

# System Entry Guide: Ongoing Part Three

---

## 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.
-

## Table of Contents

<b>INTRODUCTION .....</b>	<b>3</b>
Instructions for Using this Entry Guide.....	3
Symbols and Icons .....	4
<b>ONGOING PROCESSES .....</b>	<b>5</b>
<b>CARMEN .....</b>	<b>6</b>
Carmen's Placement Change and Employment .....	6
Entries .....	6
<b>HAYLEE .....</b>	<b>16</b>
Haylee's Employment/Luka's Job Readiness .....	16
Entries .....	17
Luka's Employment.....	19
Entries .....	20

### 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 participation tracking, placement changes, and added a second parent to the W-2 group.

This System Entry Guide guides you in processing employment and retention services. 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 Three.
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.

---

# 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](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 must 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 3</b></p> <p><input type="checkbox"/> Training on Demand: Employment Page</p> <p><input type="checkbox"/> Average Hours Per Pay Period Desk Aid</p> <p><input type="checkbox"/> W-2 Supportive Services Plan</p>	<p><b>Ongoing Processes Module 3</b></p> <p><input type="checkbox"/> Entry Guide: Ongoing Processes Part Three</p> <p>Case Name <span style="float: right;">PIN</span> Carmen _____</p> <p><input type="checkbox"/> Placement Change &amp; Employment</p> <p>Case Name <span style="float: right;">PIN</span> Haylee _____</p> <p><input type="checkbox"/> Haylee's Employment</p> <p><input type="checkbox"/> Luka's Employment</p>

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



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

# Carmen

## Carmen's Placement Change and Employment

Carmen has been working on career planning and applying for jobs. She attends her appointment with you to let you know she was just offered a job with the local school district as an entry-level lunch room aide at the elementary school. She'll be working Tuesday, Wednesday, and Thursday, 8:45-2:15, which includes a 30-minute break, and earning \$12.00/hour. She gets paid weekly and will receive her first paycheck in two weeks. This job does not offer benefits. Carmen is very excited. These hours will work great in terms of childcare for Lucia. It's not what she thought she would be doing, but in working with the Job Developer, she recognizes the potential for career advancement with the school district.

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

Carmen also reports that she passed two HSED tests on Monday. She scored 155 on the Language test and 145 on the Mathematics test.

She did complete the business communication courses online through GCF Global and has started on some Microsoft Office courses. Right now, she's working on Microsoft Word.

You complete a new informal assessment in WWP, enter her employment in CWW, and change her placement to a prorated CSJ placement. You update her Employability Plan to include her work hours. She will continue working toward her HSED, meeting with the Job Developer and Education Navigator, the GCF Global courses, and employment search. The two of you work to re-arrange her activity hours and schedules around her work hours.

## Entries

### WWP

The screenshot shows a web interface for an 'Informal Assessment'. The title bar includes a back arrow, the text 'Informal Assessment', and a help icon. Below the title bar, there are two buttons: 'Edit Assessment' with a pencil icon and 'New Assessment' with a plus icon. A sidebar on the left is labeled 'Languages'. At the bottom right, there are two buttons: 'Print' with a printer icon and 'Submit' with a green arrow icon.

- Step 1:** Access Carmen's informal assessment and click New Assessment.

- Step 2:** Review Carmen’s informal assessment information on each page, making updates as needed.







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

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

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

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

Looking for Work / No Work Available
Nobody ever calls me back for an interview.

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

+ Add Work History

- Step 3:** On the **Work History** page, indicate Carmen’s employment status as Part-Time.
- Step 4:** Click + Add Work History.
- Step 5:** Enter UNSUBSIDIZED as the **Job Type**, TODAY’S DATE as the **Begin Date**, and indicate that she is currently employed.
- Step 6:** Enter LUNCH ROOM AIDE as the **Position** and the **Company** and **Location** for your local elementary school.
- Step 7:** **Job Duties** include: SETTING UP THE LUNCH ROOM AND SERVING AREA, MONITORING STUDENTS DURING THE LUNCH HOUR, TAKE DOWN OF THE LUNCH ROOM AND SERVING AREA.
- Step 8:** Enter her **Expected Schedule** as TUESDAY THROUGH THURSDAY, 8:45AM-2:15PM.
- Step 9:** Select None of the Above for **Benefits Offered**.
- Step 10:** Select Independent Job Search for **How was this job found?**

**Step 11:** Select Hourly as the **Pay Type**, and enter 15 for the **Avg Weekly Hours**. Enter the **Pay Rate** as \$12.00 per Hour.

