

System Entry Guide: Ongoing Part Four

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

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 completed entering employment and eligibility reviews on your cases.

This System Entry Guide guides you in processing: changing jobs and job loss/re-engagement. 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 Four.
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, the following is needed to complete the Ongoing Processes portion of Initial New Worker Training.

Complete in the Learning Center:	Make Entries in CWW and/or WWP:	Submit via Quia:
<p>Ongoing Processes Module 5 <input type="checkbox"/> Training on Demand: Ending Employment</p>	<p>Ongoing Processes Module 5 <input type="checkbox"/> Entry Guide: Ongoing Processes Part Four</p> <p>Case Name PIN Carmen _____ <input type="checkbox"/> New Employment</p> <p>Case Name PIN Haylee _____ <input type="checkbox"/> Job Loss/Re-engagement</p>	<p>Ongoing Processes Module 5 <input type="checkbox"/> Quiz: W-2 Ongoing Processes</p>

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



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

Carmen

New Employment

Carmen has been working for a while as a lunch room aide at the local elementary school. She also obtained her HSED last Friday. Carmen passed the Science test with a score of 150 and the Social Studies test with a score of 175. She passed the Civics and Health exams as well.

With the help of the Job Developer, she continued to update her resume, complete applications, and practice interviewing techniques. Together, they discussed career planning and pathways. She applied and interviewed for an administrative assistant position at the local chiropractic office. She was offered and accepted the job. Her part-time job ends today and she starts her new full-time position tomorrow. Carmen will be greeting visitors, answering phones, compiling mail, and composing some documents. She will work 7:30-4:00 with a 30 minute lunch break, Monday-Friday, at \$15.00/hour, be paid semi-monthly, and receive medical benefits and paid time off. She will receive her first paycheck three weeks from today. Now that she has her HSED, she thinks looking into a customer service technical certificate will help her advance in her new job.

Carmen agrees to a CMF+ placement, retention services, and wants to develop a Supportive Service Plan.

You and Carmen work together to develop a retention plan and discuss a Supportive Service Plan. Carmen mentions she is a little worried about getting to her new job across town. She admits that her car has been having a lot of issues lately, and she does not know how she would get to work if it broke down. Together, you decide the best long-term plan of action is to save up to buy a newer vehicle. You provide Carmen with the contact information for a local bank which assists low-income individuals with auto loans, and inform her about the Work'n Wheels, WETAP, and JAL programs. In the short-term, she will look into bus routes and talk to her friends and family about giving her a ride to work in case of emergency.










Carmen is also concerned about her work hours. She starts work before Lucia goes to school and gets done after Lucia gets home. You inform her of the before and after school care programs at the local YMCA and with KinderCare. Carmen will enroll Lucia into one of these programs as her long-term plan of action. In the short-term, she will talk to her mom to see if she would drop off Lucia at school and pick her up. As a back-up, Carmen will reach out to Lucia's school to see if they allow early drop off and talk to her neighbor to see if she is willing to watch Lucia until she gets home from work.

Additionally, you plan to meet with Carmen once a week for her first month to ensure she has everything she needs to be successful.

Entries

WWP

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

	Lunch Room Aide Riverview Elementary School Wautoma WI	05/15/2020-----Present 15 hr/week \$12.00/Hour		
	Cashier Kwik Trip Platteville WI	02/04/2018-----02/04/2020 35 hr/week \$10.25/Hour		
	Cashier Walgreens Platteville WI	08/04/2015-----05/04/2016 30 hr/week \$9.00/Hour		

[+ Add Work History](#)

- Step 1:** Complete a new informal assessment.
- Step 2:** On the **Work History** page, click the Edit button for her Lunch Room Aid job.
 - Complete the entries necessary to end this employment.
 - Save and Exit.
- Step 3:** Indicate that she is employed Full-Time.
 - Enter employment information for her job through the Chiropractic Office.

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

GED/HSED

State Issued: Wisconsin Year Awarded: 2020

- Step 4:** On the **Education History** page:
 - Update her high school graduation status.
 - WISCONSIN issued her HSED this year.
- Step 5:** Click + Continue to continue with the informal assessment pages.
- Step 6:** Submit her Informal Assessment.
- Step 7:** In the Test Scores app, enter Carmen's remaining HSED test scores.

- Step 8:** Enter PIN comments regarding her new employment and completion of the HSED.
- Step 9:** Create a new EP for Carmen.
- Step 10:** End Carmen's Other Program Goal as successfully completed.
 - Now that she is employed full-time, have her goals changed? End any other goals and record new goals as needed.
 - Enter a new Other Program Goal for Carmen. She would like to earn a Customer Service Technical Certificate.
- Step 11:** Check the box next to her new job to include Carmen's employment on her EP.
- Step 12:** Update Carmen's activities.
 - End all activities except job retention.
 - Update retention activities as needed.
 - Remember to add Supportive Services.



