

# System Entry Guide: Assessment

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## Purpose:

This guide provides hands-on learning of system entries for assessment entries in work programs.

## Learning Objectives:

- Record an enrollment in Wisconsin Work Programs (WWP).
  - Document an informal assessment in Wisconsin Work Programs (WWP).
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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.

# Introduction

You completed Eligibility for Carmen and Haylee. Now, you must complete an informal assessment for both participants prior to making a placement determination. This guide provides detailed case entry instructions for Carmen's case. These instructions provide foundational knowledge of W-2 policy, process, and systems. For Haylee's case, instructions are less detailed, allowing you to apply the knowledge, information, and instruction you received during Carmen's entries.

## Instructions for Using this Entry Guide

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1. Print a copy of this System Entry Guide: Assessment.
2. Log on to the WWP Training environment: <https://wwptrn.wisconsin.gov/>
  - a. Click on WWP
  - b. Enter your WAMS ID and password
3. Enter Carmen's assessment information first, send it in for trainer review, and then enter Haylee's assessment information.
  - a. The System Entry Guide: Assessment provides the details for completing your entries.
  - b. If any information is not provided in the scenario, make it up.
4. Use WWP Help any time you have a question about a page. Click **Worker Tools** from the top of the page and select Help Center.

Contact [PTTrainingSupp@wisconsin.gov](mailto:PTTrainingSupp@wisconsin.gov) immediately with any questions, or if something does not work on your case as shown in the instructions.

# Symbols and Icons

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## System Icons



CARES Worker Web (CWW)



Wisconsin Work Programs (WWP)

## Training Icons



Contact PTT with any questions or concerns at [PTTTrainingSupp@wisconsin.gov](mailto:PTTTrainingSupp@wisconsin.gov)



**STOP** the system entry process to review other materials, or to submit activities to PTT.

# Assessment

As a reminder, you must complete the following for the Assessment portion of Initial New Worker Training.

<b>Complete in the Learning Center:</b>	<b>Make Entries in CWW and WWP:</b>	<b>Submit via Quia:</b>
<b>Assisting with Assessment</b>  <input type="checkbox"/> Assisting with Assessment <input type="checkbox"/> Evaluation: Assessment	<b>Assessment</b>  <input type="checkbox"/> Entry Guide: Assessment  Case Name PIN Carmen _____  Haylee _____	<b>Assessment</b>  <input type="checkbox"/> Quiz: Assessment

Use this System Entry Guide to complete Assessment.



Contact the Partner Training Team with any questions or concerns at [PTTTrainingSupp@wisconsin.gov](mailto:PTTTrainingSupp@wisconsin.gov).

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# Carmen

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

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

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

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

Carmen has never participated in a work program. This is her first time requesting assistance of any kind. Carmen is not currently in school. She completed 11th grade at Platteville High School. She dropped out at the start of her senior year due to some issues she doesn't feel comfortable discussing yet. She has started to think about getting her HSED now that her daughter, Lucia, is school-aged, but she doesn't know where to start. Carmen has not attended any post-secondary education.

Carmen has never served in the military. Right now, Carmen is renting, and would like to find something cheaper. She doesn't want to continue asking her mom for help with rent. She is not at risk of an eviction or utility disconnection and has no housing-related difficulties for W-2 participation. You refer her to subsidized housing and provide her with your agency's Community Resource booklet highlighting the number for the local CAP agency.

She has a valid driver's license and a vehicle to use. Gas assistance would be helpful for her to participate in activities. Carmen has no legal issues. Carmen reports there is nothing she can think of that would be a barrier to employment. She is in the

appointment by herself, so you determine that it is safe and appropriate to ask questions about any domestic violence issues. Carmen reports there is nothing like that going on. Carmen has informal daycare. Her mom usually watches Lucia, but Carmen is interested in Wisconsin Shares. She thinks certified daycare might be more stable because sometimes her mom has other appointments and cannot watch Lucia.

Carmen states Lucia has no barriers. She is a happy girl, and Carmen is so proud of her. Carmen states Lucia provides her the motivation she needs to keep moving forward. Carmen is not a non-custodial parent. Lucia is her only child. She is parenting all on her own. Lucia's other parent, Damien, is not working right now as far as Carmen knows. He is not paying child support or spending time with Lucia. Carmen does not think he would be interested in a work program.



# Entries

## WWP Homepage

Worker Tools

Recently Accessed Participants by Worker Referrals & Transfers Search

Search by: [Redacted] ?

or

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

Search Clear

[Redacted] NO PROGRAM

PIN [Redacted] DOB 01/15/1996

- Step 1:** Log on to WWP Training: <https://wwptrn.wisconsin.gov/>
- Step 2:** Click the Search tab.
- Step 3:** Enter Carmen's PIN in the **Search By** field.
- Step 4:** Click to select Carmen from the list.

## Participant Summary

Participant Summary ?

