System Entry Guide: Ongoing Part Two

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 account for changes in participant circumstances.
- Record updates of participants' ongoing changes.

Table of Contents

INTRODUCTION **3**

Instructions for Using this Entry Guide 3
Symbols and Icons 4

ONGOING PROCESSES **5**

CARMEN **6**

Participation Tracking 6
Entries 6

HAYLEE **11**

Person Add 11
Entries 12
Luka's Informal Assessment and Two-Parent Placement Change 15
Entries 16
Luka's Employability Plan 18
Entries 18

W-2 Contact Information

Questions regarding this training material should be directed via your local agency process to the Partner Training Team,
Email: PTTTrainingSupp@wisconsin.gov
A contact person is available to answer e-mailed questions related to this training material, assist you in completing any activity that you are having difficulty with, and/or provide explanation of anything else about this training material.

Questions regarding W-2 production cases and systems should be directed via your local agency process to the BWF Work Programs Help Desk at:
Email: bwfworkprogramshd@wisconsin.gov
Telephone: (608) 422-7900.
W-2 Policy questions should be directed to your Regional Office staff.

DCF is an equal opportunity employer and service provider. If you have a disability and need information in an alternate format, or need it translated to another language, please contact (608) 535-3665 or the Wisconsin Relay Service (WRS) – 711.

For civil rights questions call (608) 422-6889 or the Wisconsin Relay Service (WRS) – 711.

Introduction

You created a subsequent EP, completed a Participation Status, and made updates to your cases based on changes that occurred at an ongoing appointment.

This System Entry Guide helps you in processing: participation tracking and two parent groups. The screenshots show examples of what can be added, your entries may be different.

Instructions for Using this Entry Guide

1. Print a copy of this System Entry Guide: Ongoing Part Two.
2. When you see the stop sign, follow the instructions for submitting your case to the Partner Training Team at 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.

Symbols and Icons

System Icons		CARES Worker Web (CWW)
		Wisconsin Work Programs (WWP)
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
		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 must complete the following for the Ongoing Processes portion of Initial New Worker Training.

Complete in the Learning Center:	Make Entries in CWW and/or WWP:
Ongoing Processes: Part Two ☐ W-2 Participation: Policy and Tracking CBT	**Ongoing Processes: Part Two** ☐ Entry Guide: Ongoing Processes Part Two Case Name PIN Carmen _____ ☐ Participation Tracking Case Name PIN Haylee _____ ☐ Person Add ☐ Luka's Informal Assessment and Two-Parent Placement Change Luka _____ ☐ Luka's Employability Plan

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

Contact the Partner Training Team with any questions or concerns at PTTTrainingSupp@wisconsin.gov.

Carmen

Participation Tracking

Carmen missed one day of employment search and work experience due to illness. She leaves messages with you and her work site supervisor. You follow up with Carmen. She explains that she has some type of stomach bug. Lucia is home from school with it, too. Carmen does not have a pattern of absences. She also called prior to her shift starting at the work experience site. Using your discretion, you grant good cause for the missed hours.

A few days later, you get an attendance log from the Job Club facilitator. You notice that Carmen did not attend one day. You follow up with the Job Club facilitator, who has not heard from her. You contact Carmen and have a conversation about this. Carmen tells you she just doesn't want to attend any more. You explain that not wanting to attend any more does not constitute good cause. Carmen would like to find something else to do instead, maybe something online again. You suggest the GCF Global website and starting with the business communication classes, which could help with work in an office setting. Carmen agrees to this for now with the understanding that that the two of you can discuss different activities in more detail at her next appointment. During the conversation Carmen confirms she has completed her typing activity, reaching her goal, and she attended the last essentials workshop. She is also registered for the HSED courses. You tell her you will update her EP for her to sign in ACCESS.

The next day, Carmen drops off her activity logs for you. She completed all of her other activities as assigned for this week up until today.