**Step 12:** Click Save and Exit.

**Step 13:** Click + Continue

Are you working towards a GED or HSED? Yes No

+

No Test Scores

+

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

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

### Add Test Score ? ×

Test Type GED/HSED
Date Taken

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

Details

**Step 15:** Enter MONDAY'S DATE in the **Date Taken** field.

**Step 16:** Enter 155 as her **Language** score. Indicate that she passed.



- Step 17:** Enter 145 as her **Mathematics** score. Indicate that she passed.
- Step 18:** Click Save.
- Step 19:** Click + Continue.
- Step 20:** Review the remaining pages, considering any **Action Needed** items, and saving each page as you go along.
- Step 21:** Submit the informal assessment.

Do you have a current resume and a cover letter? Yes No

Now has a current resume with help from Job Developer. Has been working on cover letter and feels more confident with skills.

254 characters remaining

- Step 22:** On the **Job Readiness** page, update Carmen’s response to the **Application Question** concerning her resume and cover letter. Click Save.
- Step 23:** Enter PIN comments. Comments should indicate an informal assessment was completed, reflect Carmen’s new employment situation and what her job entails, and indicate her completed HSED tests.
  - Choose all **Comment Types** that apply.

## CWW

**Employment Gatepost** Cancel  Reset

**Effective Period**

Last Updated: 05/15/2020

**Questions**

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

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

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

- Step 1:** Navigate to Carmen’s case in CWW.
- Step 2:** On the **Employment Gatepost** page, answer Y-YES to the question, “Is anyone in your household currently employed or on strike or anyone recently been employed including goods/free rent in return for work (in-kind income, OJT, etc.)?”
- Step 3:** Click Next.

**Employment** Cancel  Reset

**Employment Information**

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

**Employer Information**

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

- Step 4:** Because this is new employment, first determine the **Begin Month**. This is the month in which she receives her first paycheck.
- Step 5:** Enter the **Begin Month**.
- Step 6:** Select the **Individual**.
- Step 7:** Enter all fields related to **Employer Information**.

**Employment Description**

\* Employee Type:       \* Job Title for Health Insurance:

\* Employment Type: R - REGULAR EMPLOYMENT      \* Verification: NQ - NOT QUESTIONABLE  
 \* Begin Date: 05 / 15 / 2020      \* Verification: AF - AGENCY FORM  
 First Pay Check Date: 05 / 29 / 2020  
 \* Employment Ended?: No  
 Employment End Date: MM / DD / YYYY      Verification:   
 Date Of Last Paycheck: MM / DD / YYYY      Verification:

**Strike Information**

\* On Strike? No  
 Strike Begin Date: MM / DD / YYYY      Verification:   
 Strike End Date: MM / DD / YYYY      Verification:

- Step 8:** Enter the **Employment Type** of R – REGULAR EMPLOYMENT. **Verification** defaults to NQ – NOT QUESTIONABLE, and that is fine.

- Step 9:** Enter the **Begin Date**, TODAY'S DATE. **Verification** is AF-AGENCY FORM.
- Step 10:** Enter the **Date of First Paycheck**, TWO WEEKS FROM TODAY.
- Step 11:** Enter NO for "Employment Ended?" and "On Strike"



**Detailed Wage Information**

**Pay Frequency**  
 \* Pay Frequency: W - WEEKLY

**Detailed Wage Information**

Rate Per Hour: \$ . Wage Type:   
 Average Hours Per Pay Period: Verification:   
 Total Amount Per Pay Period: \$ . Delete:

Reset Add

Rate Per Hour	Wage Type	Average Hours Per Pay Period	Verification	Total Amount Per Pay Period	Delete
12.00	REG - REGULAR PAY	15.00	AF - AGENCY FORM	180.00	 

- Step 12:** Enter the **Pay Frequency** as WEEKLY, **Rate Per Hour** as \$12.00, **Wage Type** as REG – REGULAR PAY, **Average Hours per Pay Period** as 15, and **Verification** as AF – AGENCY FORM.
- Step 13:** Click Add to add this employment to the dynalist.