+ Enroll Participant

Basic Information

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

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

Enroll Participant

Program: W-2

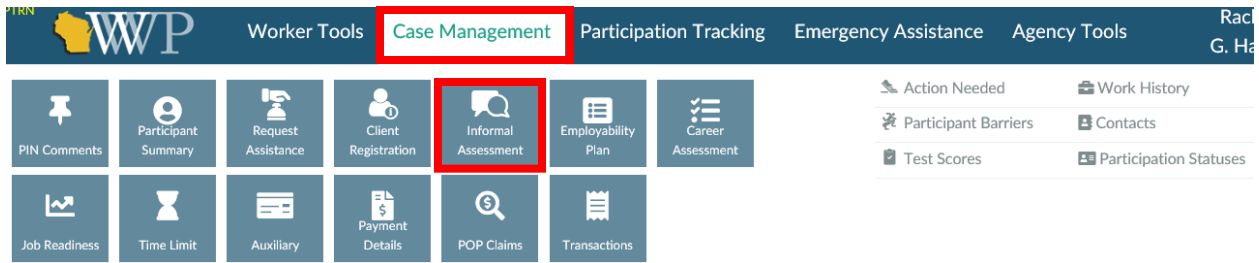
FEP ID: Kelsey Chappa

Participant is eligible for enrollment

Buttons: Cancel, Enroll

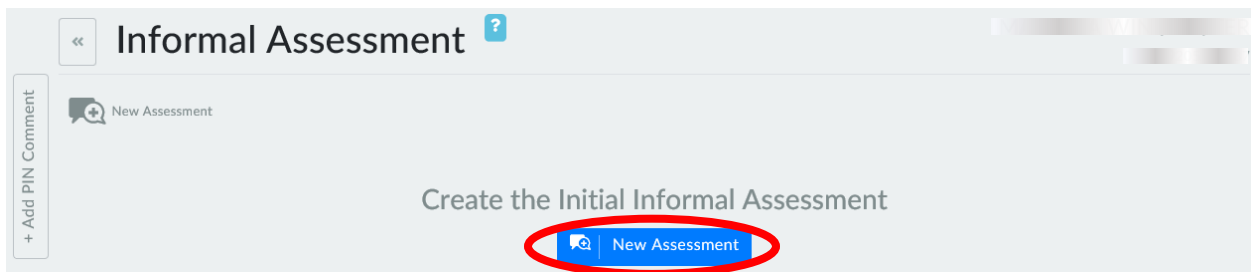
- Step 2:** A dialog box opens for enrolling Carmen.
- Step 3:** The default FEP is the worker assigned on the **W-2 Request** page in CWW. The **FEP ID** field is a drop-down and shows all workers from the office that the participant could be assigned to.
- Step 4:** WWP displays a message indicating the participant is eligible for enrollment. If the participant is not eligible, an error message displays. Click the Enroll button to enroll Carmen.
- Step 5:** When the dialog box closes, the **Participant Summary** page displays again.

## Informal Assessment



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

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



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

## Languages

**Languages** ?

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

	Language	Read	Write	Speak
What language do you use at home?	<input type="text" value="Spanish"/>	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
Which English skills do you have?	<input type="text" value="English"/>	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
List any other languages you know:	<input type="text"/>	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="button" value="🗑️"/>

[+ Add Language](#)

Do you need an interpreter?  Yes  No

Notes

1000 characters remaining

- Step 1:** For “What language do you use at home?” select SPANISH from the **Language** field drop-down menu.
- Step 2:** Indicate that it is **Read, Written, and Spoken**.
- Step 3:** Indicate that English is **Read, Written, and Spoken**.
- Step 4:** Carmen does not need an interpreter.
- Step 5:** In the **Notes** field, include other helpful information that hasn’t already been entered on this page.
  - Example: *Carmen is hopeful that her bilingual skills will be useful as she looks for work.*
- Step 6:** Click + Continue to go to the next page.

## Work History

### Work History ?

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

What is your employment status?

Full-Time Part-Time **Unemployed**

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

Select

Details

Have you ever been employed or performed volunteer work?

Yes No

+ Add Work History

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

×
?
Work History

☰

Add/Edit Record

Basic information

### Add Work Record

Job Type

Begin Date End Date

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

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

## Basic Information

Position

Company/Organization Name

FEIN

Location

Street Address

Zip



No Contact Selected



Job Duties

Reason for Leaving

- Step 8:** Enter CASHIER as the **Position** and WALGREENS as the **Company/Organization Name**.
  - In production, you can enter the FEIN, but not in the training environment.
- Step 9:** Start typing PLATTEVILLE as the **Location** and wait for the system to prompt you with Platteville, WI USA. WWP uses lookup tools from Google to find matches in fields like this. Click Platteville to populate the box.
- Step 10:** Begin entering the **Street Address** as 675 SOUTH WATER ST. Select the address from the suggestions. Note that the **Zip** (53818) automatically populates.
- Step 11:** Record her **Job Duties** per the scenario.
- Step 12:** For **Reason for Leaving**, select FIRED from the drop-down. Enter *Lost job due to poor attendance* in the **Details** field.

## Current or Most Recent Wage/Hours

Pay Types (Select all that apply.)

Select ▾ Details

Beginning Rate      Ending Rate

\$  per  ▾      \$  per  ▾  no change

Avg Weekly Hours

Notes

1000 characters remaining

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

- Step 20:** Enter CASHIER as the **Position** and KWIK TRIP as the **Company/Organization Name**.
- Step 21:** Enter PLATTEVILLE as the **Location**. Enter the **Street Address** as 430 SOUTH WATER St.
- Step 22:** Record her **Job Duties** per the scenario.
- Step 23:** In the **Reason for Leaving** field, select QUIT from the drop-down. In the **Details** field, enter *Hours changed from 1<sup>st</sup> to 2<sup>nd</sup> shift*.
- Step 24:** In **Wages/Hours Information**, select HOURLY WAGE from the **Pay Types** drop-down. Enter her **Beginning Rate** as \$10.25 and select per HOUR from the drop-down menu. Check the box to indicate that there was No Change for the **Ending Rate**. Enter 35 as her **Average Weekly Hours**.
- Step 25:** Enter any additional information provided in the **Notes** field.
  - Example: *Working 2<sup>nd</sup> shift caused difficulties for child care arrangements.*
- Step 26:** Click Save & Exit.

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

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



## Work Programs

### Work Programs ?

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

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

Yes No

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

## Education History

### Education History ?

The following questions are about your High School graduation status.

What is your high school graduation status?

Diploma GED HSED **None**

Have you ever attended school?

**Yes** No

### Last School Attended (K-12)

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

Location

City, State

School Name

Last Year  
Attended

YYYY

Last Grade Completed

Currently enrolled?

Yes No

Are you working towards a GED or HSED?

Yes No

- Step 1:** Click None to indicate Carmen’s graduation status.