Entries

WWP

- ☐ **Step 1:** Navigate to the **Employability Plans** page via the **Case Management** navigation toolbar. Click + New Employability Plan.
- ☐ **Step 2:** Enter the **EP Begin Date** as today and **EP End Date** as one month from today.
- ☐ **Step 3:** Navigate to **Goals** page. Click on Carmen's **Primary Employment** goal of Receptionist.
- ☐ **Step 4:** Click **Completed?** for the **Goal Step** "Increase typing speed to 70 WPM."
- ☐ **Step 5** Click Save.

- ☐ **Step 6:** Click on Carmen's **Other Program Goal** of **Obtain HSED**.
- ☐ **Step 7:** Click **Completed?** for the **Goal Step** "Register for HSED Classes at the Local Tech School within one month."
- ☐ **Step 8:** Click Save.
- ☐ **Step 9:** Navigate to the **Elapsed Activities** page. Select A – SUCCESSFULLY COMPLETED for any activities listed on this page.
- ☐ **Step 10:** Click + Continue to navigate to **Activities** page. Select Carmen's Job Club activity.
- ☐ **Step 11:** Scroll to the bottom of the page and check the End Activity? box.
- ☐ **Step 12:** Enter a **Completion Reason** of K – Failed to participate – not good cause and today's date for the **Actual End Date**. Click Save.
- ☐ **Step 13:** Click + Add Activity.
- ☐ **Step 14:** Select MO – JOB READINESS/MOTIVATION as the **Activity**.
- ☐ **Step 15:** Enter COMPLETE THE BUSINESS COMMUNICATION COURSES THROUGH GCF GLOBAL THAT FOCUS ON COMMUNICATION BASICS AND BUSINESS WRITING as the **Activity Description.**
- ☐ **Step 16:** The **Location** is Off-site. Enter your HOME for the **Business Name**.
- ☐ **Step 17:** Enter CREATE AN ACCOUNT AT HTTPS://EDU.GCFGLOBAL.ORG/EN/. MOVE ONTO THE MICROSOFT OFFICE COURSES WHEN FINISHED WITH BUSINESS COMMUNICATION for **Additional Information**.
- ☐ **Step 18:** Scroll down to the **Activity Scheduler** section. Enter a **Start Date** of tomorrow. Check the RECURRING? checkbox.
- ☐ **Step 19:** Select WEEKLY for the **Frequency** and TUESDAY as the **Days (Select all that apply.)**.
- ☐ **Step 20:** Enter a **Planned End Date** of one month from today.
- ☐ **Step 21:** For **Hours Per Day**, enter 3.0. For a **Begin Time**, enter 8:00 AM, and 11:00 AM for an **End Time**.
- ☐ **Step 22:** Click Save.

☐ **Step 23:** Update the **Planned End Date** of the following activities to match the overall end date of the EP (one month from today):

- Meet with the Job Developer (ES)
- Independent Job Search (ES)
- Work Experience (WE)
- Meet with the Education Navigator (CE)
  - If this activity hasn't started yet, also update the **Start Date** to today's date.
- Attend HSED Prep Classes (HE)
  - If this activity hasn't started yet, also update the **Start Date** to today's date.
- Individual Study Time for HSED (HE)
  - If this activity hasn't started yet, also update the **Start Date** to today's date.

Note: In a real case, enough time would have passed that these activities would have started as planned. Chances are you're moving through training at a faster pace, which is why you're updating the **Start Date** if needed.

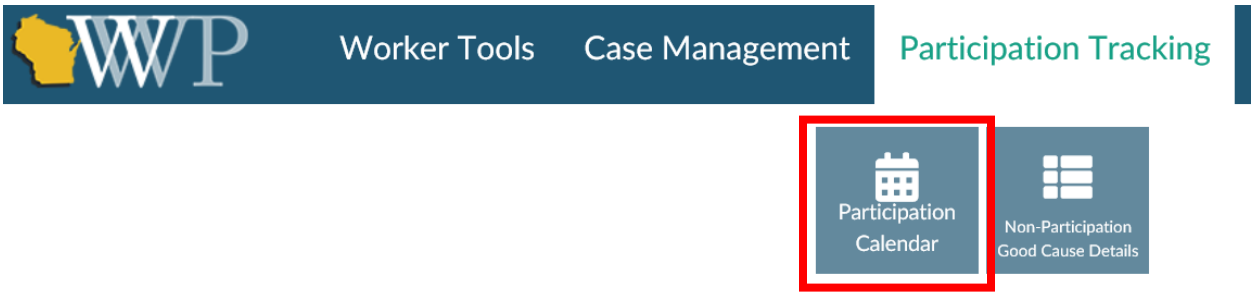
☐ **Step 24:** End the following activities as A – SUCCESSFULLY COMPLETED, using yesterday's date as the **End Date** (if not elapsed):

