

# System Entry Guide: Ongoing Part One

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## Purpose:

This guide provides hands-on learning of system entries for W-2 ongoing processes.

## Learning Objectives:

- Identify system pages to update based on changes in participant circumstances.
  - Formulate case management plans that reflect changes in participant circumstances.
  - Record updates of participants' ongoing changes.
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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've taken a lot of initial steps and made some decisions on your cases. All those steps lead you to: Ongoing Processes. When working with participants, you need to respond to various changes, enter and update information, re-determine eligibility, and make many case management decisions. This System Entry Guide guides you in processing those updates.

The screenshots in this Guide show examples of what can be added, your entries may be different. Make entries based on the scenarios and written instructions in this guide. Use the screenshots only as a resource for where to make various entries in the systems.

## Instructions for Using this Entry Guide

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1. Print a copy of this System Entry Guide: Ongoing Part One.
2. When you see the stop sign, follow the instructions for submitting your case to the Partner Training Team at [PTTTrainingSupp@wisconsin.gov](mailto:PTTTrainingSupp@wisconsin.gov).
3. Use the CWW System Help and WWP Help Center at any time.
4. Email the Partner Training Team with any problems, or if your results don't match what is explained in the instructions.

\*\*In training, when making Employability Plan entries, DO NOT click Submit on the EP until a trainer reviews your entries and directs you to submit the EP. This will save you time and work when making any needed corrections. \*\*

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# Icons

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## System Icons



CARES Worker Web (CWW)



Wisconsin Work Programs (WWP)

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## Training Icons



Access the **CWW Help** resources for specific questions. On any CWW page, clicking the **Help** button will open **System Help** for that page in a new window.



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



PAUSE your current entries by not submitting the EP. Continue to the next section of the entry guide and send an email to PTT when instructed.



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

# Ongoing Processes

As a reminder, you need to complete the following for the Ongoing Processes portion of Initial New Worker Training.

<b>Complete in the Learning Center:</b>	<b>Make Entries in CWW and/or WWP:</b>
<p><b>Ongoing Processes Module 1</b>  <input type="checkbox"/> Subsequent EPs Process Document</p>	<p><b>Ongoing Processes Module 1</b>  <input type="checkbox"/> Entry Guide: Ongoing Processes Part One</p> <p>Case Name _____ PIN _____                      Carmen _____  <input type="checkbox"/> Changes At Next Appointment</p> <p>Case Name _____ PIN _____                      Haylee _____  <input type="checkbox"/> Changes At Next Appointment</p>

Use this System Entry Guide as you complete Ongoing Processes Part One.



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

# Carmen

Let's start with Carmen's story. There are a lot of changes to make to her case. If a piece of information is not provided (e.g., address, contact name), make it up. Carmen is eager to enter the workforce. Currently, she is in a CSJ placement.

## Changes at Next Appointment

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You meet with Carmen to make updates and changes to her case, including reviewing her participation in assigned activities and updating her Employability Plan.

Since you last met with Carmen, she completed the TABE. You reviewed her scores with her. She scored 580 in Math and 568 in Reading. Carmen was happy with these results as she expected to have a lower reading score. Based on these results, you and Carmen decide her goal of obtaining her HSED within six months is still realistic.

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

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

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

You and Carmen discuss her last interview. It was when she interviewed for her job at Kwik Trip. She states she was nervous, but she feels it obviously went well, as she got

the job. Now, Carmen is not so sure how to discuss why she left her last job. Although she has an Instagram account, she never posts anything. She is not concerned about an employer seeing anything. Carmen has two different outfits she could wear to job interviews.

She has been focusing on her job search for clerical positions. She applied for some jobs and followed up on them, but has not received any calls for interviews. She tells you she is a bit discouraged and thought it would be easier. However, she also tells you she is still committed to this job search, but wonders if she could reduce the amount of hours per week.

You follow up on her action items. She has childcare set up, and an appointment to apply for Section 8 Housing assistance later this week.