- Step 2:** For “Have you ever attended school?” answer Yes.
- Step 3:** In the **Last School Attended (K-12)** section, enter PLATTEVILLE in the **Location** field. Select Platteville, WI, USA from the suggested cities.
- Step 4:** Enter the **School Name** PLATTEVILLE and select PLATTEVILLE HIGH SCHOOL from the suggested results.
- Step 5:** Enter a year seven years ago in the **Last Year Attended** field.
- Step 6:** For **Last Grade Completed**, select 11<sup>th</sup> GRADE from the drop-down menu.
- Step 7:** Indicate that she is not “Currently Enrolled?” and not “Working towards a GED or HSED?”
- Step 8:** Enter that she is interested in getting her HSED in the **Notes** field.
- Step 9:** Click + Continue to go to the next page.

## Post-Secondary Education

### Post-Secondary Education ?

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

Have you attended, or are you currently attending a college or university? Yes No

Do you have or are you working towards any licenses or certificates? Yes No

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

## Military Service

### Military Service

The following questions are about your military history.

Do you have any military training?

Yes  No

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

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

## Housing

### Housing


The following questions are about your current housing situation.



#### Current Address

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

#### Current Housing

Housing Situation	Begin Date	Monthly Amount	
<input type="text"/>	<input type="text" value="MM/YYYY"/>	<input type="text" value="\$"/> <input type="checkbox"/> Unknown	

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

Yes  No

Details

**Step 1:** From the **Housing Situation** drop-down, select RENT/OWN (UNSUBSIDIZED). Enter a **Begin Date** of one year ago. The **Monthly Amount** is \$730.00.

**Step 2:** For “Are you at risk of being evicted or forced to move?” answer No.

## Housing History

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

+ Add Housing Situation				
HOUSING SITUATION	BEGIN DATE	END DATE	EVICTED?	MONTHLY AMOUNT
	MM/YYYY	MM/YYYY		\$
DETAILS				✓
Details				🗑️

Are you at risk of having a utility disconnected?

Yes No

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

Yes No

### Action Needed ?


No Action Needed

+ Refer to Community Program or Shelter

+ Refer to Subsidized Housing



⚠️ Generic Task

 No Due Date

 Ongoing

 Worker Task



+ Refer for Energy Assistance

+ Assess for Emergency Assistance

+ Assess for Emergency Payment

+ Assess for Job Access Loan

+ Refer to External Agency

+ Other

**Step 3:** Click on the + Add Housing Situation button. Enter information showing Carmen previously rented (unsubsidized) beginning two years ago, and she rented for one year. She was not evicted, and the monthly rent was \$650.00. After completing the entry, click on the Save button (check-mark) to save it.

**Step 4:** For the questions “Are you at risk of having a utility disconnected?” and “Does your current housing situation make it hard to work or participate in work activities?” answer No.

- Step 5:** In the **Action Needed** section, click the Add button (plus sign) for Refer to Subsidized Housing. Click the Edit button (pencil icon) to edit this task.

### Edit Task ?

---

Assign To Worker Participant

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Page Housing ▼

Action Item Refer to Subsidized Housing ▼

Task  

Due Date MM/DD/YYYY  No Due Date

Completion Date MM/DD/YYYY  Did Not Complete

Priority   ▼

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Details

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Cancel Save

- Step 7:** In the **Task** field, enter PROVIDE CARMEN WITH HOUSING REFERRAL INFORMATION.
- Step 8:** Indicate a **Due Date** of one week from today.
- Step 9:** Enter **Details** including the information you will provide to Carmen. Click Save.
- Example: *Provide Carmen with agency Community Resource booklet and highlight number for CAP agency.*
- Step 10:** You are back on the **Housing** page. You have not provided Carmen with the subsidized housing referral yet, so do not mark it as complete.
- Step 11:** Include any additional information in the **Notes** field.
- Example: *Carmen is concerned that her rent is too high and would like to find a cheaper apartment.*
- Click + Continue to go to the next page.

## Transportation

### Transportation ?

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

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

Personal Vehicle	Details
Is the vehicle insured?	Is the vehicle registration current?
Yes No Unknown	Yes No Unknown
Details	Details

- Step 1:** For “Which transportation methods can you use to participate in work or work activities?” select PERSONAL VEHICLE from the drop-down.
- Step 2:** Indicate that the vehicle “Is Insured” and “Registration current.”

Do you have a valid driver's license? Yes No

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

Have you ever had a commercial driver's license (CDL)? Yes No

- Step 3:** For “Do you have a valid driver’s license?” answer Yes.
- Step 4:** Select WISCONSIN as the **State Issued** and enter 06/01/2028 as the **Expiration Date**. Carmen has no restrictions.
- Step 5:** For “Have you ever had a commercial driver’s license (CDL)?” answer No.

**Action Needed** ?  No Action Needed

- + Assist with Driver's License
- + Assist with Transportation Arrangements
- + Provide Transportation Funding
- + Assist with Job Access Loan
- + Assist with Vehicle Registration
- + Refer to External Agency
- + Other

- Step 6:** In the **Action Needed** section, add Provide Transportation Funding as a task. Click the Edit button to edit the task.
- Step 7:** In the **Task** field, enter PROVIDE GAS CARDS.
- Step 8:** Indicate that there is no due date.
- Step 9:** Click Save.
- Step 10:** You are now back on the **Transportation** page. Providing Carmen with transportation funding is an ongoing task, so do not mark it as complete.
- Step 11:** Click + Continue to go to the next page.

## Legal Issues

### Legal Issues ?

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

Have you ever been convicted of a misdemeanor or felony?

Yes No

Do you have any pending charges?

Yes No

Are there currently any restraining orders against you?

Yes No

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

Yes No

Do you have any immediate family members with legal issues?

Yes No

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

Yes No

### Action Needed ?

No Action Needed

+ Coordinate with Community Corrections Agent

+ Refer for Legal Assistance

+ Refer to External Agency

+ Other

- Step 1:** Answer No for all the questions on this page.
- Step 2:** Check the box to indicate that there is No Action Needed.
- Step 3:** Click + Continue to go on to the next page.



