

# **Changes in 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](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

Ana attends today's appointment by phone, and shares that she got a new job. With the help of the Job Developer, she worked on updating her resume, completing applications, and practicing her interview skills. The Job Developer encouraged her to apply for an administrative assistant job at a local chiropractic office. She got an interview and was offered a full-time position working 40 hours a week. Today's her last day working at the elementary school, and she starts working at the chiropractor's office tomorrow. She will be greeting visitors, answering phones, compiling mail, and composing some documents. Her work hours are 7:30 am to 4:00 pm, with a 30-minute unpaid lunch break, Monday through Friday. She will be paid \$19.00 an hour and get paid semi-monthly. The job also includes medical benefits and paid time off. She will get her first paycheck in three weeks. You confirm this information with an Employer Verification of Earnings Form.

## Employment Page in CWW

Employment Description			
Employee Type:	<input type="text"/>	Job Title for Health Insurance:	<input type="text"/>
* Employment Type:	R - REGULAR EMPLOYMENT	* Verification:	NQ - NOT QUESTIONABLE
* Begin Date:	05 / 15 / 2020	* Verification:	AF - AGENCY FORM
First Pay Check Date:	05 / 29 / 2020		
* Employment Ended?	Yes	Verification:	AF - AGENCY FORM
Employment End Date:	05 / 20 / 2020	Verification:	AF - AGENCY FORM
Date Of Last Paycheck:	05 / 29 / 2020		



### Step 1: End Ana's current job at the Elementary School.

- Navigate to the **Employment** page for her current job.
- In the Date Navigator, click Previous Effective Month and navigate to the first Begin Month sequence.
- Enter YES for "Employment Ended?", TODAY'S DATE as **Employment End Date**, and a date two weeks from today as the **Date of Last Paycheck**.

Totals and Comments		Calculate
Monthly In-kind Amount:	\$ <input type="text"/> . <input type="text"/>	Verification: <input type="text"/>
Total Amount Per Pay Period:	\$ 180 . 00	
Monthly MA Gross Amount:	\$ 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:	\$ 720 . 00	
▣ Override BC+ Taxable Amount:	\$ <input type="text"/> . <input type="text"/>	▣ Verification: <input type="text"/>
<b>Monthly Converted Amount:</b>	<b>\$ 774 . 00</b>	
Override Converted Amount:	\$ 0 . 00	Verification: AF - AGENCY FORM
Monthly Total Hours:	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. Job Ended on 5/20/20. Last paycheck being received 5/29/20. Will not receive any income in June. Entered \$0 override.</p> <p>Current Size = 151 characters (240 characters max.)</p> </div>	

MM /  YYYY

- ☐ **Step 2:** Calculate the amount of income Ana will receive in that **Begin Month**.
- Enter this amount in the **Override Converted Amount** field.
  - Update your **Comment**.
- ☐ **Step 3:** In the Date Navigator, click the arrows to navigate to the current month.
- Enter YES for "Employment Ended?", TODAY'S DATE as **Employment End Date**, and a date two weeks from today as the **Date of Last Paycheck**.
  - Calculate the amount of income Ana is yet to receive in the current month. Enter this amount in the **Override Converted Amount** field. Update your **Comment**.
  - Note:** The number of months in the sequence depends on when the income changed.

After ending Ana's job at the elementary school, enter her new job at the chiropractor's office.

- ☐ **Step 4:** Click the Add New Information button at the bottom of the page.
- ☐ **Step 5:** Enter Ana's new job with the chiropractic office. The **Begin Month** is the date of her first paycheck.
- ☐ **Step 6:** Enter the **Override Converted Amount** for the first month she has this job. Then **Enter New Begin Month** to delete the override and budget her ongoing income.
- ☐ **Step 7:** Click the Ignore W-2 Income and Asset Tests to Allow CMF/+ Placement to begin checkbox on the **Initiate Eligibility** page. Select Run Eligibility with Date.
  - 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.
- ☐ **Step 8:** Enter Case Comments.

## Informal Assessment Driver Flow

- ☐ **Step 1:** Complete a new Informal Assessment.

What is your employment status? Full-Time Part-Time Unemployed

	Lunch Room Aide Riverview Elementary School Wautoma WI	05/15/2020-----Present 15 hr/week \$12.00/Hour		
	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 2:** On the **Work History** page, click the Edit button for her Lunch Room Aid job.
- Complete the entries necessary to end this employment.
  - Save and Exit.
- ☐ **Step 3:** Indicate that she is employed Full-Time.
- Enter employment information for her job through the chiropractic office.

Ana also lets you know that last Friday she officially earned her HSED. She passed the Civics, Health, Science, and Social Studies tests. Ana received a score of 175 on both the Science and Social Studies tests.