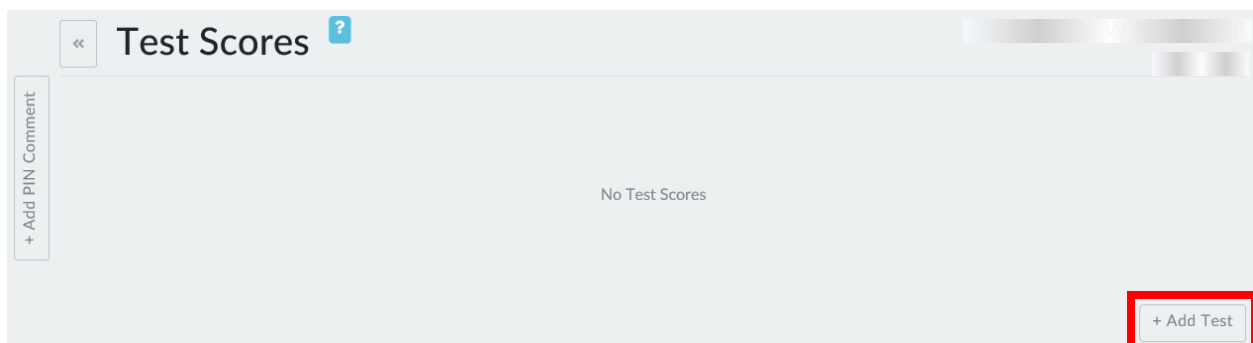
You and Carmen discuss her other activities and decide on new activities based on her assessment results. Carmen thinks she will reach her typing goal within the next week. She also says she isn't getting much out of the Job Readiness Essentials workshop. She's willing to attend the next sessions because it is supposed to be on assertiveness, but then would prefer to focus on something else.

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

Carmen completed work experience orientation and agrees to work experience at Our Neighbors, a local non-profit that provides community outreach activities. This is a clerical position, where she will answer the phone, receive and sort mail, and do some scheduling. Carmen agrees to continue to meet with the Job Developer, attend Job Club, and search for employment.

## Entries

### WWP



- Step 1:** Locate your Carmen case in WWP.

- Step 2:** From the **Case Management** navigation toolbar, select the Test Scores App.
- Step 3:** Click on + Add Test.

### Add Test Score ? ×

Test Type TABE 9 & 10

Date Taken 05/14/2020 ×

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

Details

380 characters remaining

Cancel
Save

- Step 4:** Click on the **Test Type** drop-down to show available choices. Select TABE 9 & 10.
- Step 5:** Enter a date five days ago.
- Step 6:** Enter the following test scores.
  - **Reading Scale Score 568**
  - **Mathematics Scale Score 580**
- Step 7:** Click Save.



Test Scores

GED/HSED Prior TABE

TUBE 9 & 10

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

03/03/2021

- Step 8:** Click + Add PIN Comment.
- Step 9:** Record comments related to her Educational Needs Assessment.
  - Select **Comment Type** INFORMAL ASSESSMENT.
  - Example: *Carmen completed the TABE and we reviewed her scores during today's appointment. She scored a 580 in Math and a 568 in Reading. Carmen expected to have a lower reading score, but doesn't feel it will impact her ability to get her HSED within six months.*
- Step 10:** Click Save.
- Step 1:** From the **Case Management** navigation toolbar, select the Action Needed App.

Action Needed

Search Filter by Ongoing, Recent Actions + Add Task

**Worker Tasks** Print Sort by Due Date

**Participant Tasks** Print Sort by Due Date

**Housing** | Refer to Subsidized Housing  
Provide █████ with referral information

DATE COMPLETED: 05/19/2020 DUE DATE: 05/11/2020 PRIORITY: [Triangle]

**Child and Youth Supports** | Refer to Wisconsin Shares  
Apply for WI Shares at the IM Agency

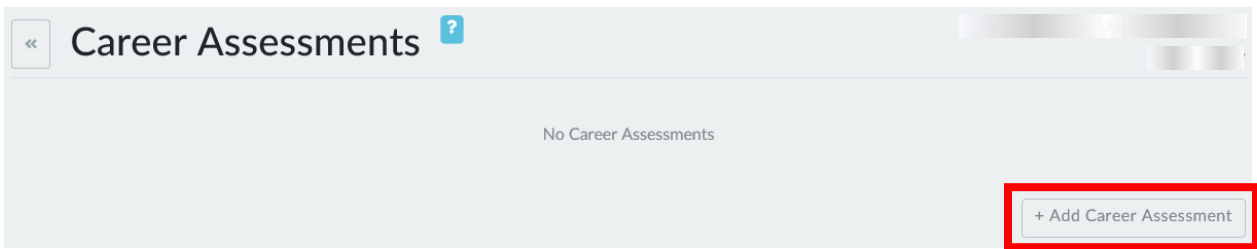
Follow up with the FEP when eligibility for Wisconsin Shares is established