- Register for HSED Courses
- Complete Online Typing Lessons
- Attend Job Readiness Essentials Workshop

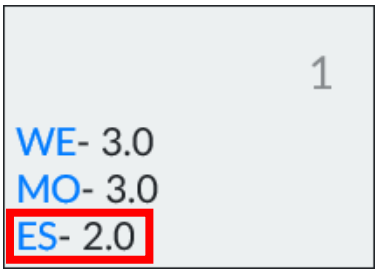
Note: In a real case, enough time would have passed that these activities would have ended as planned. Chances are you're moving through training at a faster pace, which is why you're ending them if needed.

☐ **Step 25:** Enter **Supportive Services**. Click Exit.

Do **not** submit Carmen's EP yet. A trainer will tell you when to submit the EP. Continue to Step 1 – Participation Tracking.

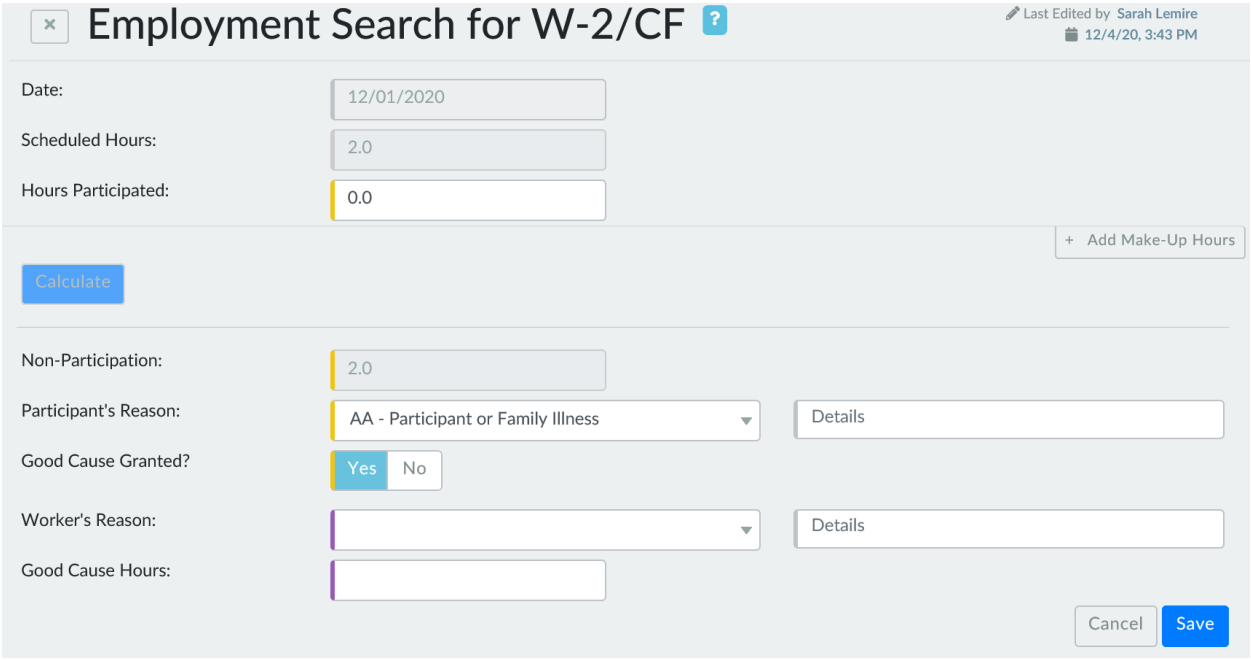


☐ **Step 1:** Navigate to Carmen's **W-2 Participation Calendar** via the **Participation Tracking** navigation toolbar.



