:30 PM

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.)

Looking for Work / No Work Available

Nobody ever calls me back for an interview.

| | | | | | |
|--|--|---|--------------|--|--|
| | Cashier Kwik Trip Platteville WI | 02/04/2018-----02/04/2020 35 hr/week | \$10.25/Hour | | |
| | Cashier Walgreens Platteville WI | 08/04/2015-----05/04/2016 30 hr/week | \$9.00/Hour | | |

+ Add Work History

- ☐ **Step 3:** On the **Work History** page, indicate Ana's employment status as Part-Time.
- ☐ **Step 4:** Click + Add Work History.
- ☐ **Step 5:** Enter UNSUBSIDIZED as the **Job Type**, TODAY'S DATE as the **Begin Date**, and indicate that she is currently employed.
- ☐ **Step 6:** Enter LUNCH ROOM AIDE as the **Position** and the **Company** and **Location** for your local elementary school.
- ☐ **Step 7:** **Job Duties** include: SETTING UP THE LUNCH ROOM AND SERVING AREA, MONITORING STUDENTS DURING THE LUNCH HOUR, TAKE DOWN OF THE LUNCH ROOM AND SERVING AREA.
- ☐ **Step 8:** Enter her **Expected Schedule** as TUESDAY THROUGH THURSDAY, 8:45AM-2:15PM.
- ☐ **Step 9:** Select None of the Above for **Benefits Offered**.
- ☐ **Step 10:** Select Independent Job Search for **How was this job found?**
- ☐ **Step 11:** Select Hourly as the **Pay Type**, and enter 15 for the **Avg Weekly Hours**. Enter the **Pay Rate** as \$14.00 per Hour.
- ☐ **Step 12:** Click Save and Exit. WWP displays messages about updating the EP. Click Save and Exit again.
- ☐ **Step 13:** Click + Continue

During the Informal Assessment, Ana tells you that she passed two HSED tests on Monday. She scored 155 on the Language test and 145 on the Math test.

Are you working towards a GED or HSED?

Yes

No

No Test Scores

+

Information about ABE/ASE and ESL/ELL test scores can be found in the Test Scores app

- ☐ **Step 14:** On the **Education History** page, indicate that she is working toward her HSED. Select the + button to add Test Scores.

Add Test Score

Test Type

GED/HSED

Date Taken

05/18/2020

| | SCORE | PASS/FAIL |
|----------------|-----------|-----------|
| Language | 155 / 200 | Pass |
| Mathematics | 145 / 200 | Pass |
| Science | / 200 | |
| Social Studies | / 200 | |
| Civics | ... | |
| Health | ... | |
| Details | | |

- ☐ **Step 15:** Enter MONDAY'S DATE in the **Date Taken** field.
- ☐ **Step 16:** Enter 155 as her **Language** score. Indicate that she passed.
- ☐ **Step 17:** Enter 145 as her **Mathematics** score. Indicate that she passed.
- ☐ **Step 18:** Click Save.
- ☐ **Step 19:** Click + Continue.
- ☐ **Step 20:** Review the remaining pages.
- ☐ **Step 21:** Submit the Informal Assessment.

Ana wants to continue looking for other employment opportunities, as this current job is only for the school year, and she needs employment that is year-round. With help from the Job Developer, she has a current resume and has been working on cover letter writing. Both are current, and she feels more confident with her skills. You update the Job Readiness page.

- ☐ **Step 22:** On the **Job Readiness** page, update Ana's response to the **Application Question** concerning her resume and cover letter. Click Save.
- ☐ **Step 23:** Enter PIN comments to indicate you completed the Informal Assessment driver flow, describe Ana's new job, and the HSED tests she completed.
 - **Comment Types** are INFORMAL ASSESSMENT, and EMPLOYMENT.
 - **Example:** *Met with Ana in person today. She got a part-time job at Clay Lamberton Elementary School as a Lunch Room Aide doing lunch room set up/take down and serving. She'll be working 15 hours a week (Tuesday through Thursday 8:45-2:15) and earning \$14 an hour. Ana is excited about this job because the hours work well for Elena's childcare. The position is not what she thought she'd be doing, but she knows there is room for potential advancement. I completed a new informal assessment with her. Ana also passed her first set of HSED tests on Monday. She scored 155 in Language and 145 in Math. Additionally, she now has a resume/cover letter.*

Employment in CWW

Next, you add her new job in CWW.