DATE COMPLETED: 05/19/2020 DUE DATE: 05/18/2020 PRIORITY: High

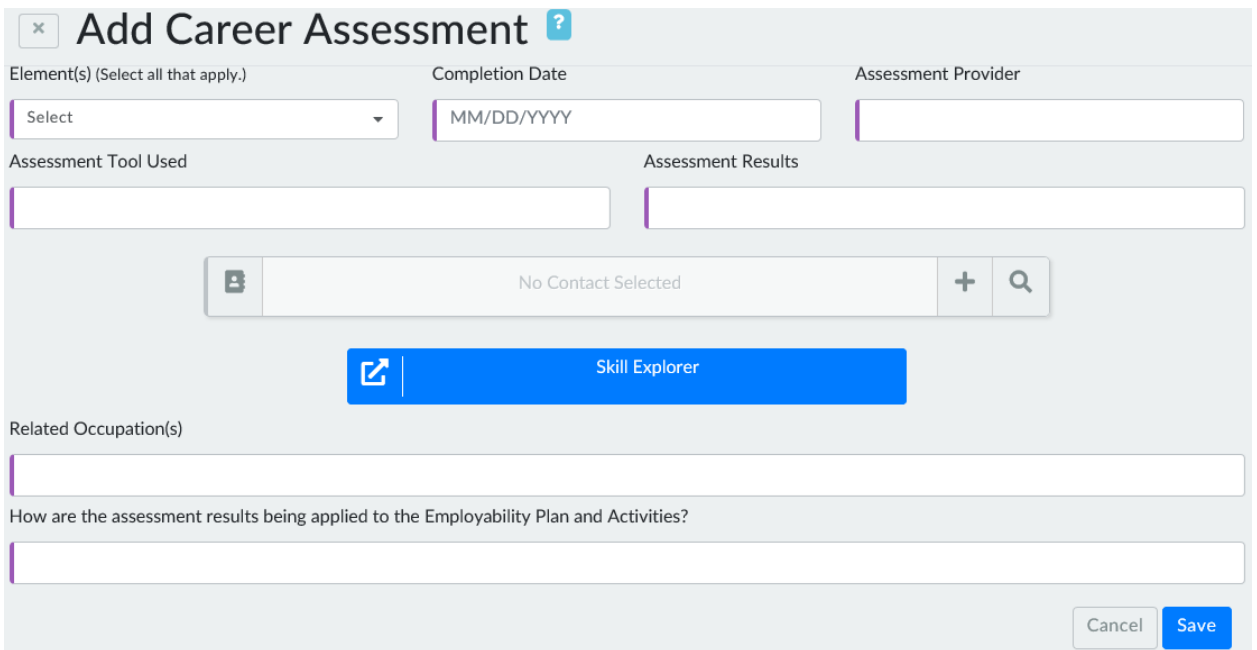
- Step 2:** Mark the Housing and Child and Youth Supports action items as complete by clicking on the circle.



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



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



- Step 3:** From **Element(s)**, select WORK STYLES, SKILLS, and INTERESTS.
- Step 4:** Enter a date four days ago.
- Step 5:** Enter YOUR AGENCY as the **Assessment Provider**.
- Step 6:** Enter CAREER LOCKER as the **Assessment Tool**.
- Step 7:** For **Assessment Results** and **Related Occupations**, summarize Carmen's results.
  - Be sure to include specific skills, interests, and occupations that were mentioned in the scenario, along with any other relevant information.
- Step 8:** For the question "How are the assessment results being applied to the Employability Plan and Activities?" include specific examples of how the assessment results relate to the goals and activities on Carmen's employability plan.
  - An example: *Carmen's goals are directly related to gaining employment in her desired career field. Education and work experience in an office setting will be used as steps in achieving goals.*
- Step 9:** Click Save.
- Step 10:** Click + Add PIN Comment and add comments summarizing Carmen's Career Assessment results.
  - Select **Comment Type** JOB READINESS/CAREER ASSESSMENT.

