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

Learning Objectives:
- Identify system screens and 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 a Request for Assistance, conducted an initial informal assessment, determined eligibility for W-2, and made placement decisions for your cases. All of those steps lead you to: Ongoing Processes. When working with participants, you need to respond to various updates, enter and update information, re-determine eligibility, and make many case management decisions.

This System Entry Guide guides you in processing: updates due to placement, non-participation, employment, placement change, retention services, two parent groups, 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 Processes.
2. Refer to the additional resources mentioned in the Ongoing Processes: System Resource Document.
3. When you see the stop sign, follow the instructions for submitting your case to the Partner Training Team at PTTTrainingSupp@wisconsin.gov.
4. Use the CWW System Help, WWP Help Center, and CARES system help at any time.
5. Email the Partner Training Team with any problems or if your results don’t match what is explained in the instructions.
Symbols and Icons

Remember that all cases in the Training Base are registered in Eau Claire County, office 5518. The Work Programs office is 1111.

<table>
<thead>
<tr>
<th>System Icons</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>CARES Worker Web (CWW)</td>
<td></td>
</tr>
<tr>
<td>Wisconsin Work Programs</td>
<td>(WWP)</td>
</tr>
<tr>
<td>CARES Mainframe</td>
<td></td>
</tr>
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</table>

<table>
<thead>
<tr>
<th>Training Icons</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Access the CWW Help</td>
<td>resources for specific questions. On any CWW page, clicking the Help button will open System Help for that page in a new window.</td>
</tr>
<tr>
<td>Contact PTT</td>
<td>with any questions or concerns at <a href="mailto:PTTTrainingSupp@wisconsin.gov">PTTTrainingSupp@wisconsin.gov</a></td>
</tr>
<tr>
<td>STOP the system entry</td>
<td>process to review other materials, or to submit activities to PTT.</td>
</tr>
</tbody>
</table>
Ongoing Processes

As a reminder, the following is needed to complete the Ongoing Processes portion of Initial New Worker Training.

<table>
<thead>
<tr>
<th>Complete in the Learning Center:</th>
<th>Make Entries in CWW, WWP, and/or CARES:</th>
<th>Submit via Quia:</th>
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<tbody>
<tr>
<td>System Processes</td>
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<td>Case Name PIN</td>
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<td>□ Person Add</td>
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<td>□ Dmitry's Informal Assessment</td>
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<td>□ Dmitry</td>
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<td>□ Two Parent Placement Change</td>
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<td>□ Employment</td>
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<tr>
<td></td>
<td>□ Job Loss/Re-engagement</td>
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</tbody>
</table>

Use this System Entry Guide as you complete Ongoing Processes.

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

Start with Mariana’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. Mariana is eager to enter into the workforce. Currently, she is in a CSJ placement.

Changes Due to Placement

Mariana’s time in up-front ended and she is in a CSJ placement. You meet with Mariana to make updates and changes to her case including reviewing her participation, including her assigned activities, and updating her Employability Plan.

During up-front, Mariana completed the TABE. You reviewed her scores with her. She scored 0475 in Math and 0470 in Reading. This doesn’t surprise Mariana. You and Mariana discuss how those scores impact her ability to obtain her HSED, which remains one of her goals.

You also review her Career Locker career assessment results. Mariana 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. Mariana’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). Mariana further explored other related occupations based on her interests. Those included a few different clerical jobs, 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, Mariana would like to further her education in the clerical field.

You and Mariana also continue to assess her job readiness. Mariana’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 really proud of getting Associate of the month two times in one year. Mariana 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.

Mariana is comfortable with submitting online applications, and had done that in the past. She has learned some interviewing tips and follow-up tips from the Job Developer and Job Club. Mariana does not yet have a resume and is not confident writing cover letters. She would like to work on those. Mariana knows she has two references she can use, but needs to think about who she can ask as a third reference. All of her identification and important documents are in order.
You and Mariana 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, Mariana 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. Mariana does have two potential interview outfits that she has worn in the past.

She has been focusing on her job search for clerical-type positions. She applied for some jobs and is following up, but has not received calls for any 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.

You follow up on her action items. She has child care set up, and an appointment with section 8 housing for later this week.

Together, you and Mariana decide on new activities based on her assessment results and placement. Mariana will register for and begin HSED classes at the local technical college. She is excited to start working toward one of her goals. Mariana 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. Mariana agrees to continue to meet with the Job Developer, attend Job Club, and employment search.

Entries

WWP

Step 1: Locate your Mariana case in WWP.

Step 2: From the Case Management navigation toolbar, select the Test Scores App.

Step 3: Click on + Add Test.
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** 470
- **Mathematics Scale Score** 475

Step 7: Click Save.
Step 8: Click +Add PIN Comment.

Step 9: Record comments related to her Educational Needs Assessment.
   - Select Comment Type INFORMAL ASSESSMENT.

Step 10: Click Save.

Step 11: From the Case Management navigation toolbar, select the Action Needed App.

Step 12: Mark the Housing and Child and Youth Supports action items as complete.

Step 13: From the Case Management navigation toolbar, select Career Assessment.
■ **Step 14:** Click + Add Career Assessment.

![Add Career Assessment](image)

- **Element(s) (Select all that apply):**
- **Completion Date:** MM/DD/YYYY
- **Assessment Tool Used:**
- **Assessment Provider:**
- **Assessment Results:**
- **Related Occupation(s):**
- **How are the assessment results being applied to the Employability Plan and Activities?**

■ **Step 15:** From **Element(s)**, select WORK STYLES, SKILLS, and INTERESTS.

■ **Step 16:** Enter a date four days ago.