- ☐ **Step 1:** Navigate to Ana's case in CWW.

Employment Gatepost Cancel Reset

Effective Period
Last Updated: 05/15/2020

Questions

* Is anyone in your household currently employed or on strike or anyone recently been employed (including goods / free rent in return for work (inkind income), OJT, etc)? Y - Yes

* Has anyone in your household recently refused employment, lost employment, or voluntarily reduced work hours? N - No

* Is anyone in your household currently self-employed, (such as farming, babysitting, etc) or has anyone had self-employment in the last 4 months? N - No

- ☐ **Step 2:** On the **Employment Gatepost** page, answer Y-YES to the question, "Is anyone in your household currently employed or on strike or anyone recently been employed?"

- ☐ **Step 3:** Click Next.

Employment Cancel Reset

Employment Information

Effective Period
* Begin Month: 05 / 2020 End Month: MM / YYYY Last Updated:
Delete Reason:

Employer Information

* Individual: 24F Pl Sequence: 0
SSN: 0
WI Employer Number: FEIN:
* Employer Name: Riverview Elementary School * FDSH Wage Lookup:
Address: 526 S Water St
City: Wautoma State: WI - WISCONSIN
ZIP: 54982 - Phone: 920 787 5492
Fax:

- ☐ **Step 4:** Because this is new employment, first determine the **Begin Month**.
- **Note:** This is the month in which she receives her first paycheck (two weeks from today).
- ☐ **Step 5:** Enter the **Begin Month**.

- ☐ **Step 6:** Select the **Individual**.
- ☐ **Step 7:** Enter all fields related to **Employer Information**.

Employment Description

Employee Type:

Job Title for Health Insurance:

Employment Type: R - REGULAR EMPLOYMENT

Begin Date: 05 / 15 / 2020

First Pay Check Date: 05 / 29 / 2020

Employment Ended?: No

Verification: NQ - NOT QUESTIONABLE

Verification: AF - AGENCY FORM

Verification:

Verification:

Employment End Date: MM / DD / YYYY

Date Of Last Paycheck: MM / DD / YYYY

Strike Information

On Strike?: No

Strike Begin Date: MM / DD / YYYY

Strike End Date: MM / DD / YYYY

Verification:

Verification:

- ☐ **Step 8:** Enter the **Employment Type** of R – REGULAR EMPLOYMENT. **Verification** defaults to NQ – NOT QUESTIONABLE, and that is fine.
- ☐ **Step 9:** Enter the **Begin Date**, TODAY’S DATE. **Verification** is AF- AGENCY FORM.
- ☐ **Step 10:** Enter the **Date of First Paycheck**, TWO WEEKS FROM TODAY.
- ☐ **Step 11:** Enter NO for “Employment Ended?” and “On Strike”.

Detailed Wage Information

Pay Frequency

Pay Frequency: W - WEEKLY

Detailed Wage Information

Rate Per Hour: \$.

Average Hours Per Pay Period:

Total Amount Per Pay Period: \$.

Wage Type:

Verification:

Delete: ☐

Reset

Add

| Rate Per Hour | Wage Type | Average Hours Per Pay Period | Verification | Total Amount Per Pay Period | Delete |
|---------------|-------------------|------------------------------|------------------|-----------------------------|--------|
| 14.00 | REG - REGULAR PAY | 15.00 | AF - AGENCY FORM | 210.00 | |

DFES/Partner Training Team
S:...\\New_Worker_Training\\Guides\\Entries\\10_Employment_EntryGuide_091025

8

09/10/25

- ☐ **Step 12:** Enter the **Pay Frequency** as WEEKLY, **Rate Per Hour** as \$14.00, **Wage Type** as REG – REGULAR PAY, **Average Hours per Pay Period** as 15, and **Verification** as AF – AGENCY FORM.
- ☐ **Step 13:** Click Add to add this employment to the dynalist.