Do **not** submit Carmen's EP yet. A trainer will tell you when to submit the EP. Continue to Step 13.

- Step 13:** Create a Supportive Service Plan for Carmen. Check the Not Needed box on the **Emergency Needs, Employment Support Needs, Housing Needs, Access to Economic Supports, and Money Management Needs** pages.
- Step 14:** On the **Child Care Needs** page, enter resource information for your local before/after school care programs at the YMCA and KinderCare, Carmen's **Short Term Plan Of Action**, and her **Long Term Plan Of Action**. Then, click + Continue.
- Step 15:** On the **Transportation Needs** page, enter resource information for a local bank, and your local Work'n Wheels, WETAP, and JAL programs, Carmen's **Short Term Plan Of Action**, and her **Long Term Plan Of Action**. Then, click + Continue.
- Step 16:** Check the Not Needed box on the **Legal Assistance Needs, Education and Training Needs, Health Care Needs, and Other Needs** pages. Then, click + Exit.
- Step 17:** Review Carmen's Supportive Service Plan. Then, click Submit.

CWW

Employment Description

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

- Step 1:** End Carmen’s current job at the Elementary School.
- Select YES for the question “Employment Ended?”
 - Enter TODAY’S DATE as the **Employment End Date**.
 - Enter a date two weeks from today as the **Date of Last Paycheck**.

Totals and Comments Calculate

Monthly In-kind Amount:	\$ <input type="text"/> . <input type="text"/>	Verification:	<input type="text"/>
Total Amount Per Pay Period:	\$ 180 . 00		
Monthly MA Gross Amount:	\$ 720 . 00		
Override MA Gross Amount:	\$ <input type="text"/> . <input type="text"/>	Verification:	<input type="text"/>
Monthly BC+ Pre-Tax Deductions Amount:	\$ <input type="text"/> . <input type="text"/>		
Monthly BC+ Taxable Amount:	\$ 720 . 00		
Override BC+ Taxable Amount:	\$ <input type="text"/> . <input type="text"/>	Verification:	<input type="text"/>
Monthly Converted Amount:	\$ 774 . 00		
Override Converted Amount:	\$ 0 . 00	Verification:	AF - AGENCY FORM
Monthly Total Hours:	65		
Monthly Override Hours:	<input type="text"/>		
Subsidized Employment Subsidy:	\$ <input type="text"/> . <input type="text"/>		
Comment:	<div style="border: 1px solid gray; padding: 5px;"> <p>started work on 5/15/20. Job Ended on 5/20/20. Last paycheck being received 5/29/20. Will not receive any income in June. Entered \$0 override.</p> </div>		

Current Size = 151 characters (240 characters max)

Enter New Begin Month MM / YYYY

- Step 1 Cont.:**
- Calculate the amount of income Carmen will receive in that **Begin Month**. Enter this amount in the **Override Converted Amount** field. Update your **Comment**.
 - In the Date Navigator, click Previous Effective Month to navigate to the previous Begin Month sequence.

- Enter YES for “Employment Ended?”, TODAY’S DATE as **Employment End Date**, and a date two weeks from today as the **Date of Last Paycheck**.

Totals and Comments		Calculate
Monthly In-kind Amount:	\$ <input type="text"/> . <input type="text"/>	Verification: <input type="text"/>
Total Amount Per Pay Period:	\$ 180 . 00	
Monthly MA Gross Amount:	\$ 720 . 00	
Override MA Gross Amount:	\$ <input type="text"/> . <input type="text"/>	Verification: <input type="text"/>
Monthly BC+ Pre-Tax Deductions Amount:	\$ <input type="text"/> . <input type="text"/>	
Monthly BC+ Taxable Amount:	\$ 720 . 00	
Override BC+ Taxable Amount:	\$ <input type="text"/> . <input type="text"/>	Verification: <input type="text"/>
Monthly Converted Amount:	\$ 774 . 00	
Override Converted Amount:	\$ 120 . 00	Verification: AF - AGENCY FORM
Monthly Total Hours:	65	
Monthly Override Hours:	<input type="text"/>	
Subsidized Employment Subsidy:	\$ <input type="text"/> . <input type="text"/>	
Comment:	<div style="border: 1px solid gray; padding: 5px;"> started work on 5/15/20 and it ended on 5/20/20. She only worked two days (10 hours). Only paycheck from this position on 5/29/20. Entered \$120.00 override (10 hours x \$12/hour = \$120.00). </div>	
Current Size = 197 characters (240 characters max.)		