☐ **Step 2:** Select an ES with 4 or 2 hours from the calendar.

- You can enter participation only for current or past dates. Select any ES entry that is blue. You may need to adjust dates to fit open activities.
  - In real life, you **must** enter the non-participation for the actual date it occurred.



- ☐ **Step 3:** Enter 0.0 as the **Hours Participated**.
- ☐ **Step 4:** Click Calculate.
- ☐ **Step 5:** Select the appropriate option from the **Participant's Reason** dropdown.
- ☐ **Step 6:** Select Yes for **Good Cause Granted?**
- ☐ **Step 7:** Select the appropriate option from the **Worker's Reason** dropdown. Enter appropriate **Details**.
- ☐ **Step 8:** Enter the **Good Cause Hours** as the same amount as the **Scheduled Hours** (2.0 or 4.0). Click Save.
- ☐ **Step 9:** Follow these steps to enter participation for WE.
- ☐ **Step 10:** Select an MO from the calendar.
  - If you do not have a Job Club MO activity available on the calendar because job club has not started yet, it's okay to use one from the typing practice or Essentials workshop.
    - In real life, you **must** enter the non-participation for activity code that correctly matched the assigned activity date and hours.
- ☐ **Step 11:** Enter 0.0 as the **Hours Participated**.
- ☐ **Step 12:** Click Calculate.
- ☐ **Step 13:** Select the appropriate option from the **Participant's Reason** dropdown.
- ☐ **Step 14:** Select No for **Good Cause Granted?**
  - Remember, not wanting to attend Job Club is not a good cause reason. Do not provide good cause for that activity.
- ☐ **Step 15:** Select the appropriate option from the **Worker's Reason** dropdown. Enter appropriate **Details**. Click Save.
- ☐ **Step 16:** Select any other activity code from this week.
- ☐ **Step 17:** Enter the number of SCHEDULED HOURS as the **Hours Participated**.
- ☐ **Step 18:** Click Calculate. Then, click Save.

☐ **Step 19:** Use this process to enter participation for the remainder of the activities that occurred this week.

☐ **Step 20:** Enter PIN comments regarding her participation.

- For any non-participation, you must include why the participant did not complete the activity, whether good cause was granted, and why good cause was granted or denied. When denying good cause, you must also reference the number of hours, dates, and activities missed.
- Be sure to assign the **Comment Type** of GOOD CAUSE DETERMINATION and PARTICIPATION TRACKING.
- Example: *Carmen turned in activity logs for 12/28/23-1/3/24. She did not complete 3 hours of Job Club (MO) on 1/2. I called her to ask about this and she said she didn't feel like going. This is not a good cause reason and I denied good cause. She did not complete 2 hours of job search (ES) and 3 hours of work experience (WE) on 1/3 because she was sick. This meets good cause policy and I provided good cause for these 5 hours. Carmen completed all other hours as assigned.*

☐ **Step 21:** Enter PIN comments regarding Carmen's Employability Plan updates and conversation.

Send an email to PTTTrainingSupp@wisconsin.gov with:

- the subject line "***Carmen Participation Tracking***," and
- Carmen's PIN.

A trainer will review your entries and provide feedback.