**Totals and Comments** Calculate

Monthly In-kind Amount: \$ . Verification:   
 Total Amount Per Pay Period: \$ 180 . 00   
 Monthly MA Gross Amount: \$ 720 . 00   
 ▣ Override MA Gross Amount: \$ .   
 Monthly BC+ Pre-Tax Deductions Amount: \$ .   
 Monthly BC+ Taxable Amount: \$ 720 . 00   
 ▣ Override BC+ Taxable Amount: \$ .   
 Monthly Converted Amount: \$ 774 . 00   
Override Converted Amount: \$ 180 . 00 Verification: AF - AGENCY FORM   
 Monthly Total Hours: 65   
 Monthly Override Hours:   
 Subsidized Employment Subsidy: \$ .   
 Comment: 

started work on 5/15/20 and will not receive her first paycheck until 5/29/20. She will only receive one paycheck in May (on 5/29). Entered \$180 override (15 hours x \$12/hour = \$180.00).

 Current Size = 195 characters (240 characters max.)

Enter New Begin Month 06 2020 Go

- Step 14:** Click Calculate to populate the **Totals and Comments** section.
  - Notice that the **Monthly Converted Amount** must be overridden to account for Carmen receiving less than full pay for the month in which she begins employment. Only the amount she will receive should be budgeted.
- Step 15:** Calculate the amount of income Carmen will receive in the month she begins work. Enter the amount in the **Override Converted Amount** field with **Verification** as AF – Agency Form.
- Step 16:** Enter comments in the **Comment** box to explain how you calculated the **Override Converted Amount**.
- Step 17:** In the Date Navigator below the **Totals and Comments** section, enter the following month for the **New Begin Month**. Click Go.
  - Note that because this is a new job, multiple instances of the **Employment** page must be entered.

Employment Information			
Effective Period			
* Begin Month:	<input type="text" value="06"/> / <input type="text" value="2020"/>	End Month:	<input type="text" value="MM"/> / <input type="text" value="YYYY"/>
Delete Reason:		<input type="text"/> <input type="button" value="v"/> <input type="button" value="≡"/>	
Last Updated:			

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

**Totals and Comments** Calculate

Monthly In-kind Amount: \$  .  Verification:  ▼

Total Amount Per Pay Period: \$  .

Monthly MA Gross Amount: \$  .

▣ Override MA Gross Amount: \$  .  ▣ Verification:  ▼

Monthly BC+ Pre-Tax Deductions Amount: \$  .

Monthly BC+ Taxable Amount: \$  .

▣ Override BC+ Taxable Amount: \$  .  ▣ Verification:  ▼

Monthly Converted Amount: \$  .

**Override Converted Amount: \$  .  Verification:  ▼**

Monthly Total Hours:

Monthly Override Hours:

Subsidized Employment Subsidy: \$  .

Comment: 

started work on 5/15/20 and will not receive her first paycheck until 5/29/20. She will receive full pay June forward. (15 hours x \$12/hour = \$180/week. Paid weekly. \$180 x 4.3 = \$774)

Current Size = 193 characters (240 characters max.)

- Step 19:** Scroll down to the **Totals and Comments** section and delete the **Override Converted Amount**. Remove the **Verification**.
- Step 20:** Enter **Comments** explaining why you have removed the override.
- Step 21:** Click Next.

**Employment Summary Details**

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

Close

- Step 22:** These actions correctly budget the first month as partial income and the following months with full income. This can be viewed on the **Employment Summary Details** page. To access this page, from the Navigation Menu, click Employment. Then click Summary. Next, click the clock icon.

- Step 23:** Click Close. Click Next and complete the **Generate Summary** page. Click Next.