## Participant Barriers

### Participant Barriers ?

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

#### Physical Health

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

<input type="radio"/> Yes	<input type="radio"/> No	<input type="checkbox"/> Refused	<input type="text" value="Details"/>
---------------------------	--------------------------	----------------------------------	--------------------------------------

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

<input type="radio"/> Yes	<input type="radio"/> No	<input type="checkbox"/> Refused	<input type="text" value="Details"/>
---------------------------	--------------------------	----------------------------------	--------------------------------------

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

#### Mental Health

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

<input type="radio"/> Yes	<input type="radio"/> No	<input type="checkbox"/> Refused	<input type="text" value="Details"/>
---------------------------	--------------------------	----------------------------------	--------------------------------------

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

<input type="radio"/> Yes	<input type="radio"/> No	<input type="checkbox"/> Refused	<input type="text" value="Details"/>
---------------------------	--------------------------	----------------------------------	--------------------------------------

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

<input type="radio"/> Yes	<input type="radio"/> No	<input type="checkbox"/> Refused	<input type="text" value="Details"/>
---------------------------	--------------------------	----------------------------------	--------------------------------------

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

## AODA

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

 Yes

 No

 Refused

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

 Yes

 No

 Refused

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

## Cognitive and Learning Needs

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

 Yes

 No

 Refused

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

 Yes

 No

 Refused

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

 Yes

 No

 Refused

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

Display next section?

 Yes

 No

Please read the following to the participant: ×


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

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

## Child and Youth Supports

### Child and Youth Supports

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



#### Children

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

Do you have any children age 12 years old or under? 
 Yes  No

Lucia's referential information displays on this page based on what you have previously entered in CWW.

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

Do you have any children age 13 to 18 with special needs in need of child care? Yes No

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

Do any of your children participate in after school or summer programs? (Examples include the Boys and Girls Club, YMCA and other youth groups) Yes No

Do any of your children participate in mentoring programs? (Examples include Big Brothers/Big Sisters and Community Action Programs) Yes No

Do any of your children currently have a child welfare worker? This includes any children who live with another person most of the time. Yes No Unknown

Did you or will you age out of foster care? Yes No

Will there be any changes with your child care in the near future? Yes No

- Step 5:** For “Do you have any children 13 to 18 with special needs in need of child care?” answer No.
- Step 6:** For “Do any of your children participate in after school or summer programs? (Examples include the Boys and Girls Club, YMCA and other youth groups)” and “Do any of your children participate in mentoring programs? (Examples include Big Brothers/Big Sisters and Community Action Programs)” answer No.
- Step 7:** Lucia does not have a Child Welfare worker. Carmen has never been in foster care. Carmen is not expecting any changes to Child Care.
- Step 8:** Enter an **Action Needed** to Refer to Wisconsin Shares. Click on the Edit button.

## Edit Task ?

Assign To	Worker <b>Participant</b>
Page	Child and Youth Supports
Action Item	Refer to Wisconsin Shares
Task	
Due Date	MM/DD/YYYY <input type="checkbox"/> No Due Date
Completion Date	MM/DD/YYYY <input type="checkbox"/> Did Not Complete
Priority	<b>High</b>
Details	
<input type="button" value="Cancel"/> <input type="button" value="Save"/>	

- Step 9:** Indicate that the task is assigned to the Participant. In the **Task** field; enter APPLY FOR WISCONSIN SHARES AT THE IM AGENCY.
- Step 10:** Enter a due date two weeks in the future. Select HIGH as the **Priority** from the drop-down.
- Step 11:** In the **Details** field, enter *Follow up with the FEP when eligibility for Wisconsin Shares is established*, and include the IM agency's phone number and website.
- Step 12:** Click Save.
- Step 13:** You are now back on the **Child and Youth Supports** page.
- Step 14:** Enter any other information provided in the **Notes** field.
- Step 12:** Click + Continue to go to the next page.

## Family Barriers

### Family Barriers

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

#### SSI/SSDI

Have you ever applied for SSI or SSDI?

Yes No

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

Yes No

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

Yes No

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

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

Yes No

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

Yes No

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

Yes No

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

Yes No

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

Yes No

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

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

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

## Non-Custodial Parents

### Non-Custodial Parents

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

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

Yes  No



**Step 1:** For “Do you have any children 18 or under who live with another individual most of the time?” answer No.

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

## NCP Referral

### NCP Referral

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

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

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

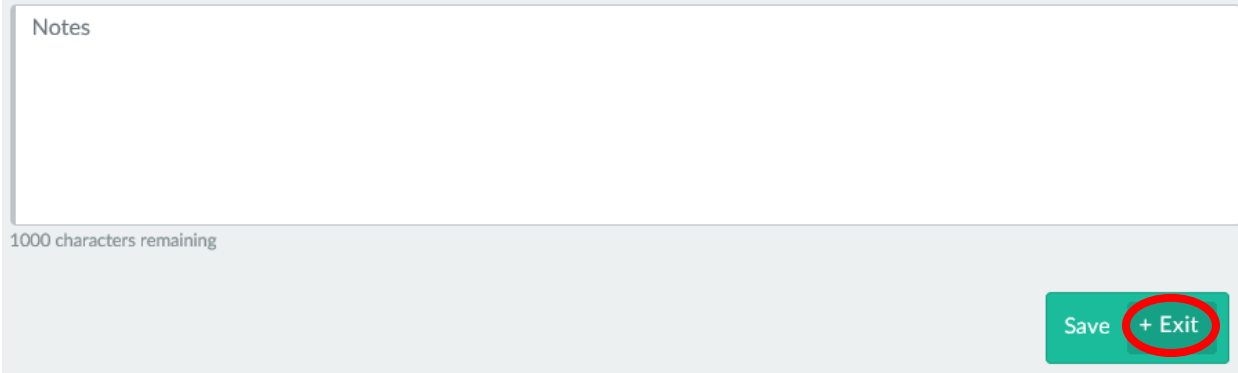
Yes  No  Skip

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

Other Parent	Children
First Name <input type="text"/>	Last Name <input type="text"/>
Is this parent currently working or available for work? <input type="button" value="Yes"/> <input type="button" value="No"/> <input type="text" value="Details"/>	How often does the other parent have contact with the child? <input type="text" value="Details"/>
Do you think this parent would be interested in participating in a work program? <input type="button" value="Yes"/> <input type="button" value="No"/> <input type="text" value="Details"/>	Is there a child support order for this child? <input type="button" value="Yes"/> <input type="button" value="No"/> <input type="text" value="Details"/>
Do you know how to get in contact with this parent? <input type="button" value="Yes"/> <input type="button" value="No"/>	<input type="button" value="Add Child"/>
<input type="button" value="Delete"/>	<input type="button" value="+ Add Other Parent &amp; Child(ren)"/>