Haylee

Person Add

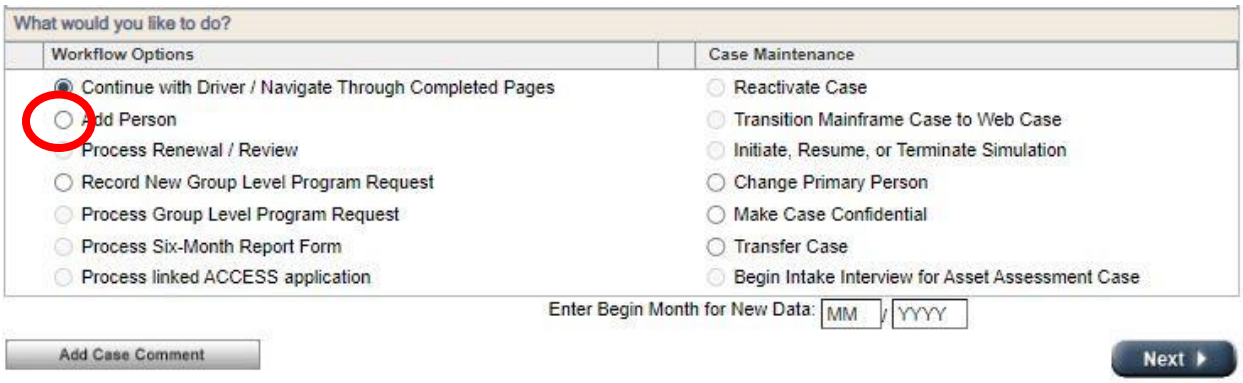
Haylee has missed three days of activities. You call her to find out what's going on. She informs you that Luka, Sophia's father, moved in with them five days ago. She says she's been busy helping him move, and she didn't complete her activities because she wanted to spend some time together as a family. She says she will resume her activities tomorrow. You schedule an appointment with Haylee and Luka for tomorrow.

At the appointment, Haylee turns in her completed activity logs. She successfully completed all activities since her placement, except for the past three days. Haylee also states she was able to get an interview outfit that fits.
You start by having a conversation with Haylee and Luka about W-2 eligibility, participation, etc. Then you add Luka to Haylee's case in CWW. Luka is 35 and provides his SSN. He and Haylee are not married. He is the legal father of Sophia. He was born in Wisconsin and has his birth certificate. Luka declines to provide his ethnicity/race. He uses his driver's license to verify his identification. His only asset is his 2012 Chevy Traverse valued at $8000. He still owes $2000 on the vehicle. He provides his vehicle title and a statement from his bank to verify the amount owed. He does not have any form of earned or unearned income.

During the appointment, Haylee returned the Need to Care for Disabled Family Member form completed by Parker's doctor. The form states that Haylee is able to participate in W-2 activities while Parker is in school, but she may need the flexibility to pick him up from school early if he is having severe behavioral issues. The doctor further explains that Parker is not able to attend daycare at this time because there are no local daycares with current openings that are equipped to adequately handle his needs. The doctor confirms that Parker needs constant supervision for his own safety.

Entries

CWW



- [ ] **Step 1:** Add Luka to Haylee's case in CWW by initiating the Add Person driver flow. Click the Add Person radio button in the **What would you like to do?** section of the **Case Summary** page.
- [ ] **Step 2:** Enter the current MM/YYYY in **Enter Begin Month for New Data**.
- [ ] **Step 3:** Click Next.
- [ ] **Step 4:** Add Luka on the **Household Members** page.
- [ ] **Step 5:** Change all the **Begin Months** and **Program Filing Dates** to the current date/month.

☐ **Step 6:** Record Luka's relationship to the other household members on the **Household Relationships** page.

☐ **Step 7:** Run Clearance and note Luka's PIN.

☐ **Step 8:** Enter all demographic information for Luka.

☐ Enter all non-financial information.
- Update the **Absent Parent** page, as Luka is now in the home and legal parentage has been established.
- Update the legal parentage status for Sophia.
- Change Refer to IV-D to No, and select the reason as HOM.

☐ **Step 10:** Enter all financial information.

☐ **Step 11:** Run eligibility. The number of times you must run eligibility with dates depends on if it is before or after Adverse Action. To determine if it is before or after Adverse Action, look at the Benefit Begin Date on the **Eligibility Run Results page**.
- If the Benefit Begin Date is next month, return to the **Initiate Eligibility** page to run eligibility with the date you are adding Luka (the date he moved in). Then run eligibility a second time without a date. Confirm the case as open and passing each time.
- If the Benefit Begin Date is two months from now, return to the **Initiate Eligibility** page to run eligibility with the date you are adding Luka (the date he moved in). Run eligibility a second time with the date of the 1st of next month. Run eligibility a third time without a date. Confirm the case as open and passing each time.