What is your high school graduation status? Diploma GED HSED None

**GED/HSED**

State Issued Year Awarded

Wisconsin 2020

- ☐ **Step 4:** On the **Education History** page:
- Update her high school graduation status.

- WISCONSIN issued her HSED this year.
- ☐ **Step 5:** Click + Continue to continue with the Informal Assessment pages.
- ☐ **Step 6:** Submit her Informal Assessment.
- ☐ **Step 7:** In the Test Scores app, enter Ana's remaining HSED test scores.
- ☐ **Step 8:** Enter PIN comments regarding her new employment, completion of the HSED, and the Informal Assessment.

## Participation

In addition to passing the HSED tests, she completed all her activities and sends you activity logs.

- ☐ **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 her participation.

## Placement

You and Ana discuss and agree that a CMF+ placement with job retention services is the right fit for her.

Future Placement Information		Clear
Individual:	[REDACTED] 24F PP	
Placement:	CMF+ - CASE MGMT F ▼	
Placement Begin Date:	05 / 27 / 2020	

- ☐ **Step 1:** Complete the **Future Placement Information** section.
  - Enter a future **Placement** of CMF+ and her **Placement Begin Date** as tomorrow.
- ☐ **Step 2:** Enter Case Comments about her new placement in CWW.
- ☐ **Step 3:** Enter PIN Comments about her new placement in WWP.



## Employability Plan

Now that Ana has earned her HSED, she wants to look into a customer service technical certificate. She thinks this can help her advance in her new job. You plan to meet with Ana once a week for her first month to ensure she has everything she needs to be successful.

- ☐ **Step 1:** Create a new EP for Ana.
- ☐ **Step 2:** End Ana's Other Program Goal as successfully complete goal achieved.
  - Now that she is employed full-time, have her goals changed? End any other goals and record new goals as needed.
  - Enter a new Other Program Goal for Ana. She would like to earn a Customer Service Technical Certificate.
- ☐ **Step 3:** Check the box next to her new job to include Ana's employment on her EP.
- ☐ **Step 4:** Update Ana's activities.
  - End all activities except job retention.
- ☐ **Step 5:** Enter PIN comments regarding the updates to her EP.



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

## Supportive Service Plan

Ana agrees that a Supportive Service Plan will be beneficial to her. You and Ana work together to develop a plan. Ana mentions she is a little worried about getting to her new job across town. Her car has been having a lot of issues lately, and she doesn't know how she would get to work if it broke down. Ana's long-term plan of action is to save up to buy a more reliable vehicle. You provide Ana with the contact information for a local bank which assists low-income individuals with auto loans. You also tell her about the Work'n Wheels, WETAP, and JAL programs. In the short-term, she will look into bus routes and talk to her friends and family about giving her a ride to work in case of emergency.

Ana is also not sure about what to do with her schedule. Her work hours start before she can drop off Elena at school, and end after Elena should already be picked up. You ask her if she has looked into before and after school care programs at the local YMCA and with KinderCare. Ana has not looked into them yet, but would like to enroll Elena into one of these programs as her long-term plan of action. In the short-term, she will talk to her mom to see if she would drop off Elena at school and pick her up. As a back-up, Ana will reach out to Elena's school to see if they allow early drop off and talk to her neighbor to see if she is willing to watch Elena until she gets home from work.

- ☐ **Step 1:** Create a Supportive Service Plan for Ana. Check the Not Needed box on the **Emergency Needs, Employment Support Needs, Housing Needs, Access to Economic Supports, and Money Management Needs** pages.
- ☐ **Step 2:** On the **Child Care Needs** page, enter resource information for your local before/after school care programs at the YMCA and KinderCare, Ana's **Short Term Plan Of Action**, and her **Long Term Plan Of Action**. Then, click + Continue.
- ☐ **Step 3:** On the **Transportation Needs** page, enter resource information for a local bank, and your local Work'n Wheels, WETAP, and JAL programs, Ana's **Short Term Plan Of Action**, and her **Long Term Plan Of Action**. Then, click + Continue.
- ☐ **Step 4:** Check the Not Needed box on the **Legal Assistance Needs, Education and Training Needs, Health Care Needs, and Other Needs** pages. Then, click + Exit.
- ☐ **Step 5:** Review Ana's Supportive Service Plan. Then, click Submit.
- ☐ **Step 6:** Enter PIN comments regarding developing the Supportive Service Plan.

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



- Send an email to [PTTTrainingSupp@wisconsin.gov](mailto:PTTTrainingSupp@wisconsin.gov).
- Subject Line: **Ana Employment Changes** and Ana's PIN and Case Number.