**Initiate Eligibility**
Cancel

---

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

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

---

**What would you like to do?**

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

Run Eligibility with Date
  Determine Potential FoodShare Supplement

Effective:  /  /

---

Cancel

- Step 24:** Select Run Eligibility to run eligibility without dates.
- Note if the Benefit Begin Date is one month out or two months out.
  - Confirm only if passing.
- Step 25:** Select Run Eligibility with Date.
- If the Benefit Begin Date was two months out, you'll need to run with a date twice (today's date and the 1<sup>st</sup> of next month).
  - Confirm only if passing.
- Step 26:** Place Carmen into a ½ CSJ (CS2) placement on the **W-2 Placement** page effective today.
- Step 27:** Enter **Case Comments** related to the new employment, eligibility results, and change in placement.
- Example: *Carmen reported that she starts a part-time job at Clay Lamberton Elementary School today. She'll be working 15 hours a week and earning \$12 an hour. I verified her employment with an agency form and added the job to the Employment page. Her case remains open and passing. I updated her placement to CS2 as of today's date.*

## WWP

- Step 1:** Create a new EP for Carmen.
- Step 2:** Review Carmen's goals and record any new goals.
- Remember to check any completed **Goal Steps** as Completed?

**Employability Plan** ?

Employability Plan  
Goals  
Employments  
Elapsed Activities  
Activities  
Supportive Services

**Employments**

Job Type	Job Begin Date
Unsubsidized	12/15/2020
Position	Job End Date
Lunch Room Aide	
<input type="checkbox"/> Company/Organization Name	Avg Weekly Hours
Riverview Elementary School	15
Company/Organization Location	
526 South Water Street Wautoma, WI 54982	

Save + Continue

**Step 3:** Check the box next to Carmen's new job to include her employment on her EP.

**Step 4:** Update her activities to reflect her current situation and level of participation. End any activities she is no longer completing. Update the Planned End Date, Days of the week, and/or Hours of activities she is continuing. Add new activities as needed. Her activities should include:

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

**Step 5:** Add appropriate supportive services.



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

- Step 6:** Enter PIN comments. Comments should reflect Carmen's placement change, updated EP, and retention services being offered.
- Select the INFORMAL ASSESSMENT, EMPLOYABILITY PLAN/ACTIVITY ASSIGNMENT, PLACEMENT DETERMINATION, and EMPLOYMENT **Comment Types**.
  - Example: *Carmen got a part-time job at Clay Lamberton Elementary School as a Lunch Room Aide doing lunch room set up/take down and serving. She'll be working 15 hours a week (Tuesday through Thursday 8:45-2:15) and earning \$12 an hour. Carmen is excited about this job because the hours work well for Lucia's childcare. The position is not what she thought she'd be doing, but she knows there is room for potential advancement. I completed a new informal assessment with her. Carmen also passed her first set of HSED tests on Monday. She scored 155 in Language and 145 in Math. Additionally, she now has a resume/cover letter. She reports no other changes. I updated Carmen's placement to CS2 as of today's date. We will continue to help Carmen find more stable, year round employment as she works part-time and pursues her HSED.*



- Send an email to [PTTTrainingSupp@wisconsin.gov](mailto:PTTTrainingSupp@wisconsin.gov) with:
- the subject line "**Carmen Placement Change and Employment**," and
  - Carmen's PIN.

A trainer will review your entries and provide feedback.

## Haylee

### Haylee's Employment/Luka's Job Readiness

Haylee starts a part time job at Parker's school in the office today. She is working 10 hours per week, and earning \$13.50 per hour as an Office Support Specialist. Her expected schedule is Tuesdays and Thursdays from 10am to 3pm. This job does not



provide benefits. She is paid weekly, and will receive her first paycheck in two weeks, which you verified with an agency form. Haylee is excited because she'll be able to be close to Parker. The best part is that she'll be dealing with collecting lunch fund monies, so she'll be working with numbers. She still is completing other activities, but is unlikely to increase her hours/wages. Her supervisor's name is Ally Larson, and her phone number is 888-555-2354. Luka remains the parent placed.

You and Luka continue assessing his job readiness. He really liked his last job at A+ Automotive until he had that fight with his friend. At that job, he was starting to rebuild an engine. Luka was very proud of his work on that, and was disappointed he never got to finish. He feels he can offer his future employer loyalty, punctuality, and a good work ethic. He knows he needs to work on his attitude.