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

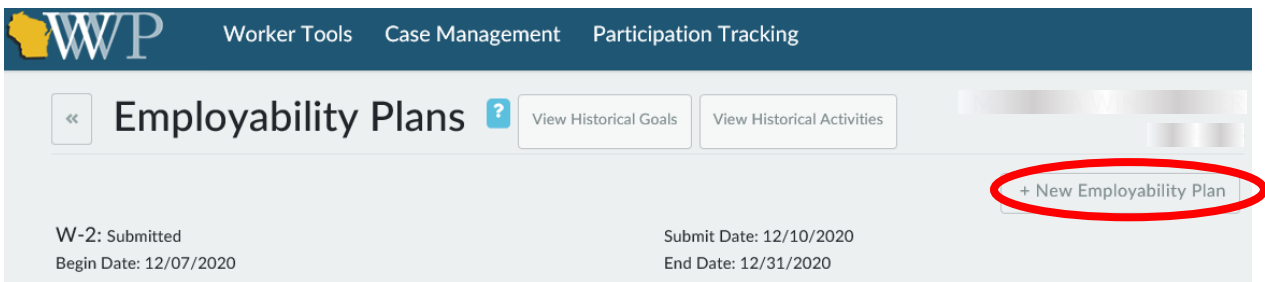
Yes	No	Unknown	Details
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- Step 11:** From the **Case Management** navigation toolbar, select **Informal Assessment**. Navigate to the **Work History** page.
- Step 12:** Answer Yes to the question "Have you ever completed a career assessment either online, in a school setting, or through a work program?"

- Step 13:** In the **Details** field, enter CARMEN COMPLETED CAREER LOCKER ASSESSMENT. DETAILS ON CAREER ASSESSMENT PAGE.
- Step 14:** Click Save
- Step 1:** From the **Case Management** navigation toolbar, select **Job Readiness**.
- Step 2:** Complete the **History Questions, Application Questions,** and **Interview Questions** fields.
  - Refer to the scenario. Include specific details.
  - Carmen has no action needed items.
- Step 3:** Click Save.
  - The **Job Readiness** page now should be saved without errors.
- Step 4:** Click + Add PIN Comment, and add comments summarizing Carmen’s job readiness.
  - Select **Comment Type** JOB READINESS/CAREER ASSESSMENT.



- Step 5:** Navigate to the **Employability Plans** page via the **Case Management** navigation toolbar.



- Step 1:** Click the + New Employment Plan button to create a subsequent EP. This initiates the Employment Plan driver flow for the subsequent EP.

- Step 2:** Enter the **EP Begin Date** as today’s date, and the **EP End Date** as one month from today. Select No for **Create EP Without Activities?**
- Step 3:** Click + Continue to go to the next page.

**Goals**

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

- Step 4:** Click on Carmen’s **Primary Employment Goal** of **Receptionist** to edit this goal.

**Goal Steps**

Step

Complete Career Cruising career assessment by next appointment.	<input type="checkbox"/> Completed?
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Step

Cancel Save

- Step 5:** Click **Completed?** for the **Goal Step** “Complete Career Locker career assessment by next appointment.”
- Step 6:** Click Save.
- Step 7:** Click on Carmen’s **Other Employment Goal** of **Obtain HSED**.

**Goal Steps**

Step

TAKE THE TEST FOR ADULT BASIC EDUCATION (TABE) AND REVIEW RESULTS WITH	<input type="checkbox"/> Completed?
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- Step 8:** Click **Completed?** for the **Goal Step** “Take the test for Adult Basic Education (TABE) and review results with FEP at next appointment.”
- Step 9:** Click Save.
- Step 10:** Click + Continue to save and navigate to the **Employments** page.
- Step 11:** Click + Continue to save and navigate to the **Elapsed Activities** page.
  - Your TABE activity may or may not be elapsed, depending on the date you entered the activity and the date you are creating a new EP.
  - If the TABE activity is elapsed, select A – SUCCESSFULLY COMPLETED.