Totals and Comments Calculate

| | | | |
|--|---|----------------|---|
| Monthly In-Kind Amount: | \$ <input type="text" value="210"/> . <input type="text" value="00"/> | Verification: | <input type="text" value="AF - AGENCY FORM"/> |
| Total Amount Per Pay Period: | \$ <input type="text" value="210"/> . <input type="text" value="00"/> | | |
| Monthly MA Gross Amount: | \$ <input type="text" value="840"/> . <input type="text" value="00"/> | | |
| *Override MA Gross Amount: | \$ <input type="text" value="840"/> . <input type="text" value="00"/> | *Verification: | <input type="text" value="AF - AGENCY FORM"/> |
| Monthly BC+ Pre-Tax Deductions Amount: | \$ <input type="text" value="840"/> . <input type="text" value="00"/> | | |
| Monthly BC+ Taxable Amount: | \$ <input type="text" value="840"/> . <input type="text" value="00"/> | *Verification: | <input type="text" value="AF - AGENCY FORM"/> |
| *Override BC+ Taxable Amount: | \$ <input type="text" value="840"/> . <input type="text" value="00"/> | | |
| Monthly Converted Amount: | \$ <input type="text" value="903"/> . <input type="text" value="00"/> | | |
| Override Converted Amount: | \$ <input type="text" value="210"/> . <input type="text" value="00"/> | Verification: | <input type="text" value="AF - AGENCY FORM"/> |
| Monthly Total Hours: | <input type="text" value="65"/> | | |
| Monthly Override Hours: | <input type="text"/> | | |
| Subsidized Employment Subsidy: | \$ <input type="text"/> . <input type="text"/> | | |
| Comment: | <div style="border: 1px solid #ccc; padding: 5px; min-height: 40px;"> <p>started working on 1/15/25 and will not receive her first paycheck until 1/29/25. She will only receive one paycheck in January. Entered \$210 override (15 hours X \$14/hour = \$210).</p> </div> | | |

Current Size = 185 characters (240 characters max.)

Enter New Begin Month Go

- ☐ **Step 14:** Click Calculate to populate the **Totals and Comments** section.
- ☐ **Step 15:** Calculate the number of paychecks and the amount of money Ana will receive this month If it is less than her **Monthly Converted Amount**, enter the amount in the **Override Converted Amount** field with **Verification** as AF – Agency Form.
 - **Note:** If you don't need to enter an *Override Converted Amount*, move to Step 21.
- ☐ **Step 16:** Enter comments in the **Comment** box to explain how you calculated the **Override Converted Amount**.
- ☐ **Step 17:** In the Date Navigator below the **Totals and Comments** section, enter the following month for the **New Begin Month**. Click Go.

Employment Information

Effective Period

| | | | | |
|----------------|---|------------|---|---------------|
| * Begin Month: | <input type="text" value="06"/> / <input type="text" value="2020"/> | End Month: | <input type="text" value="MM"/> / <input type="text" value="YYYY"/> | Last Updated: |
| Delete Reason: | <input type="text" value=""/> | | | |

- ☐ **Step 18:** The new **Employment** page will display with a new **Begin Month**.
- **Note:** You will see an event panel stating that information for the new begin month does not exist, and information from the previous month is displayed.

| Totals and Comments | | Calculate |
|--|---|--------------------------------------|
| Monthly In-kind Amount: | \$ <input type="text"/> . <input type="text"/> | Verification: <input type="text"/> |
| Total Amount Per Pay Period: | \$ <input type="text"/> 180 . 00 | |
| Monthly MA Gross Amount: | \$ <input type="text"/> 720 . 00 | |
| ▣ Override MA Gross Amount: | \$ <input type="text"/> . <input type="text"/> | ▣ Verification: <input type="text"/> |
| Monthly BC+ Pre-Tax Deductions Amount: | \$ <input type="text"/> . <input type="text"/> | |
| Monthly BC+ Taxable Amount: | \$ <input type="text"/> 720 . 00 | |
| ▣ Override BC+ Taxable Amount: | \$ <input type="text"/> . <input type="text"/> | ▣ Verification: <input type="text"/> |
| Monthly Converted Amount: | \$ <input type="text"/> 774 . 00 | |
| ▣ Override Converted Amount: | \$ <input type="text"/> . <input type="text"/> | ▣ Verification: <input type="text"/> |
| Monthly Total Hours: | <input type="text"/> 65 | |
| Monthly Override Hours: | <input type="text"/> | |
| Subsidized Employment Subsidy: | \$ <input type="text"/> . <input type="text"/> | |
| Comment: | <div> <p>started work on 5/15/20 and will not receive her first paycheck until 5/29/20. She will receive full pay June forward. (15 hours x \$12/hour = \$180/week. Paid weekly. \$180 x 4.3 = \$774)</p> <p>Current Size = 193 characters (240 characters max.)</p> </div> | |