- Step 2:** Enter the **First Name** DAMIEN and **Last Name** (Use the last name you entered for Damien in CWW) as the **Other Parent**.
- Step 3:** For “Is the parent currently working or available for work?” answer No.
- Step 4:** For “Do you think this parent would be interested in participating in a work program?” answer No.
- Step 5:** Indicate that Carmen knows how to contact Damien. Click on the add button next to the No Contact Selected field. In the drop-down box under Contact Title, select Non-Custodial Parent. Enter Damien’s name and phone number in the appropriate fields and click Save. (Enter the phone number you entered for Damien in CWW). She has no other contact with him.
- Step 6:** Enter Lucia as the **Child**.
- Step 7:** For “How often does this parent have contact with the child?” select NO CONTACT from the drop-down.
- Step 8:** Indicate that there is a “child support order,” and enter *\$200 per month* in the **Details** field.





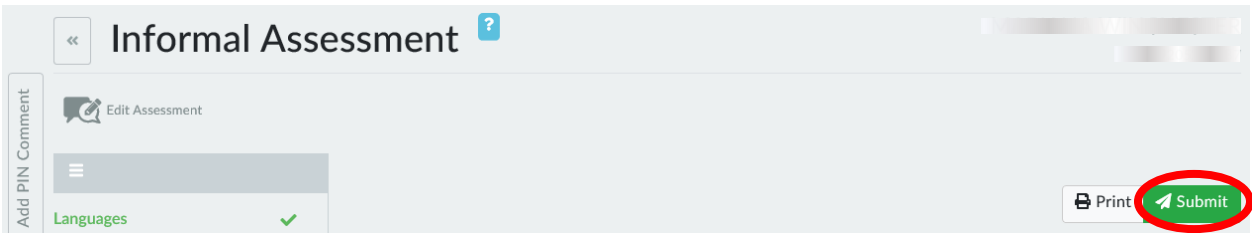
Notes

1000 characters remaining

Save + Exit

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

## Informal Assessment Summary

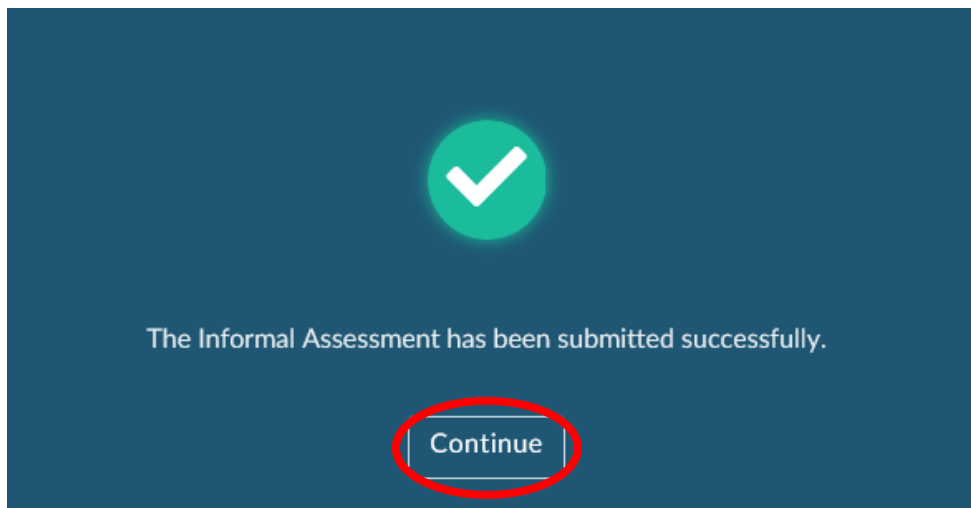


Informal Assessment

Edit Assessment

Print Submit

- Step 1:** Click the Submit button to submit Carmen’s informal assessment.

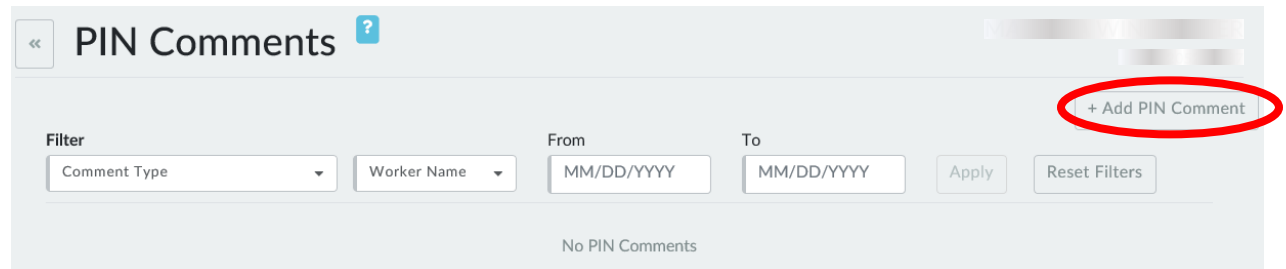


- Step 2:** Click Continue.

## PIN Comments



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



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

×

## Add PIN Comment ?

Comment

Notes

1000 characters remaining

Comment Type (Select all that apply.)