Activity:	Start Date:
Career Planning & Counseling	11/17/2023
Activity Description:	Planned End Date:
COMPLETE THE TEST OF ADULT BASIC EDUCATION (TABE)	11/17/2023
Completion Reason:	
<input type="text" value="A - Successfully completed"/>	


- Step 12:** Click + Continue to save and navigate to the **Activities** page.

## Activities

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

- Step 13:** Click on the “Complete Career Locker career assessments” activity to edit this activity.


- Step 14:** Scroll to the bottom of the page and click **End Activity?**
- Step 15:** Select A – SUCCESSFULLY COMPLETED from the **Completion Reason** drop-down.
- Step 16:** Enter yesterday’s date for the **Actual End Date**.
- Step 17:** Click Save.
- Step 18:** Click on the “Complete the Test of Adult Basic Education (TABE)” activity to edit this activity.
  - If the TABE activity was elapsed for you, then you have already entered this as complete and can skip to step 20.
- Step 19:** Repeat steps 14-17 for this activity.
  - this activity hasn’t started yet, click the Cancel button to return to the **Activities** page. Click the Delete button to remove the activity from the EP.

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

- Step 20:** Click on the “Attend Work Experience Orientation to Prepare for an Office-Related Worksite” activity to edit this activity.
- Step 21:** Repeat steps 14-17 for this activity.
  - If this activity hasn’t started yet, click the Cancel button to return to the **Activities** page. Click the Delete button to remove the activity from the EP.
- Step 22:** Click on the “Research options for back up childcare” activity to edit this activity.

- Step 23:** Repeat steps 14-17 for this activity.
- Step 24:** Click on the “Meet with Job Developer to get assistance navigating the local labor market” activity to edit this activity.

**Activity Scheduler**


Start Date: 12/20/2023  Recurring? 

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

Planned End Date: 01/20/2024

- Step 25:** Change the **Planned End Date** to a date one month from today and click Save.
- Step 26:** Click on the “Attend job club” activity to edit this activity.
- Step 27:** Repeat Step 25 for this activity.
- Step 28:** Click on the “Complete independent job search” activity to edit this activity.

**Activity Scheduler**

Start Date: 12/20/2023  Recurring? 

Frequency: Daily - Every Week

Planned End Date: 01/20/2024

Hours Per Day: 2.0

- Step 29:** Change the **Planned End Date** to a date one month from today and change the **Hours Per Day** to 2.0.
- Step 30:** Click Save.
- Step 31:** Click + Add Activity.
- Step 32:** Select HE – HSE (HIGH SCHOOL EQUIVALENCY DIPLOMA) as the **Activity**.
- Step 33:** Enter REGISTER FOR HSED COURSES as the **Activity Description**.



- Step 34:** The **Location** is Off-site. Enter your local Technical College's information for the **Business Name, Location, Street Address, Zip, and Phone Number**.
- Step 35:** Scroll down to the **Activity Scheduler** section. Enter Friday's date as the **Start Date**. Do not check the RECURRING? checkbox.
- Step 36:** For **Hours Per Day**, enter 1.0.
- Step 37:** Enter a **Begin Time** of 11:30 AM and an **End Time** of 12:30 PM.
- Step 38:** Click Save.
- Step 39:** Click + Add Activity.
- Step 40:** Select WE – WORK EXPERIENCE as the **Activity**.
- Step 41:** Enter COMPLETE WORK EXPERIENCE AT OUR NEIGHBORS. WORK DUTIES FOCUS ON BASIC OFFICE SKILLS as the **Activity Description**.
- Step 42:** The **Location** is Off-site. Enter OUR NEIGHBORS for the **Business Name**. Make up a **Location, Street Address, Zip, and Phone Number**.
- Step 43:** Carmen has a worksite supervisor who is the **Activity Contact**. Click the + button to add her as a contact. (Be sure to click the + button and not the + Add Contact button, as this button adds additional contacts.)
- Step 44:** Select WORK SITE PROVIDER from the **Contact Title** dropdown.
- Step 45:** Enter SHONDA SUPERVISOR as the **Name**, SHONDAS@OURNEIGHBORS.COM as the **Email**, and 920-555-1111 as the **Phone**.
- Step 46:** Carmen signs a Release of Information (ROI) for you to communicate with the worksite supervisor. Check the ROI SIGNED box and enter today's date.
- Step 47:** Click Save.
- Step 48:** Scroll down to the **Activity Scheduler** section. Enter today's date for the **Start Date**. Check the RECURRING? checkbox.