- Step 1 Cont.:**
 - Calculate the amount of income Carmen is yet to receive in the current month. Enter this amount in the **Override Converted Amount** field. Update your **Comment**.

Individual Sequence Updated on or before

MM / DD / YYYY Go
← → +

Cancel ← Previous Next →

- Step 2:** Click the Add New Information button at the bottom of the page.
- Step 3:** Enter Carmen’s new job with the chiropractic office.
- Step 4:** Enter the **Override Converted Amount** for the first month she has this job. Then **Enter New Begin Month** to delete the override and budget her ongoing income.
- Step 5:** Click the Ignore W-2 Income and Asset Tests to Allow CMF/+ Placement to begin checkbox on the **Initiate Eligibility** page. Select Run Eligibility with Date.
 - Run with multiple dates if after Adverse Action. Remember to click the checkbox each time.

- Confirm only if passing.

- Step 6:** Select Run Eligibility to run eligibility without dates.
 - Confirm only if passing.

Future Placement Information		Clear
Individual:	<input type="text" value="24F PP"/>	
Placement:	<input type="text" value="CMF+ - CASE MGMT F"/>	
Placement Begin Date:	<input type="text" value="05"/> / <input type="text" value="27"/> / <input type="text" value="2020"/>	

- Step 7:** Complete the **Future Placement Information** section.
 - Enter a future **Placement** of CMF+ and a future date for her **Placement Begin Date** for tomorrow.
- Step 8:** Enter Case Comments.

WWP

- Step 1:** Enter PIN comments that reflect changes in Carmen’s placement EP, and Supportive Service Plan.



Send an email to PTTTrainingSupp@wisconsin.gov with:

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

A trainer will review your entries and provide feedback.

Haylee

Job Loss/Re-Engagement

Haylee calls you to report that Luka lost his job. She tells you it's all a big mess. You schedule a meeting with Haylee and Luka for the next day.

During your meeting, Luka explains that he sometimes drinks at night. This caused him to oversleep on occasion. While Haylee leaves the room to care for Sophia, you ask Luka about his drinking. He explains that he had a problem in the past, but got over it and can do it again. Luka does not believe it will interfere with his ability to participate in the W-2 program. You ask if he would like any resources or to talk to someone. After continuing the conversation, he decides that attending AA meetings may be a good idea.

You conduct an informal assessment with Luka to determine appropriate placement and activities. Even with Luka's job loss, you still feel he is the most employable at this time. You maintain him as the parent placed, and change the placement to CSJ. Together, you reexamine his Employability Plan and update it to include attending AA meetings, working with the Job Developer, and other activities designed to re-engage him in work.

Entries

CWW

- Step 1:** End Luka's employment in CWW, end dating the employment and reporting the final check information.
 - Similar to when Luka started the job, the month of the final paycheck needs to be prorated to budget the income he receives in the final month.

- Step 2:** On the **W-2 Placement** page, click the Check for Non-CMF/+ Placement Eligibility button.
 - Confirm only if passing.

- Step 3:** Update Luka's placement on the **W-2 Placement** page.

- Step 4:** Enter **Case Comments**.

WWP

- Step 1:** Complete an informal assessment for Luka.
 - Record necessary changes on the **Work History** page.
 - Record new information on the **Participant Barriers** page.
 - Remember, Luka does not believe this barrier will affect his ability to participate. Do not create a **Participant Barrier** page for it.

- Step 2:** Review and update Luka's EP.
 - Remember to include Luka's AA meetings.
 - Keep in mind, participants in the CSJ placement can be assigned less than 40 hours a week of activities depending on their circumstances. If you assign Luka less than 40 hours a week, be sure to enter detailed PIN comments explaining why you assigned less hours.



Do **not** submit Luka's EP yet. A trainer will tell you when to submit the EP. Continue to Step 3.

- Step 3:** Record and document all changes in **PIN Comments**. Remember to include comments related to:
 - Placement decision
 - Job loss
 - Assessment
 - Employability Plan

- Step 4:** Enter PIN Comments for Haylee explaining the placement change due to Luka's job loss, and explaining why he is still the placed parent.



- Send an email to PTTTrainingSupp@wisconsin.gov with:
- the subject line "**Haylee Job Loss/Re-Engagement**," and
 - Haylee's and Luka's PINs

A trainer will review your entries and provide feedback.

Conclusion

Congratulations! You've worked through many ongoing changes: placements, participation tracking, employment, a person add, and retention. You've come a long way, and made a lot of changes to Carmen's and Haylee's cases. After everything has been completed in this section, a trainer will email you your next steps.