Select

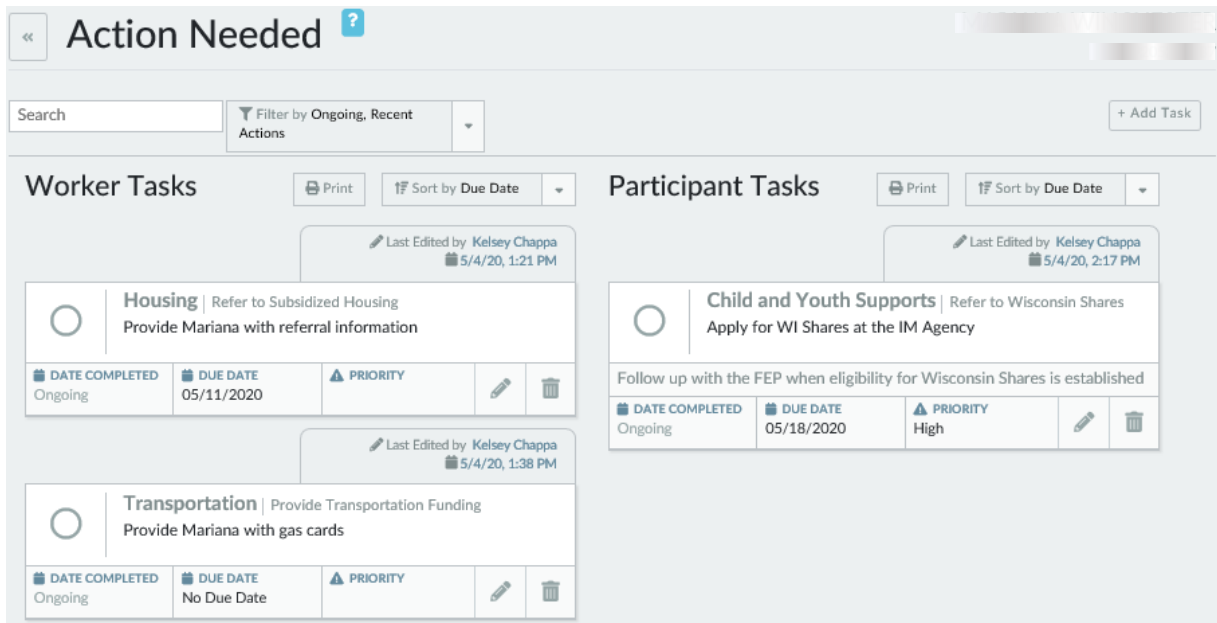
Cancel
Save

- Step 3:** Enter comments to summarize Carmen’s informal assessment, and document any information not already recorded in WWP.
- Example: *Carmen reads, writes, and speaks English. She is not currently employed, and has experience working as a cashier at Walgreens and Kwik Trip. She hasn’t worked for the last three months, but has been looking for work. She wants to find 1st shift, customer service work with consistent hours. Carmen’s highest level of education is 11th grade. She is interested in getting her HSED. She has never participated in another work program or served in the military. Carmen currently is renting an apartment, but is concerned her rent is too high. I referred her to subsidized housing and provided the contact information for the local CAP agency. Carmen has her own vehicle and a valid driver’s license. Carmen expressed a need for transportation assistance and I will provide gas cards for her to attend appointments and complete activities. Carmen reports no legal issues, personal barriers, family barriers, or children living outside the household. Her mom watches Lucia when she’s not in school, but Carmen would like to find a more stable childcare arrangement. I provided the contact information for Wisconsin Shares. Carmen will follow up with me after she establishes Wisconsin Shares eligibility. She has no contact with Lucia’s father, Damien.*
- Step 4:** Select INFORMAL ASSESSMENT for **Comment Type**. Click Save.

## Action Needed App



- Step 1:** Using the **Case Management** navigation toolbar, click on the Action Needed App.



- Step 2:** There should be three Action Needed items listed:
  - Worker Tasks
    - A referral to subsidized housing
    - Provide gas cards
  - Participant Tasks
    - Apply for Wisconsin Shares

## Work History App

The screenshot shows the WWP Worker Tools navigation menu. The 'Work History' option is circled in red. The menu includes the following options:

- PIN Comments
- Participant Summary
- Request Assistance
- Client Registration
- Informal Assessment
- Employability Plan
- Career Assessment
- Job Readiness
- Time Limit
- Auxiliary
- Payment Details
- Action Needed
- Participant Barriers
- Test Scores
- Work History (circled in red)
- Contacts
- Participation Statuses

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

The screenshot shows the Work History app interface. It includes a search bar, a sort by date dropdown, and a print button. The main content area displays two work history entries:

Job Title	Company	Address	Start Date	End Date	Duration	Hourly Rate	Actions
Cashier	Kwik Trip	430 South Water Street Platteville, WI 53818	02/04/2018	02/04/2020	2 years, 0 months	\$10.25/Hour	[Edit] [Delete]
Cashier	Walgreens	675 South Water Street Platteville, WI 53818	08/04/2015	05/04/2016	9 months	\$9.00/Hour	[Edit] [Delete]

Additional options include a search bar, a sort by date dropdown, a print button, and an '+ Add Work History' button.

- Step 2:** Review Carmen's two work history entries:
- Walgreens, and
  - Kwik Trip

## Participant Barriers App

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

- Step 2:** Carmen has no barriers at this time.

## Contacts App

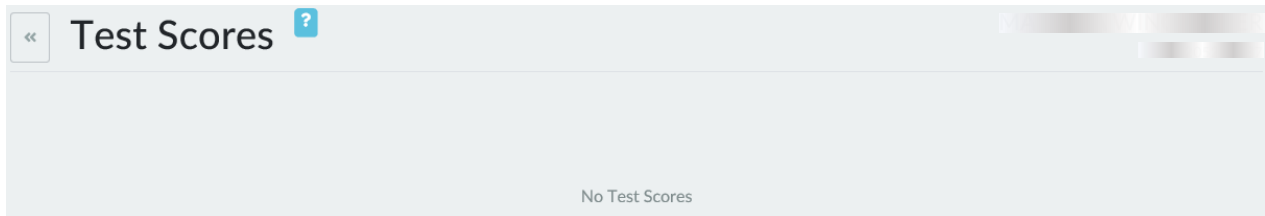
- Step 1:** Using the **Case Management** navigation toolbar, click on the Contacts App.