- Step 49:** Select DAILY – EVERY WEEKDAY for the **Frequency**.
- Step 50:** Enter a **Planned End Date** of one month from today.
- Step 51:** Enter 3.0 for **Hours Per Day**, 1:00 PM for **Begin Time**, and 4:00 PM for **End Time**.
- Step 52:** Click Save.
- Step 53:** Click + Add Activity.
- Step 54:** Select CE – CAREER PLANNING AND COUNSELING as the **Activity**.
- Step 55:** Enter MEET WITH EDUCATION NAVIGATOR TO DISCUSS PROGRESS TOWARD HSED AND TO GET ASSISTANCE IN PREPARING FOR YOUR HSED TESTS as the **Activity Description**.
- Step 56:** The **Location** is On-Site. Enter your agency’s information for the **Business Name, Location, Street Address, Zip, and Phone Number**.
- Step 57:** Select Edna Navigator as the **Activity Contact**.
- Step 58:** Scroll down to the **Activity Scheduler** section. Enter next Friday’s date for the **Start Date**. Check the RECURRING? checkbox.
- Step 59:** Select WEEKLY for the **Frequency** and FRIDAY as the **Days (Select all that apply.)**.
- Step 60:** Enter a **Planned End Date** of one month from today.
- Step 61:** Enter 1.0 for **Hours Per Day**, 11:30 AM for **Begin Time**, and 12:30 PM for **End Time**.
- Step 62:** Click Save.
- Step 63:** Click on the “Complete online typing lessons” activity to edit this activity.
- Step 64:** Change the **Planned End Date** to six days after today and click Save.  
**Note:** When layering activities to end/start later in an EP period on a real case, you use the actual date of the last time this activity would occur based on the activity schedule.

- Step 65:** Click on the “Attend job readiness essentials workshops” activity to edit this activity.  
**Note:** On a real case, you use the actual date of the last time this activity would occur based on the activity schedule
- Step 66:** Repeat Step 64 for this activity.
- Step 67:** Click + Add Activity.
- Step 68:** Select HE – HSE (HIGH SCHOOL EQUIVALENCY DIPLOMA) as the **Activity**.
- Step 69:** Enter ATTEND HSED PREP CLASSES as the **Activity Description**.
- Step 70:** The **Location** is Off-site. Enter your local Technical College’s information for the **Business Name, Location, Street Address, Zip, and Phone Number**.
- Step 71:** Scroll down to the **Activity Scheduler** section. Enter a **Start Date** of one week from today. Check the RECURRING? checkbox.  
**Note:** On a real case, you use the actual date of the first time this activity would occur based on the activity schedule.
- Step 72:** Select WEEKLY for the **Frequency** and MONDAY and WEDNESDAY as the **Days (Select all that apply.)**.
- Step 73:** Enter a **Planned End Date** of one month from today.
- Step 74:** For **Hours Per Day**, enter 2.5, and 10:00 AM as the **Begin Time** with 12:30 PM as an **End Time**.
- Step 75:** Click Save.
- Step 76:** Click + Add Activity.
- Step 77:** Select HE – HSE (HIGH SCHOOL EQUIVALENCY DIPLOMA) as the **Activity**.
- Step 78:** Enter INDIVIDUAL STUDY TIME FOR HSED PREP CLASSES as the **Activity Description**.
- Step 79:** The **Location** is Off-site. Enter your HOME, LIBRARY, OR TECHNICAL COLLEGE for the **Business Name**.
- Step 80:** Scroll down to the **Activity Scheduler** section. Enter a **Start Date** of one week from today. Check the RECURRING? checkbox.