- ☐ **Step 19:** Scroll down to the **Totals and Comments** section and delete the **Override Converted Amount**. Remove the **Verification**.
- ☐ **Step 20:** Enter **Comments** explaining why you have removed the override.
- **Note:** You've now told CWW to budget the override amount to account for the partial pay Ana will receive during her first month of receiving money for the job, and to start counting full income for the following month and beyond.
- ☐ **Step 21:** Click Next.

☐ Employment Summary Details

| Employment Summary Details | | | | | | | | | |
|--|-----------|--------------|---------|-----------------------------|----------------|-------------------------|----------------------------|------------------|----------------|
| Individual/Sequence | | | | | | | | | |
| Individual: MASSACHUSETTS 24F PP | | | | | | | | | |
| Sequence: 1 | | | | | | | | | |
| Details | | | | | | | | | |
| Begin Month | End Month | Last Updated | Del Rsn | Employer Name | Emp Begin Date | Monthly MA Gross Amount | Monthly BC+ Taxable Amount | Converted Amount | In-Kind Amount |
| 06/2020 | | 05/20/2020 | | RIVERVIEW ELEMENTARY SCHOOL | 05/15/2020 | \$720.00 | \$720.00 | \$774.00 | \$0.00 |
| 05/2020 | | 05/20/2020 | | RIVERVIEW ELEMENTARY SCHOOL | 05/15/2020 | \$720.00 | \$720.00 | \$180.00 | \$0.00 |

[Close](#)

- ☐ **Step 22:** These actions correctly budget the first month as partial income and the following months with full income. You can view this on the **Employment Summary Details** page. To access this page, from the Navigation Menu, click Employment. Then click Summary. Next, click the clock icon.
- ☐ **Step 23:** Click Close. Click Next and complete the **Generate Summary** page. Click Next.




☐ Initiate Eligibility

Cancel ☐ [Reset](#)

| | |
|--|---|
| Page Completion Status: | All pages are complete, you may proceed to eligibility by clicking the 'Next' button. |
| Eligibility Status: | Based on the changes to the case, you should run eligibility. |
| What would you like to do? | |
| <input type="radio"/> Run Eligibility | <input type="checkbox"/> Ignore W-2 income and asset tests to allow CMF/+ Placements to begin |
| <input checked="" type="radio"/> Run Eligibility with Date | <input type="checkbox"/> Determine Potential FoodShare Supplement |
| Effective: 05 / 15 / 2020 | |

[Add Case Comment](#) Cancel ☐ [Previous](#) [Next](#)

- ☐ **Step 24:** Select Run Eligibility with Date, run with today's date, and confirm only if passing.

| Other Program Results | | | | | | | | |
|-----------------------|---|----------|--------------------|------------------|-----------|--------------------|---------------------|---|
| Run | Assistance Group | Sequence | Benefit Begin Date | Benefit End Date | AG Status | Eligibility Status | Reasons | |
| 1 | FS Z - FOODSHARE - DID NOT APPLY | 1 | 03/01/2025 | | DENIED | FAIL | 054 |  |
| | | | 02/12/2025 | 02/28/2025 | DENIED | FAIL | 054 | |
| | CC Z - CHILD CARE-DID NOT APPLY | 1 | 03/01/2025 | | DENIED | FAIL | 054 |  |
| | | | 02/01/2025 | 02/28/2025 | DENIED | FAIL | 054 | |
| | WW C - W-2 FOR OLDEST MINOR CHILD WITH CUSTODIAL PARENT | 1 | 03/01/2025 | | OPEN | PASS | |  |
| | | | | | | | | |

Add Case Comment

◀ Previous

Next ▶



Step 25: Return to the Initiate Eligibility page and Select Run Eligibility to run without dates. Double check the Benefit Begin Date that CWW is using.

- If it's next month, continue running eligibility and confirm only if passing.
- If it's two months from now, return to the Initiate Eligibility page, and Run Eligibility with Date using the first of next month as the date. After confirming the case as passing, return to this page and Run Eligibility without dates.