Luka has submitted online applications before, but hasn't received any call backs. He is unsure if he is doing something wrong. For most automotive jobs, he has always submitted only an application. He's never needed to have a resume or cover letter. Luka has professional references he can use. All of his necessary documents are current.

Luka's last interview was at A+ Automotive, and his friend was the one interviewing him. Luka doesn't feel it was a true interview. It's been a while since he has had to prepare for one. He does use Twitter occasionally, but does not tweet anything that would be concerning to an employer. He does have nice work clothes he could wear for an interview. When you ask Luka about this, he states he has a nice pair of jeans and a polo shirt, but only has tennis shoes. You discuss possible interview outfits for an automotive interview, and provide a referral to clothing resources.

## Entries

### CWW

- Step 1:** On the **Employment Gatepost** page, indicate that someone in the household is working.
  
- Step 2:** Enter Haylee's job on the **Employment** page. Remember, you need to enter multiple months; showing the **Override Converted Amount** for the current month, and the total monthly amount for next month.
  
- Step 3:** Run eligibility.
  - Remember to run with dates as many times as needed.
  
- Step 4:** Record comments on the **Case Comments** page detailing the change.

**WWP**

- Step 1:** Enter Haylee's job in the Work History app and update her **Employment Status** on the **Work History** page.
  - Include her supervisor as a contact.
- Step 2:** 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:** Check the box next to Haylee's new job to include her employment on her EP.
- Step 5:** Update her activities to reflect her current situation and level of participation.
  - End any activities she is no longer completing, including getting the Need to Care for a Disabled Child form activity.
  - Update the **Planned End Date** and/or **Hours** of activities she is continuing.
  - Add new activities as needed.
  - Do not schedule any activities during her work hours.
  - Remember to include Supportive Services needed for Haylee to complete her assigned activities.



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

- Step 6:** Document all of Haylee's changes in **PIN Comments**.
- Step 7:** Record Luka's job readiness information on his **Job Readiness** page. Click Save.
- Step 8:** Click + Add PIN Comment and summarize Luka's job readiness.





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

- the subject line “**Haylee Employment/Luka Job Readiness**,”
- Haylee’s Case Number, and
- Haylee’s and Luka’s PINs.

A trainer will review your entries and provide feedback.

## Luka’s Employment

---

A short time later, Luka finds full-time employment at an express lube and oil change shop as an Automotive Lube Technician. He will be earning \$15.00 per hour and be paid bi-weekly, which you verify with an agency form. His duties will include conducting basic oil changes. Luka will receive his first paycheck in three weeks. At this time, the job does not include benefits, but Luka hopes that will change in the future. He provides his supervisor’s contact information as Jason Young [jasony@expresslube.com](mailto:jasony@expresslube.com).

The two of you review the results of his Career Locker career assessments and TABE scores. Luka’s skills include diagnostic, technical, problem-solving, and practical skills. He enjoys working in environments where he can use analytical skills, work with his hands, and be in a team environment. Potential career matches included machinist and automotive technician. This fits his desire to work with his hands on machines. The TABE shows his Math score as 610 and his Reading score as 516.

You complete an informal assessment with Luka, and determine he is appropriate for a CMF+ placement. You update his placement, offer retention services, and offer to complete a Supportive Service Plan. He agrees to both. You add the retention services to his Employability Plan and discuss where he may need some additional support.

Luka mentions that he has never budgeted for more than one person, and he is concerned about budgeting his new income for an entire family. You provide him with the contact information for the Family Living Educator at the UW – Extension office and inform him that they offer a Managing Your Money workshop series on Thursday nights. Additionally, you offer to complete a budget with Luka based on his prospective income and expenses at his next appointment, which he accepts. You discuss the importance of maintaining and updating the budget on a monthly basis to ensure long-term success. Luka still wants to pursue a mechanic certification. You provide him with the contact information for the WIOA program and for a career coach at the local tech school. You and Luka identify there are several steps he needs to take in the short term to achieve his goal. They include looking into mechanic certifications, taking the Accuplacer, talking with an admissions counselor, and researching financial aid options at the school, and talking with his employer to see if they offer continuing education assistance. Luka identifies no other needs at this time.