- Step 81:** Select WEEKLY for the **Frequency** and THURSDAY as the **Days (Select all that apply.)**
- Step 82:** Enter a **Planned End Date** of one month from today.
- Step 83:** For **Hours Per Day**, enter 3.0.
- Step 84:** Click Save.
- Step 85:** Click + Continue to save and navigate to the **Supportive Services** page.
- Step 86:** Click + Add Supportive Service. Select TRANSPORTATION FUNDING from the **Service** dropdown and enter GAS VOUCHERS PROVIDED TO COMPLETE ASSIGNED ACTIVITIES in the **Details** field.
- Step 87:** Click + Exit to go to the **Employability Plan** page summary.
- Step 88:** Click the View Calendar button to review a calendar of Carmen's assigned activities.
- Step 89:** Click the Exit button to navigate back to the **Employability Plan Summary** page.



Do **not** submit Carmen's EP. A trainer will tell you when to submit the EP. Continue to Step 90.

- Step 90:** From the **Case Management** navigation toolbar, select **PIN Comments**.
- Step 91:** Enter comments that capture the rest of your appointment with Carmen, including any action items that were completed or added, the discussion on her progress, changes to her Employability Plan.
  - Select **Comment Type** EMPLOYABILITY PLAN/ACTIVITY ASSIGNMENT.
  - Example: *We updated Carmen's EP at today's appointment. Prior to today's appointment, Carmen completed the TABE, her career assessments, and work experience orientation; set up child care; and made an appointment with Section 8 housing. I marked the WI Shares and housing Action Needed items as complete. I marked the TABE-related goal steps complete for her Other Program Goal, and the career assessment goal step*

*complete for her Primary Employment Goal. I ended the TABE, career assessment, work experience orientation, and child care activities. Carmen applied for several clerical positions and called the employers to follow up on her applications, but has not gotten an interview yet. She will continue to work with the Job Developer 3 hours a week, with an added focus of creating a resume and cover letter. She still wants to attend Job Club 3 hours a week, as she hopes that it will increase her chances of getting interviews. Additionally, she will continue to look for and apply to positions, but we reduced this to 10 hours a week at Carmen's request. Carmen thinks that she will reach her typing goal within the next week. She also says she isn't getting much out of Job Readiness Essentials. She wants to attend the next sessions, which focus on assertiveness, and then she wants the activity to end. I updated both planned end dates accordingly. The results of Carmen's TABE show she is ready to register for HSED classes. She is assigned 1 hour of registering for classes this week. Starting next week, she will attend HSED classes 5 hours a week, study for classes 3 hours a week, and meet with the Education Navigator to discuss her progress toward her HSED 1 hour a week. Carmen's career assessments aligned with her Primary Employment Goal of a receptionist position. She does not have experience in this field, so I assigned her 15 hours a week of work experience at Our Neighbors to gain clerical experience. I provided Carmen gas vouchers so she can complete her assigned activities.*



- Send an email to [PTTTrainingSupp@wisconsin.gov](mailto:PTTTrainingSupp@wisconsin.gov) with:
- the subject line “**Carmen Changes at Next Appointment,**” and
  - Carmen’s PIN.

A trainer will review your entries and provide feedback. Use the feedback you receive to assist you in making edits to this section of the Carmen case prior to moving on to Haylee’s case.

# Haylee

## Changes at Next Appointment

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Haylee's CMC placement is ending due to Sophia reaching 8 weeks of age. Haylee returns her Mental Health Report. The information provided by the medical professional, Dr. Jane Jones, indicates that Haylee is expected to meet with Dr. Jones weekly. Her mental health diagnosis manifests through sleep disturbance, decreased energy, and social withdrawal. These symptoms are expected to continue for six months to a year. However, Dr. Jones indicates that participation in employment activities can occur with accommodations provided for fatigue and stress. She recommends re-assessment in six months.

You ask Haylee about the Need to Care for Disabled Family Member form you provided at her initial informal assessment. She states that she gave it to Parker's doctor at his last appointment, but the doctor has not yet completed it. Based on the formal and informal assessment results, you determine that Haylee is appropriate for a W-2 T placement due to her and her son's barriers.

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

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

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

Haylee feels ok when it comes to submitting online forms, but does not have a lot of experience with online applications. She does not have a resume or cover letter, and does not know where to begin in developing one. Haylee always has completed an application without having to submit a resume. Although she has personal references,

she does not have professional references, and is unsure who to ask. All her documents are in order.