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

## Test Scores App



**Step 1:** Using the **Case Management** navigation toolbar, click on the Test Scores App.



**Step 2:** There are no test scores for Carmen at this time.

## Job Readiness

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

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

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

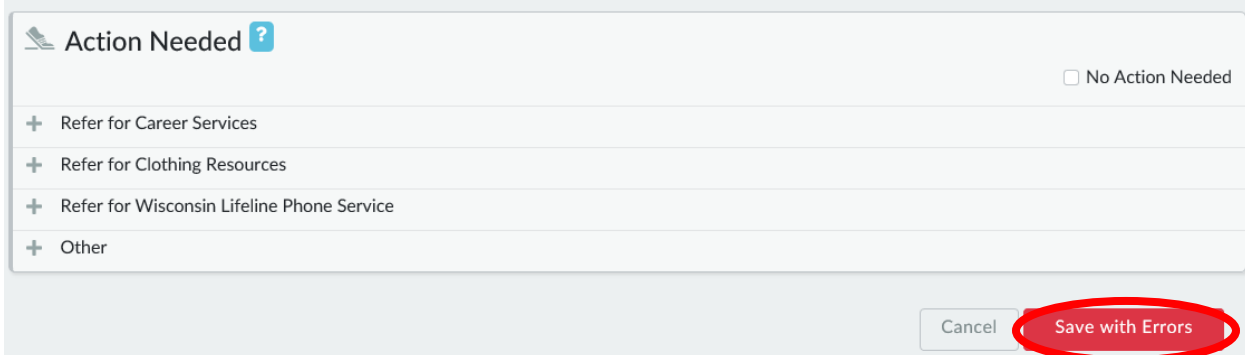
## Entries

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

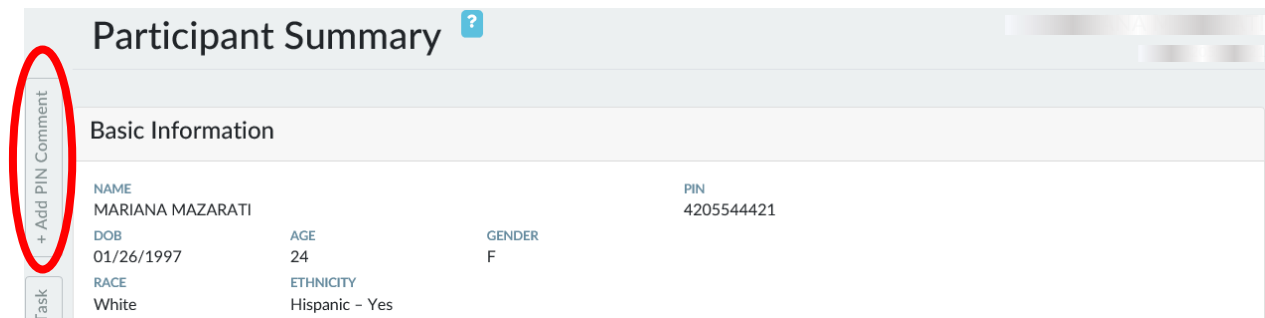




- Step 3:** Click Save.
  - The **History Questions, Application Questions, and Interview Questions** will turn red, and a banner will appear at the top of the page stating *Required information not provided. The following information is needed to complete this section:* We will enter this information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



- Step 4:** Click Save with Errors.



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

- Step 6:** Record new PIN Comments summarizing Carmen’s job readiness.
- Select JOB READINESS/CAREER ASSESSMENT as the **Comment Type** and click Save.
  - Example: *I discussed the Work Preferences and Contact Questions with Carmen during today's appointment, and will complete the remaining questions at a future appointment. Carmen wants to work in an office setting as a receptionist or in customer service because she thinks she is a good communicator and likes to work with people. She identified she needs to get her HSED to get a job in these fields. Carmen wants to avoid working for a micro-manager, and would like 1st shift work within 20 minutes or 10 miles from home. Her voicemail and email are set up. Carmen states she doesn't always have internet access to check her email. We discussed locations she can check her email, and she decided she will check it at the library or the Job Center at least four times a week.*



You have completed Assessment for Carmen. **Do not continue processing this case.** Further entries are made in a later course.

Send an email to [PTTTrainingSupp@wisconsin.gov](mailto:PTTTrainingSupp@wisconsin.gov) with:

- the subject line “**Assessment Carmen,**” and
- Carmen’s PIN.

# Haylee

You have successfully completed an informal assessment. Now it's time to take what you learned with the Carmen entries and apply that knowledge to Haylee's entries. There are fewer instructional prompts. Refer to previous pages and instructions in this System Entry Guide: Assessment for help and reminders as you make Haylee's entries.

## Work Programs

Haylee is a single mom to two children: her son Parker, who is 9 years old; and her daughter, Sophia, who is 3 weeks old. Haylee is dating Sophia's other parent, Luka. Luka does provide assistance with Sophia. He accompanied Haylee to her appointment to help her with their baby. Haylee states Luka can sit with her during this appointment.

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

Haylee had a full-time factory/manufacturing job, which she enjoyed. She lost that job due to Parker's barriers, which includes a diagnosis of Autism, and child care issues. It's difficult 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, Haylee earned \$12.50/hour. By the time her job ended, she was making \$16.00/hour. She was responsible for setting up, operating, and tending to plastic molding machines. Haylee knows she is going to need a job with a flexible schedule and child care equipped to provide care to Parker.

Haylee has not previously participated in other work programs. This is her first time requesting assistance of any kind. Haylee graduated from Tremper High School in Kenosha 16 years ago. After high school, Haylee 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. Haylee feels that obtaining a degree would open some employment doors for her.

Haylee has never served in the military. Haylee has been in her current apartment for about one year. Her rent is \$700 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. Luka helps when he can. She likes where she lives, as it's quieter than her previous apartment. This is beneficial for Parker. Haylee has a past housing history. The previous place she rented was very noisy, which aggravated Parker's medical issues. She left that apartment after having lived there for about two years. Her rent was \$685 per month.