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

Viktor and Brittany email you activity logs showing they both completed all of their assigned activities.

- ☐ **Step 1:** Navigate to Viktor's W-2 Participation Calendar and enter participation for the activities he completed.
- ☐ **Step 2:** Enter PIN comments regarding his participation.
- ☐ **Step 3:** Navigate to Brittany's W-2 Participation Calendar and enter participation for the activities he completed.
- ☐ **Step 4:** Enter PIN comments regarding her participation.

## Job Loss

Brittany calls you to report that Viktor lost his job. She tells you it's all a big mess. You schedule an in person meeting with Brittany and Viktor for the next day.

- ☐ **Step 1:** Enter a PIN comment, under Brittany, documenting this telephone call.

During your meeting, Viktor provides a termination document to verify his job loss and explains that he sometimes drinks at night, which causes him to oversleep.

- ☐ **Step 2:** End Viktor's employment in CWW, end dating the employment and reporting the final check information.
  - **Note:** Similar to when Viktor started the job, calculate the amount of his final paycheck(s) to budget the income he receives in the final month.

Individual Placement Information		Check for Non-CMF/+ Placement Eligibility	
Individual:	<input type="text"/>	EFT on file:	Account Holder:
Placement:	<input type="text"/>		Account Type:
Placement Begin Date:	MM/DD/YYYY		Account Number:
			Routing Number:

- ☐ **Step 3:** On the **W-2 Placement** page, click the Check for Non-CMF/+ Placement Eligibility button.
  - **Note:** Confirm only if passing.
- ☐ **Step 4:** Enter Case Comments regarding Viktor's job loss.

You complete an Informal Assessment with Viktor to determine appropriate placement and activities. While Brittany leaves the room to care for Ella, you ask Viktor about his drinking. He explains that he had a problem in the past, but got over it by himself and can do it again. Viktor does not believe it will interfere with his ability to participate in the W-2 program. You ask if you can review some resources with him, and he agrees. After continuing the conversation, he decides attending AA meetings may be a good idea. You keep him as the placed parent and change the placement to CSJ.

- ☐ **Step 5:** Complete an Informal Assessment for Viktor.
  - Record necessary changes on the **Work History** page.
  - Record new information on the **Participant Barriers** page.
    - **Remember,** Viktor does not believe this will affect his ability to participate. Do not create a page in the **Participant Barrier** app for it.
- ☐ **Step 6:** Enter PIN comments regarding his Informal Assessment and your placement decision.
- ☐ **Step 7:** Update Viktor's placement on the **W-2 Placement** page.
- ☐ **Step 8:** Enter Case comments regarding his new placement.

Together, you and Viktor update his EP.

- ☐ **Step 9:** Update his EP.
  - Remember to include Viktor's AA meetings.
  - **Note:** Parents in a CSJ placement may have fewer than 40 hours a week of activities depending on their circumstances. If you assign Viktor less than 40 hours a week, be sure to enter detailed PIN comments explaining why you assigned fewer than 40 hours a week hours.



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

- ☐ **Step 10:** Navigate to the **Supportive Services** page and record the services you provide.
- ☐ **Step 11:** Enter PIN Comments about Viktor's new EP and supportive services you provided.

- ☐ **Step 11:** Enter PIN Comments for Brittany explaining the placement change, and her participation due to Viktor's job loss and explaining why he is still the placed parent.

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



- Send an email to [PTTTrainingSupp@wisconsin.gov](mailto:PTTTrainingSupp@wisconsin.gov).
- Subject Line: ***Brittany/Viktor Employment Changes*** and their PINs.

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

# Chantelle

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**Key reminders for Chantelle entries:**

- Review and update her EP, if needed. Do not submit the EP if you update it.
- Enter any supportive services if you provided them.
- Enter PIN Comments.

You're having your weekly Teams job retention check in with Chantelle. She tells you that her boss is talking about giving her a raise or a bonus based on her outstanding work and positive customer feedback. This raise or bonus would most likely happen a couple months from now, but Chantelle has started taking on other responsibilities in the meantime.

You ask Chantelle how she's been doing with her spending plan. She shares that it was tough to stick to the plan at first, but she's gotten better at it. Chantelle says that as soon as she receives the bonus or raise, she wants to start saving for a vehicle, so she won't have to rely on the buses. Together, you discuss how to adjust her spending plan to increase her savings.

You talk to Chantelle about the added work responsibilities and how it impacts her current workload. Chantelle says she just wants to keep doing a good job so she can get that raise. Together, you explore ways she can still do a good job while talking to her boss about the expectations and demands of her new responsibilities.

Chantelle tells you that she is interested in improving her health through better eating habits.

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



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

A trainer will review your entries and provide feedback.