Haylee does not really remember her last interview, but she got the job. Haylee does use Facebook frequently. She does not think there is anything on there that would be a concern, but she does not know for sure. She does have one nicer outfit that she could wear for an interview, but is unsure if it still fits.

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

# Entries

## WWP

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

Referral Date: 05/15/2020  Referral Declined Details

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

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

Details

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

[B] No Contact Selected + Q

- Step 2:** Add **Formal Assessment** details.
  - Use the Magnifying Glass search feature to select Haylee’s treatment provider from the list of contacts.
- Step 3:** Add **Accommodations** for FATIGUE/WEAKNESS and STRESS MANAGEMENT.
  - If you’re not sure what accommodations to provide Haylee, check out the Job Accommodation Network, [askJAN.org](http://askJAN.org), for ideas.
- Step 4:** Click Save and Exit.
- Step 5:** From this page, click + Add PIN Comment.
- Step 6:** Enter comments that reflect Haylee’s formal assessment information.
  - Remember, PIN comments are not confidential.
  - Use the Comment Type – General.



- Step 7:** Complete a new informal assessment, by clicking the New Assessment button.
  - Update the **Work History** page to indicate that Haylee has completed a career assessment.
  - On the **Family Barriers** page, mark the Provide Need to Care form item as complete.
  - On the **Participant Barriers** page, select Yes to Display Next Section?, and answer the Domestic Violence questions.Be sure to visit all pages in the informal assessment, save them, and Submit the informal assessment when finished.
- Step 8:** Click + Add PIN Comment and add comments that summarize any new assessment information.
- Step 10:** Record her career assessment results on the **Career Assessment** page.
  - Refer back to Haylee's scenario for specific types of careers she is interested in and how those could be a match.
  - Be specific on how these assessment results are being implemented in her goals and activities.
- Step 11:** Click + Add PIN Comment and summarize her career assessment.
- Step 12:** Navigate to Haylee's **Job Readiness** page.
- Step 13:** Record Haylee's responses to the **History Questions, Application Questions, and Interview Questions.**
  - Refer back to her scenario, and include specific information in the **Details** fields.
  - Check Refer for Clothing Resources as **Action Needed.**
  - Edit the task.
  - In the **Task** field, enter PROVIDE HAYLEE WITH REFERRAL INFORMATION.
  - Indicate a **Due Date** of one week from today.
  - Enter **Details.**
  - Click Save.
- Step 14:** Click Save.
- Step 15:** You are now on the **Participant Summary** page. From this page, click + Add PIN Comment.
- Step 16:** Enter comments summarizing Haylee's job readiness.

**CWW**

- Step 1:** Update Haylee's placement on the **W-2 Placement** page.
- Step 2:** Enter comments on the **Case Comments** page indicating the placement change.

**WWP**

- Step 1:** Navigate to Haylee's **PIN Comments** page via the **Case Management** navigation toolbar.
  - Add a comment about the placement change and the rationale behind your placement decision.
- Step 2:** Navigate to Haylee's **Employability Plans** page. Create a new EP for Haylee.
- Step 3:** Review Haylee's goals and record any new goals.
  - Remember to check any completed **Goal Steps** as Completed?.
- Step 4:** End Haylee's Elapsed Activity. This includes her Mental Health Assessment activity which she successfully completed.
- Step 5:** Update her activities to reflect her current situation and level of participation.
  - Update the **Planned End Date** and/or **Hours** of activities she is continuing.
  - Add new activities as needed, including getting the Need to Care for a Disabled Child form completed.
  - Include any necessary Supportive Services.



Do **not** submit Haylee's EP. A trainer will tell you when to submit the EP. Continue to Step 6.

- Step 6:** Document all changes and the rationale behind these changes in **PIN Comments**.
  - Be sure to include that her Participation Status ended and any updates to Haylee's Employability Plan.





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

- the subject line “**Haylee Changes at Next Appointment,**” and
- Haylee’s PIN.

A trainer will review your entries and provide feedback. Use the feedback you receive to assist you in completing this section of Haylee’s case.