Placement

Since Ana is working part-time, you discuss her placement. In addition to working, Ana wants to continue working toward her HSED. You both agree that a 1/2 CSJ placement is appropriate.

- ☐ **Step 1:** Change Ana into a 1/2 CSJ (CS2) placement on the **W-2 Placement** page effective today.
- ☐ **Step 2:** Enter **Case Comments** related to the new employment, eligibility results, and change in placement.
 - ***Example:** Ana reports that she starts a part-time job at Clay Lamberton Elementary School today. She'll be working 15 hours a week and earning \$14 an hour. I verified her employment with an agency form and added the job to the Employment page. Her case remains open and passing. I updated her placement to CS2 as of today's date.*
- ☐ **Step 3:** Enter **PIN Comments** related to Ana's change in placement.
 - **Comment Type** is PLACEMENT DECISION.
 - ***Example:** I updated Ana's placement to CS2 as of today's date. We will continue to help Ana find more stable, year-round employment as she works part-time and pursues her HSED.*

Employability Plan

Now that you've entered the new job, ran eligibility, the case is passing, and you've changed her placement, it's time to update Ana's EP.

In addition to working toward her HSED and her new work hours, Ana will continue meeting with the Job Developer and Education Navigator, working on the GCF Global courses, and employment search. She tells you she completed the business communication courses online through GCF Global and has started on some Microsoft Office Courses. Right now, she's working on Microsoft Word. The two of you work to re-arrange her activities around her work hours. You also discuss adding job retention as an activity, explaining that the two of you would meet weekly to talk about how work is going. This could include any challenges and successes as well as resources Ana may need.

- ☐ **Step 1:** Create a new EP for Ana.
- ☐ **Step 2:** Review Ana's goals and record any new goals.
 - **Remember:** Check any completed **Goal Steps** as complete.

- ☐ **Step 3:** Check the box next to Ana's new job to include her employment on her EP.
- ☐ **Step 4:** Update her activities to reflect her current situation and level of participation. End any activities she is no longer completing. Update the Planned End Date, Days of the week, and/or Hours of activities she is continuing. Add new activities as needed. Her activities should include:

- Meeting with the Job Developer for 3 hours/week. Change the schedule to Monday and Friday from 8-9:30 so it does not interfere with her work schedule.
- Independent Employment Search for 10 hours/week.
- Retention Services with you for 1 hour/week on Friday afternoon.
- Attending HSED prep classes for 5 hours/week. Change the schedule to Monday and Friday from 10-12:30.
- Individual study time for HSED prep classes. Change the schedule to 3 hours/week on TU/W/TH for 1 hour/day.
- Taking online GCF Global courses. Reduce the hours/week to 2 and move to Monday from 1-3.
- Meeting with the Education Navigator 1 hour/week. Move to Friday afternoon.



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

You ask Ana if she still needs transportation assistance to complete her W-2 activities, and she confirms that she does.

- ☐ **Step 5:** Navigate to the **Supportive Services** page. Add the transportation assistance you provide Ana and click Save.
- ☐ **Step 6:** Enter PIN comments. Comments should reflect Ana's updated EP and the retention services you are offering.
 - **Comment Types** are EMPLOYABILITY PLAN/ACTIVITY ASSIGNMENT, SUPPORTIVE SERVICES.

Participation

At the end of the appointment, Ana provides you with activity logs, showing she has completed all her assigned activities.

- ☐ **Step 1:** Navigate to Ana's W-2 Participation Calendar.
- ☐ **Step 2:** Select an activity code from this week.
- ☐ **Step 3:** Enter the number of SCHEDULED HOURS as the **Hours Participated**.
- ☐ **Step 4:** Click Calculate. Then, click Save.
- ☐ **Step 5:** Use this process to enter participation for the remainder of the activities that occurred this week.
- ☐ **Step 6:** Enter **PIN Comments** regarding Ana's participation.

You are at the end of Ana's entries for Employment.



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

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

Brittany and Viktor

A few days ago, Viktor emailed you to report he has accepted a full-time job at an express lube and oil change shop as an Automotive Lube Technician. You verify his new job with an agency form and set up a phone appointment for today to update his case. Viktor starts work today and will work 40 hours a week conducting basic oil changes. The job pays \$17.00 per hour, and he is paid bi-weekly. Viktor will receive his first paycheck in three weeks.