Running eligibility with dates ensures CWW knows that you want it to start considering Luka as part of the household starting today.

☐ **Step 12:** Confirm eligibility each time you run eligibility – this generates a work programs referral on the **Work Programs/Action** page.
- Confirm eligibility only if passing.

☐ **Step 13:** Record case comments on the **Case Comments** page indicating the eligibility changes that occurred.

WWP

☐ **Step 1:** Navigate to Haylee's **W-2 Participation Calendar** via the **Participation Tracking** navigation toolbar.

☐ **Step 2:** Enter participation to show that Haylee had zero hours of participation for the past three days, and full participation for all days prior to that.

☐ **Step 3:** Navigate to Haylee's **Informal Assessment** via the **Case Management** navigation toolbar and update the **Family Barriers** page to include details about the completed Need to Care for a Disabled Family Member form.

☐ **Step 4:** Navigate to Haylee's Participation Statuses app. Add the CD – CARING FOR DISABLED CHILD status.

☐ **Step 5:** Navigate to Haylee's **Job Readiness** page and update the question about the interview outfit. Navigate to the Action Needed app and complete the clothing referral item.

☐ **Step 6:** Enter PIN comments regarding Haylee's participation, including the number of hours, dates, activities, and reason for hours missed, along with your Good Cause determination.

- Be sure to select the **Comment Type** of GOOD CAUSE DETERMINATION and PARTICIPATION TRACKING.

Enter PIN comments regarding the completed Need to Care for a Disabled Family Member form, interview outfit, and Haylee's new status.

Send an email to PTTTrainingSupp@wisconsin.gov with:

- the subject line "***Haylee Person Add***," and
- Haylee's Case Number.

A trainer will review your entries and provide feedback.

Luka’s Informal Assessment and Two-Parent Placement Change

After referring Luka to work programs in WWP, you conduct an initial assessment with him. He speaks English at home, and fluently speaks Russian, but does not read or write Russian. The reason he moved in with Haylee is that he lost his job two weeks ago as a mechanic at A+ Automotive where he had worked full time for the last two years. He was responsible for things like tire rotation and repairs, oil changes, general tune-ups, and fixing worn brake pads. He states it was a good job. He earned $16.50/hour. His friend owned the business and they had an argument, which led to Luka being fired. He has never completed a career assessment.

Three years ago, Luka participated with the FSET program for about four months, but is not involved with any work programs right now. He received his High School Diploma from Green Bay West high school seventeen years ago. He has not participated in any post-secondary education. He’s always learned his previous jobs on-the-job. However, he does have some interest in receiving some type of certification in automotive repair.

Luka has no military experience. He lived at his previous apartment for two years. He paid $625.00 per month for rent. He was not evicted, but knew without a job, he could no longer afford rent payments. Luka uses his personal vehicle for transportation. His driver’s license and auto insurance are current.

Luka reports no legal issues or personal barriers to employment. Sophia is his only child. Remember, the family is receiving WIC, but not participating in Headstart.

Luka would like to stay in the automotive industry. He enjoys mechanics and working with his hands. He has experience in the field, but no formal training. As he mentioned before, he is interested in finding out about some type of certificate in automotive repair that would help him with his employment search. Luka names three companies that he could apply to right now. He doesn’t want to work for friends anymore, as he feels that just causes problems. Ideally, Luka would like to workday hours and close to home. He would be willing to travel about 20 minutes or 15 miles for work.

His phone and email are both set up to receive messages, and he does check them frequently. Luka provides you with his email address. You and Luka plan to continue the discussion of job readiness at a later appointment.

Based on your assessment information, you determine Luka is the more employable parent at this time instead of Haylee. You determine a CSJ placement is most appropriate for Luka.