## Entries

### CWW

- Step 1:** Enter Luka's job on the **Employment** page.
  - Click the Add New Information button to create a page for Luka's job.

The screenshot shows a software interface with a navigation bar. The bar contains several icons and a date field labeled 'Sequence Updated on or before' with a 'Go' button. A red box highlights the 'Add New Information' button, which is a green plus sign inside a circle. Below the navigation bar, there are buttons for 'Add Case Comment', 'Cancel', 'Previous', and 'Next'.

- Step 2:** Run eligibility.
  - When running eligibility, click the Ignore W-2 Income and Asset Test to allow CMF/+ Placement to begin checkbox on the **Initiate Eligibility** page.
  - Confirm only if passing.
- Step 3:** Change Luka's placement on the **W-2 Placement** page to CMF+.
- Step 4:** Document these changes on the **Case Comments** page.

### WWP

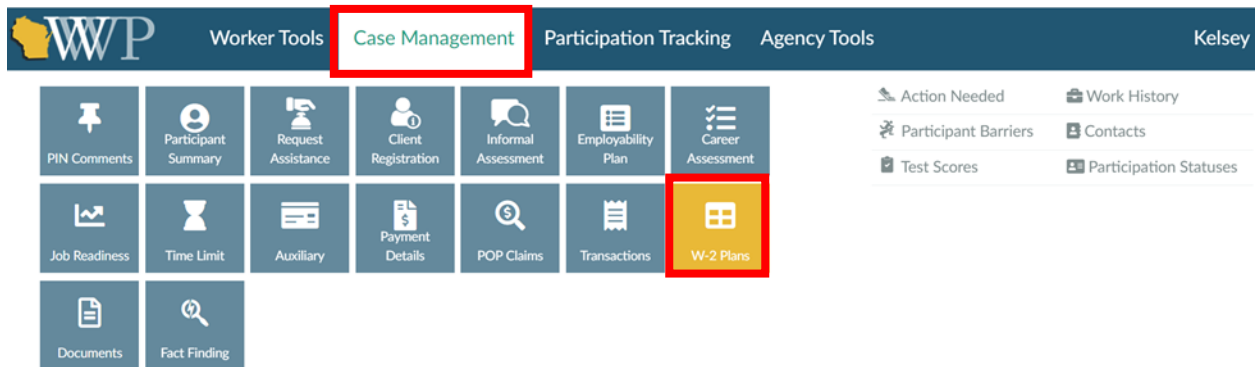
- Step 1:** Complete a new informal assessment with Luka.
- Step 2:** Update Luka's **Work History** page.
  - Document his new employment.
  - Indicate that he has completed a Career Assessment.
  - Click + Add PIN Comment from this page. Record information about Luka's employment situation.
- Step 3:** Record his career assessment information on the **Career Assessment** page.
- Step 4:** Click + Add PIN Comment and summarize Luka's career assessment.
- Step 5:** Record Luka's TABE scores in the Test Scores app.
- Step 6:** Click + Add PIN Comment and summarize Luka's TABE scores.
- Step 7:** Create a new EP for Luka.

- Review his goals, complete any **Goal Steps** if needed, and record any new goals.
- Check the box next to his new job to include his employment on his EP.
- Update his activities to reflect his current situation and level of participation.
  - End the career assessment and TABE test activities with a **Completion Reason** of A – SUCCESSFULLY COMPLETED. End the other activities with a **Completion Reason** of N – ACTIVITY ENDED DUE TO CMF PLACEMENT/EMPLOYMENT
  - Be sure to add the job retention activity. This is the only activity he can be assigned because he is working 40 hours/week.
- Include appropriate supportive services.



Do **not** submit Luka’s EP yet. A trainer will tell you when to submit the EP. Continue to Step 8.

- Step 8:** Enter PIN Comments summarizing Luka’s employment, placement, and Employability Plan updates.



- Step 9:** Click on **Case Management** to open the toolbar.
- Step 10:** Click on the W-2 Plans button.