Haylee 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. Haylee is juggling being a mom to a son with special needs and a newborn daughter. Haylee was just diagnosed with post-partum depression two weeks ago. She has difficulty concentrating and is not sleeping well. It is affecting her day-to-day routine, and her ability to fully participate in work activities right now. She likes her counselor, Jane Jones, and plans to continue with her weekly appointments.

Haylee indicates that her mental health concerns might be a barrier to participating in work activities at this time. She provides Jane's contact information: Jane Jones, jonesj@communitypartners.org, 952-555-1444. Haylee signs a release of information form allowing you to communicate with Jane. You refer Haylee for a formal assessment and provide accommodations for her concentration deficits and sleep disorder.

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

Both of Haylee's children are under 12 years old. There are no daycare arrangements yet for Sophia. Haylee will need daycare to participate in the program. Haylee has certified daycare after school for Parker – when his behavioral issues allow him to attend. Parker 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 no Head Start. The family does not participate in any other program. Haylee would like information on child care resources and Head Start. She would like to apply for Wisconsin Shares.

Parker receives SSI for Autism. Due to his behavior issues related to his disability, Parker requires supervision at all times, which can make it difficult for Haylee to participate in other activities. Haylee will need a flexible work activity schedule due to Parker's barriers. You plan to provide the "Need to Care for Disabled Family Member Form" to Haylee at the end of the assessment.

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

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

## Entries

- Step 1:** Log on to WWP. Search for Haylee's PIN and select her from the list.
- Step 2:** Click the Enroll Participant button. Enroll Haylee.
- Step 3:** Complete an informal assessment with Haylee. She reads, writes and speaks English at home.
- Step 4:** Haylee is unemployed due to Caring for a Family Member. Provide details. She has completed a Career Assessment.
- Step 5:** 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 \$12.50/hr., and her ending wage was \$16.00/hr. Enter any additional information provided in the **Notes** field. Click Save and Exit.
- Step 6:** Haylee is not involved in any other work programs.
- Step 7:** She got her diploma from Tremper High School in Kenosha 16 years ago.
- Step 8:** Haylee 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.
- Step 9:** Haylee has never served in the military.
- Step 10:** Haylee is renting. Record her monthly rent. She is not at risk of eviction or utility disconnection, and her housing does not cause difficulties. Enter Haylee'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.
- Step 11:** Haylee uses Public Transit. Include **Details** about why her driver's license is suspended. She has no CDL. Include an **Action Needed** item to assist with transportation funding.
  - Edit the task to provide additional details.
- Step 12:** Indicate that Haylee has no legal issues.

- Step 13:** Enter Haylee’s mental health barrier. She does feel that this will affect her participation in work programs right now. Click + Add Barrier.

**Participant Barrier**

**Barrier Details**

Barrier Type: Mental Health

Barrier Subtype (Select all that apply.): Select

Onset Month: MM/YYYY

End Month: MM/YYYY

Details: [Text Field]

No Contact Selected

+ Add Contact

- Step 14:** 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. You refer Haylee for a formal assessment today.

**Accommodations**

Are accommodations needed for this barrier? Yes No

Accommodation for	Begin Date	End Date	Details
[Dropdown]	MM/DD/YYYY	MM/DD/YYYY	Details

+ Add Accommodation

- Step 15:** 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, *Haylee 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. Haylee is allowed to flex her schedule as needed to accommodate her sleep issues.*
- Click Save and Exit.

- Step 16:** Haylee has no other barriers. Answer No to **Display next section?**

- Step 17:** Haylee has two children 12 years of age or under. Enter Parker's information. Include that he has certified afterschool care, and indicate that he has special needs. In the **Details** field, explain Parker's child care situation. Click + Add Child. Enter Sophia's information, indicating that there is no childcare arrangement at this time.
- Step 18:** The family is participating in a Birth to 3 program and receives WIC services. Identify the **Action Needed** items, and edit the tasks as needed, including adding details for each task.
- Step 19:** Indicate that Haylee has a family member receiving SSI, and has caretaker responsibilities for Parker. Include **Details** for both. She is concerned that these responsibilities will affect her ability to participate. Parker's disability causes behavioral problems. Indicate that you need to provide the "Need to Care for a Disabled Family Member" form to Haylee, but you have not yet provided it.
- Step 20:** Answer No to the question on the **Non-Custodial Parents** page.
- Step 21:** Enter **Other Parent** information to include details about Simon, including his contact information. Enter **Children** information to include details about Simon's involvement with Parker. Click + Add Other Parent & Child(ren). Enter **Other Parent** information to include details about Luka, including contact information. Enter **Children** information to include details about Luka's involvement with Sophia.
- Step 22:** Click the Submit button to complete Haylee's informal assessment.
- Step 23:** Review the apps under the **Case Management** toolbar. There should be:
  - five **Action Needed** items:
    - four for the Worker,
    - one for the Participant,
  - one **Work History**,
  - one **Participant Barrier**, and
  - three **Contacts**.
- Step 24:** Click **PIN Comments** from the **Case Management** navigation toolbar. Record PIN comments summarizing Haylee's informal assessment, and select the appropriate **Comment Type**.
  - Ensure PIN comments reflect her current situation, informal assessment results, and any decisions and actions taken. Remember, PIN comments are not confidential.

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## Job Readiness

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Haylee is not quite 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 fulltime work. She has a newborn, and still is trying to get Parker on a solid schedule. If she were to look for work hours, during the mid-day would be best. Haylee also wants to be close to home, perhaps 5 miles and/or 30 minutes away.

Haylee'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 Haylee plan to review the remainder of these questions at a later appointment as she continues with the program.

## Entries

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





You have completed Assessment for Haylee. **Do not continue processing this case.** Further entries are made in a later course.

Send an email to [PTTTrainingSupp@wisconsin.gov](mailto:PTTTrainingSupp@wisconsin.gov) with:

- the subject line “**Assessment Haylee,**” and
- Haylee’s PIN.

## Conclusion

Congratulations on entering your first assessments! This is a big step. It’s important to gather a wide range of information so you can make the best case management decisions in partnership with the participant. After you have completed everything in this section, a trainer will email you your next steps.