- ☐ **Step 1:** Enter Viktor's job on the **Employment** page.
 - Remember to determine on override amount if needed.

Initiate Eligibility Cancel ☐ Reset

Page Completion Status: **All pages are complete, you may proceed to eligibility by clicking the 'Next' button.**

Eligibility Status: **Based on the changes to the case, you should run eligibility.**

What would you like to do?

☒ Run Eligibility ☐ Ignore W-2 income and asset tests to allow CMF/+ Placements to begin

☐ Run Eligibility with Date

Effective: MM / DD / YYYY

☐ Determine Potential FoodShare Supplement

- ☐ **Step 2:** Run eligibility with dates.
 - When running eligibility, click the Ignore W-2 Income and Asset Test to allow CMF/+ Placement to begin checkbox on the **Initiate Eligibility** page.
 - Confirm only if passing.
- ☐ **Step 3:** Enter **Case Comments** regarding his new job.

You complete the Informal Assessment Driver Flow with Viktor. At this time, the job does not include benefits, but Viktor hopes that will change in the future. His supervisor's contact information as Jason Young jasony@expresslube.com. Because Viktor is alone during this phone appointment, you determine it is safe and appropriate to ask him the questions about domestic violence issues. He does not report any concerns. The two of you review the results of his Career Locker Career Assessments and TABE scores. Viktor's skills include diagnostic, technical, problem-solving, and practical skills. He enjoys working in environments where he can use analytical skills, work with his hands, and be in a team environment. Potential career matches included machinist and automotive technician. This fits his desire to work with his hands on machines. The TABE shows his Math score as 610 and his Reading score as 516. Viktor says he may need a little help with reading, but feels he should be able to pursue the automotive certification he's interested in.

- ☐ **Step 4:** Complete a new Informal Assessment with Viktor.
- ☐ **Step 5:** Update Viktor's **Work History** page.
 - Document his new employment.
 - Add his supervisor as a contact.
 - Indicate that he has completed a Career Assessment.
 - Click + Add PIN Comment from this page. Record information about Viktor's employment situation and Informal Assessment.
- ☐ **Step 6:** Record his career assessment information on the **Career Assessment** page.
- ☐ **Step 7:** Click + Add PIN Comment and summarize Viktor's career assessment.
- ☐ **Step 8:** Record Viktor's TABE scores in the Test Scores app.
- ☐ **Step 9:** Click + Add PIN Comment and summarize Viktor's TABE scores.

After completing the Informal Assessment, you discuss placements he is now eligible for. You and Viktor agree to meet once a week for an hour to follow-up on how he is doing in his job and any challenges that come up. You update his placement to CMF+.

- ☐ **Step 10:** Change Viktor's placement on the **W-2 Placement** page to CMF+.
- ☐ **Step 11:** Document his new placement on the **Case Comments** page and **PIN Comments** page.
 - Remember, your PIN comment should include the reason why this placement is most appropriate.

You update Viktor's EP to include his full-time job and assign him to meet with you once a week for one hour for Job Retention. Additionally, you offer Viktor transportation assistance to help him get to work, which he accepts.

- ☐ **Step 12:** Create a new EP for Viktor.
 - Review his goals, complete any **Goal Steps** if needed, and record any new goals.
 - Check the box next to his new job to include his employment on his EP.
 - Update his activities to reflect his current situation and level of participation.

- End the career assessment and TABE test activities with a **Completion Reason** of A – SUCCESSFULLY COMPLETED. End the other activities with a **Completion Reason** of N – ACTIVITY ENDED DUE TO CMF PLACEMENT/EMPLOYMENT
- Be sure to add the job retention activity. This is the only activity he can be assigned because he is working 40 hours/week.