**Step 11:** Click on the + Add Supportive Service Plan button.

**Step 12:** Luka does not have any **Emergency Needs**. Check the Not Needed box.

**Step 13:** Click the + Continue button.

**Step 14:** Repeat steps 4 and 5 for **Employment Support Needs, Housing Needs, and Access to Economic Supports**.

<<

## Edit Supportive Service Plan

CARMEN CHAPPA  
8206296590

- Emergency Needs ✓
- Employment Support Needs ✓
- Housing Needs ✓
- Access to Economic Supports ✓
- Money Management Needs
- Child Care Needs
- Transportation Needs
- Legal Assistance Needs
- Education and Training Needs
- Health Care Needs
- Other Needs

### Money Management Needs Not Needed

Resources

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

203 characters remaining

[+ Add Resource](#)

Short Term Plan Of Action

Work with FEP at next appointment to determine prospective income and create a budget. Bring a list of all your expenses with you to the appointment.

750 characters remaining

Long Term Plan Of Action

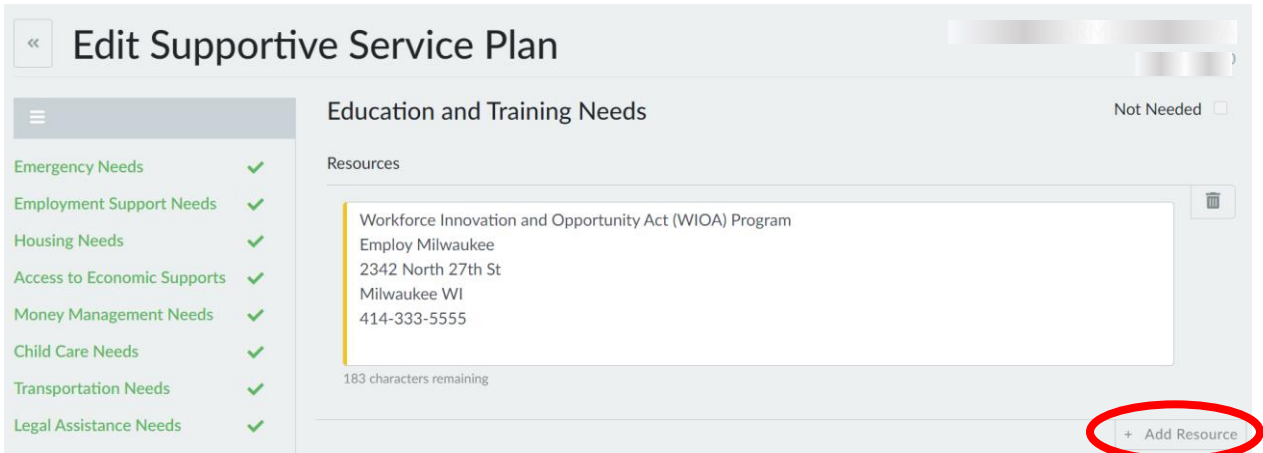
Register for and complete the Managing Your Money Workshop series at the UW - Extension office.

Maintain and update your budget on a monthly basis.