Entries

WWP/Luka

- ☐ **Step 1:** Click the PIN Search tab. Look up Luka by his PIN.
- ☐ **Step 2:** Click to select Luka from the list.
- ☐ **Step 3:** Click the Enroll Participant button and enroll Luka.
- ☐ **Step 4:** Complete Luka's informal assessment.
  - If something was not expressly stated in the scenario, make it up.
- ☐ **Step 5:** Submit Luka's informal assessment in WWP.
- ☐ **Step 6:** Record **PIN Comments** summarizing Luka's informal assessment.
- ☐ **Step 7:** Enter Luka's **Job Readiness** information for the Work Preference Questions and Contact Questions sections.
  - Refer to his scenario for any specific details.
  - Click Save with Errors.
- ☐ **Step 8:** Enter **PIN Comments** summarizing Luka's job readiness.
- ☐ **Step 9:** Record **PIN Comments** for Luka summarizing your placement decision.
  - Be sure to explain why he is the placed parent.

WWP/Haylee

- ☐ **Step 1:** Record **PIN Comments** for Haylee explaining why she is no longer the placed parent.

CWW

- ☐ **Step 1:** Update the **W-2 Placement** page by selecting Luka as the **Individual** in the W-2 placement.
- ☐ **Step 2:** Select the new placement with a **Placement Begin Date** of today.
  - Do not backdate Luka's placement.
  - Do not enter a **W-2 Episode End Date** for Haylee.
- ☐ **Step 3:** Click Add. This automatically ends Haylee's placement.

☐ **Step 4:** Click Next. Complete the **W-2 Two Parent Participation** page using the current month as the **Begin Month**.

☐ **Step 5:** Answer NO to "Is a Parent a Disabled Adult for W-2?"

☐ **Step 6:** Answer NO to "Is a Parent Caring for a Severely Disabled Child in the W-2 Assistance Group?"
- Even though Parker has a disability, he is not considered a Severely Disabled Child.

☐ **Step 7:** Click Next.

☐ **Step 8:** Record placement change comments on the **Case Comments** page.

Send an email to PTTTrainingSupp@wisconsin.gov with:
- the subject line "***Luka's Informal Assessment and Two-Parent Placement Change***," and
- Luka's and Haylee's PIN.

A trainer will review your entries and provide feedback.

Luka's Employability Plan

You completed Luka's informal assessment, started his job readiness assessment, and placed him as a CSJ participant. Now it's time to develop Luka's Employability Plan with him.

Luka states he wants to find another job as a mechanic. He knows that getting an automotive repair certificate would increase his employability in the field. If he can't find a job as a mechanic, he would be willing to work as an oil change technician. He states that someday, he'd like to own his own auto repair shop. During your conversation, Luka mentions that he would like to spend more one-on-one time with Sophia.

He's anxious to start job searching as soon as possible as he wants to help Haylee with expenses. He acknowledges that he is a little rusty when it comes to making a good impression with employers since his last job was through his friend. Together, you develop Employability Plan goals and activities that include employment search, job development, career assessment, educational needs assessment, and other activities you deem appropriate.

Entries

WWP/Luka

- ☐ **Step 1:** Navigate to Luka's **Employability Plans** page from the **Case Management** navigation toolbar. Click on the + New Employability Plan button.
- ☐ **Step 2:** Complete the **Employability Plan** page overview.
- ☐ **Step 3:** Enter appropriate goals and goal steps for Luka. Be sure to include personal goals.
- ☐ **Step 4:** Add activities to his EP. Use your judgement and the information you have to choose appropriate activities.
  - Remember, CSJ participants are expected to complete 40 hours of activities per week unless their circumstances determine otherwise.
- ☐ **Step 5:** Include needed supportive services on his EP. Click Save.

Do **not** submit Luka's EP yet. A trainer will tell you when to submit the EP. Continue to PIN Comments - Step 1.

PIN Comments

☐ **Step 1:** Navigate to **PIN Comments** from the **Case Management** navigation toolbar.

☐ **Step 2:** Enter comments that summarize Luka's Employability Plan.
- Be sure to include your rationale behind Luka's activities.

Send an email to PTTTrainingSupp@wisconsin.gov with:
- the subject line "***Luka's Employability Plan***," and
- Luka's PIN.

A trainer will review your entries and provide feedback.