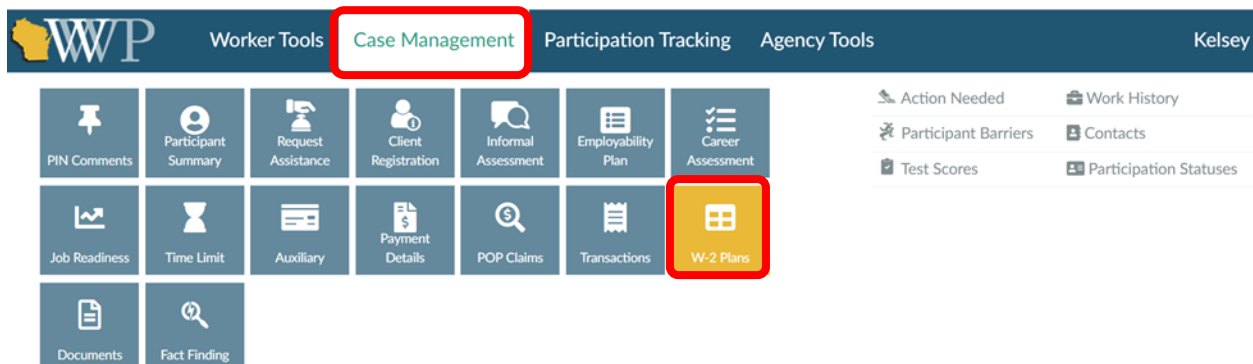


Do **not** submit Viktor's EP yet. A trainer will tell you when to submit the EP. Continue to the next step.

- ☐ **Step 13:** Navigate to the **Supportive Services** page and add his transportation assistance.
- ☐ **Step 14:** Enter PIN Comments summarizing Employability Plan updates and the transportation assistance you provide.

Supportive Service Plan

You offer Viktor a Supportive Service Plan and he thinks it's a good idea to talk about areas he may need some additional support. Viktor mentions that he has never budgeted for more than one person, and he is concerned about budgeting his new income for an entire family. You provide him with the contact information for the Family Living Educator at the UW–Extension office and inform him that they offer a Managing Your Money workshop series on Thursday nights. Additionally, you offer to complete a budget with Viktor based on his prospective income and expenses at his next appointment, which he accepts. You discuss the importance of maintaining and updating the budget on a monthly basis to ensure long-term success.



- ☐ **Step 1:** Open the **Case Management** toolbar and click on the W-2 Plans button.

W-2 Plans

SSI/SSDI Transition Plans

No Results Found

+ Add SSI/SSDI Transition Plan

Supportive Service Plans

No Results Found

+ Add Supportive Service Plan

- ☐ **Step 2:** Click the + Add Supportive Service Plan button.

New Supportive Service Plan

Emergency Needs

Not Needed ☒

Resources

+ Add Resource

Short Term Plan Of Action

Long Term Plan Of Action

Save + Continue

- ☐ **Step 3:** Viktor does not have any **Emergency Needs**. Check the Not Needed box.
- ☐ **Step 4:** Click the + Continue button.
- ☐ **Step 5:** Repeat steps 3 and 4 for **Employment Support Needs**, **Housing Needs**, and **Access to Economic Supports**.

- ☐ **Step 11:** Viktor has **Education and Training Needs**. In the **Resources** field, enter WORKFORCE INNOVATION AND OPPORTUNITY ACT (WIOA) PROGRAM, EMPLOY MILWAUKEE; 2342 N 27TH ST MILWAUKEE, WI; 414-333-5555.

« Edit Supportive Service Plan

Education and Training Needs Not Needed ☐

Resources

Workforce Innovation and Opportunity Act (WIOA) Program
Employ Milwaukee
2342 North 27th St
Milwaukee WI
414-333-5555

183 characters remaining

+ Add Resource

- ☐ **Step 12:** Click + Add Resource.
- ☐ **Step 13:** Enter MATC CAREER COACH; 700 W STATE ST S101; MILWAUKEE, WI; 414-000-5500.
- ☐ **Step 14:** In the **Short Term Plan Of Action** field, enter LOOK INTO MECHANIC CERTIFICATIONS. RESEARCH FINANCIAL AID OPTIONS AT MATC AND TALK WITH YOUR EMPLOYER TO SEE IF THEY PROVIDE CONTINUING EDUCATION ASSISTANCE. TAKE THE ACCUPLACER AND SPEAK WITH AN ADMISSIONS COUNSELOR.
- ☐ **Step 15:** In the **Long Term Plan of Action** field, enter ENROLL IN MATC'S MECHANIC PROGRAM AND OBTAIN YOUR DIPLOMA.
- ☐ **Step 16:** Click + Continue.
- ☐ **Step 17:** Viktor does not identify any other needs. Check the Not Needed box for **Health Care Needs** and **Other Needs**. On the **Other Needs** page, click + Exit.