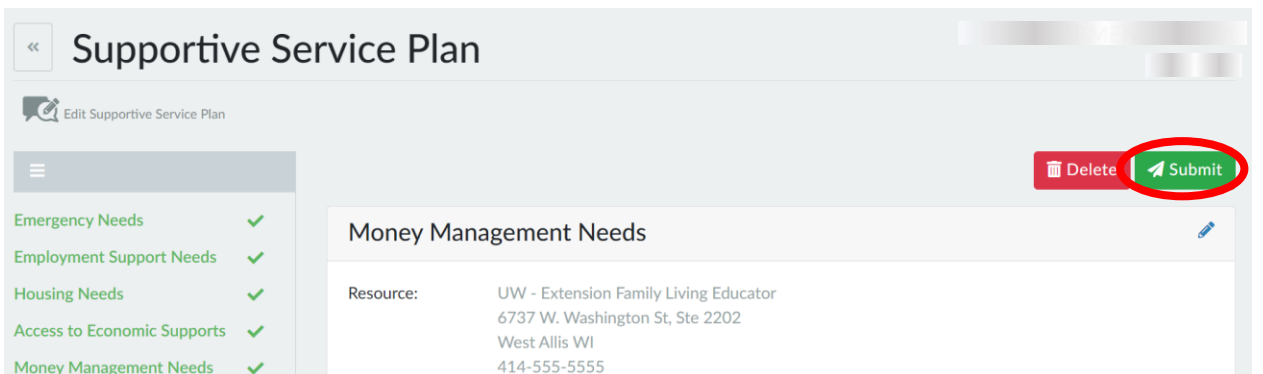
752 characters remaining

Save + Continue

- Step 15:** Luka has **Money Management Needs**. In the **Resources** field, enter UW – EXTENSION FAMILY LIVING EDUCATOR; 6737 W WASHINGTON ST, STE 2202 WEST ALLIS WI; 414-555-5555.
- Step 16:** In the **Short Term Plan Of Action** field, enter WORK WITH FEP AT NEXT APPOINTMENT TO DETERMINE PROSPECTIVE INCOME AND CREATE A BUDGET. BRING A LIST OF ALL YOUR EXPENSES WITH YOU TO THE APPOINTMENT.
- Step 17:** In the **Long Term Plan Of Action** field, enter REGISTER FOR AND COMPLETE THE MANAGING YOUR MONEY WORKSHOP SERIES AT THE UW – EXTENSION OFFICE. MAINTAIN AND UPDATE YOUR BUDGET ON A MONTHLY BASIS.
- Step 18:** Click + Continue.
- Step 19:** Luka does not have any **Child Care Needs**, **Transportation Needs**, or **Legal Assistance Needs**. Repeat steps 4 and 5.
- Step 20:** He has **Education and Training Needs**. In the **Resources** field, enter WORKFORCE INNOVATION AND OPPORTUNITY ACT (WIOA) PROGRAM, EMPLOY MILWAUKEE; 2342 N 27TH ST MILWAUKEE, WI; 414-333-5555



- Step 21:** Click + Add Resource.
- Step 22:** Enter MATC CAREER COACH; 700 W STATE ST S101; MILWAUKEE, WI; 414-000-5500
- Step 23:** In the **Short Term Plan Of Action** field, enter LOOK INTO MECHANIC CERTIFICATIONS. RESEARCH FINANCIAL AID OPTIONS AT MATC AND TALK WITH YOUR EMPLOYER TO SEE IF THEY PROVIDE CONTINUING EDUCATION ASSISTANCE. TAKE THE ACCUPLACER AND SPEAK WITH AN ADMISSIONS COUNSELOR.
- Step 24:** In the **Long Term Plan of Action** field, enter ENROLL IN MATC'S MECHANIC PROGRAM AND OBTAIN YOUR DIPLOMA.
- Step 25:** Click + Continue.
- Step 26:** Luka does not identify any other needs. Check the Not Needed box for **Health Care Needs** and **Other Needs**. On the **Other Needs** page, click + Exit.





- Step 27:** Review Luka's **Supportive Service Plan**. Then, click Submit.
- Step 28:** Enter a PIN Comment summarizing Luka's Supportive Service Plan.
- Select the W-2 PLANS **Comment Type**.
  - Example: *Luka and I created his W-2 Supportive Service Plan during today's appointment. He does not have any emergency, employment support, housing, access to economic support, childcare, transportation, legal assistance, health care, or other needs. Luka is concerned about how he is going to budget his new income for an entire family. I informed him about the Managing Your Money workshop series at the UW-Extension office and provided him with the contact information for the Family Living Educator. He liked the idea of the workshop and intends to sign up. We discussed budgeting and how maintaining an accurate monthly budget will help with a family this size. At our next appointment, I will help him create a budget. He will work on maintaining and updating the budget on a monthly basis. Luka also mentioned he still wants to pursue a mechanic certification. I provided him with the contact information for the WIOA program. I also provided him with the contact information for a career coach at the local tech school. We discussed the steps he will need to take to get into school, including taking the Accuplacer, looking into certification options, reaching financial aid, and talking to an admissions counselor. I also recommended that he check with his employer to see if they offer any continuing education assistance.*



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

- the subject line "**Luka Employment,**"
- Haylee's Case Number, and
- Luka's PIN.

A trainer will review your entries and provide feedback.