Supportive Service Plan

Edit Supportive Service Plan

Emergency Needs ✓

Employment Support Needs ✓

Housing Needs ✓

Access to Economic Supports ✓

Money Management Needs ✓

Money Management Needs

Resource: UW - Extension Family Living Educator
6737 W. Washington St, Ste 2202
West Allis WI
414-555-5555

Delete Submit

- ☐ **Step 18:** Review Viktor's **Supportive Service Plan**. Then, click Submit.
- ☐ **Step 19:** Enter a PIN Comment summarizing Viktor's Supportive Service Plan.
- Select the W-2 PLANS **Comment Type**.
 - Example: *Viktor and I created his W-2 Supportive Service Plan during today's appointment. He does not have any emergency, employment support, housing, access to economic support, childcare, transportation, legal assistance, health care, or other needs. Viktor is concerned about how he is going to budget his new income for an entire family. I informed him about the Managing Your Money workshop series at the UW-Extension office and provided him with the contact information for the Family Living Educator. He liked the idea of the workshop and intends to sign up. We discussed budgeting and how maintaining an accurate monthly budget will help with a family this size. At our next appointment, I will help him create a budget. He will work on maintaining and updating the budget on a monthly basis. Viktor also mentioned he still wants to pursue a mechanic certification. I provided him with the contact information for the WIOA program. I also provided him with the contact information for a career coach at the local tech school. We discussed the steps he will need to take to get into school, including taking the Accuplacer, looking into certification options, reaching financial aid, and talking to an admissions counselor. I also recommended that he check with his employer to see if they offer any continuing education assistance.*

Participation

Viktor emails you his activity logs, showing he has completed all assigned activities.

- ☐ **Step 1:** Navigate to Viktor's **W-2 Participation Calendar** and record his participation.
- ☐ **Step 2:** Enter **PIN Comments** regarding his participation.

Brittany's Information

- ☐ **Step 1:** Enter PIN Comments for Brittany, summarizing the changes that affect her.
 - **Note:** *Only include information that directly affects Brittany's participation.*
 - *Example: I reviewed placement, and the case is now placed in a CMF+ due to Viktor getting a full-time job. Viktor is still the placed parent.*

You are at the end of Brittany's and Viktor's entries for Employment.



- Send an email to PTTTrainingSupp@wisconsin.gov.
- Subject Line: **Viktor Employment** and Viktor'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:

- Enter her job in CWW and WWP.
- Complete and submit a new Informal Assessment.
- Update her EP; don't submit until a trainer reviews it.
- Complete and submit a Supportive Service Plan.
- Enter appropriate Case Comments and PIN comments.

Chantelle attends her appointment and tells you she got a job at Blue River Marketing starting today. She is a Customer Service Representative doing receptionist duties, such as answering and transferring phone calls, and sorting and delivering mail. She'll also get to perform basic marketing duties, like following up with customer inquiries and directing questions to other staff. Chantelle is very excited for this opportunity, as it aligns with her dream career path.

You verify Chantelle's job with an agency form. She works 40 hours a week and earns \$15.00 an hour. Usually, she'll work 7:15 – 3:45 PM with an unpaid 30-minute lunch. She gets paid bi-weekly and will receive her first paycheck in three weeks. Her employer provides health insurance, paid sick leave, PTO, and reimbursement for continuing education. She found this job on her own.

You offer to complete a Supportive Service Plan with Chantelle, and she agrees. She's worried about not getting paid for three weeks and how that could impact what she needs for groceries because she wants to make sure she pays rent on time. She also mentions she's interested in learning more about budgeting now that she is working full-time and will not get some of the benefits she's used to, like FoodShare. You talk about requesting Transitional FoodShare and give her information on local food pantries in case she needs it during this transition. In the long-term, she thinks she'll be okay once she has a budget. She wants to budget her income and plan for her future.

You ask Chantelle if she needs anything as she starts work. She mentions she needs a few professional outfits, and will need bus passes until she gets her first paycheck. You change Chantelle's placement to a CMF+. Chantelle agrees to a weekly, 30-minute Teams meeting to discuss how her job is going, challenges and successes, and any resources and services she needs.

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



- Send an email to PTTTrainingSupp@wisconsin.gov.
 - Subject Line: **Chantelle Employment** and Chantelle's PIN.
- A trainer will review your entries and provide feedback.