■ **Step 17:** Enter YOUR AGENCY as the **Assessment Provider**.

■ **Step 18:** Enter CAREER LOCKER as the **Assessment Tool**.

■ **Step 19:** For **Assessment Results** and **Related Occupations**, summarize Mariana’s results.
  - Be sure to include specific skills, interests, and occupations that were mentioned in the scenario, along with any other relevant information.

■ **Step 20:** 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 what is assigned on WPJS and WPAS.
  - An example: *Mariana’s Employment, Long-Term, and Short-Term 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 21:** Click Save.
Step 22: Click +Add PIN Comment and add comments summarizing Mariana’s Career Assessment results.
  ○ Select **Comment Type** INFORMAL ASSESSMENT.

---

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

- [ ] Yes
- [ ] No
- [ ] Unknown

Details

Step 22: In the Informal Assessment, navigate to the Work History page.

Step 23: Answer Yes to the question “Have you ever completed a career assessment either online, in a school setting, or through a work program?”

Step 24: In the Details field, enter MARIANA COMPLETED CAREER LOCKER ASSESSMENT. DETAILS ON CAREER ASSESSMENT PAGE.

Step 25: From the Case Management navigation toolbar, select **Job Readiness**.

Step 26: Complete the History Questions, Application Questions, and Interview Questions fields.
  ○ Refer back to the scenario. Include specific details.

Step 27: Click Save.
  ○ The Job Readiness page now should be saved without errors.

Step 28: Click +Add PIN Comment, and add comments summarizing Mariana’s job readiness.
  ○ Select **Comment Type** INFORMAL ASSESSMENT.
CARES

☐  Step 1:  Locate your Mariana case in CARES.

☐  Step 2:  TRAN to CARES screen WPAS.

☐  Step 3:  Enter today as the ACTIVITY PLAN begin date, and a date 30 days from now as the end date.
   ○ Use these dates for the PLANNED BEG DATE and PLANNED END DATE for all activities (except ACTIVITY 1).

☐  Step 4:  Enter REGISTER FOR HSED COURSES as Activity 1. This activity will last for one week. Assign this for 2 hours per week. In the REM field, enter THURS 9:00-11:00. In the LOCN field, enter the location of your local Technical College.

☐  Step 5:  Enter WORK EXPERIENCE as Activity 2. Assign this for 15 hours per week. In the REM field, enter MON-FRI 12:30-3:30. In the LOCN field, enter OUR NEIGHBORS.

☐  Step 6:  Keep MEET WITH JOB DEVELOPER BOB SMITH as Activity 3. Update dates.

☐  Step 7:  Keep ATTEND JOB CLUB as Activity 4. Update dates.

☐  Step 8:  Keep INDEPENDENT JOB SEARCH as Activity 5. Assign this for 10 hours per week. In the REM field, enter 2 HOURS DAILY. In the LOCN field, enter SEARCH FOR COMPANIES IN 10 MILE RADIUS.
Step 9: In the COMMENTS section, enter WORK EXPERIENCE WILL FOCUS ON BASIC OFFICE SKILLS.

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<td>DCF067 K CHAPPA</td>
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<tr>
<td>NAME</td>
<td>WINCHESTER</td>
<td>MARIANA</td>
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<tr>
<td>REGION</td>
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<td>OFFICE: 1111</td>
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<td>COMPONENT/STATUS:</td>
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<tr>
<td>PHASE:</td>
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<td>W-2 SANC IND (Y/N):</td>
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<td>DAILY SCHEDULED HOURS:</td>
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<td>PF14 POST ANOTHER COMPONENT</td>
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<td>PARMs:</td>
<td>9205282987</td>
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</tbody>
</table>

Step 10: Tran to WPCS.

Step 11: Enter the information for the following activity codes: HE for 2 hours, WE for 15 hours, MO for 3 hours, and ES for 13 hours.
- All activities are in Actual phase.
- PROVIDER ID is 0002.
- FUNDING SOURCE is WTWO.
- All activities are Sanctioned activities.
- Enter a DOT code for the WE activity.
- Remember: Match the Anticipated End Date to the Planned End Date on WPAS.

Step 12: Tran to WPCH to review all activities entered.
**WWP**

- **Step 1:** Return to Mariana’s case in WWP.
- **Step 2:** From the **Case Management** navigation toolbar, select **PIN Comments**.
- **Step 3:** Enter comments that capture Mariana’s Employability Plan changes.
  - Select Comment Type **EMPLOYABILITY PLAN/ACTIVITY ASSIGNMENT**.

Send an email to **PTTTrainingSupp@wisconsin.gov** with:
- the subject line “**Mariana Changes Due to Placement**,” and
- Mariana’s PIN.

Your entries will be reviewed, and feedback provided. Use the feedback you receive to assist you in moving forward.
Non-Participation

Mariana missed one day of ES and WE due to illness. She leaves messages with you and her work site supervisor. You follow up with Mariana. She explains that she has some type of stomach bug. Sage is home from school with it, too. Mariana 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 Mariana did not attend. You follow up with the Job Club facilitator, who has not heard from her. You contact Mariana and have a conversation about this. Mariana 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. Mariana would like to find something else to do instead. For now, you remove Job Club from Mariana’s Employability Plan. You tell her that you can discuss different activities with her at her next appointment.

Entries
CARES

- **Step 1:** TRAN to WPNH with the PARMS of PIN/A.
- **Step 2:** Enter the NON-PART DATE.
  - Make sure the date is within the date range of the activity you entered on WPCH. You may need to adjust dates to fit open activities.
- **Step 3:** Enter ES as the COMP/STAT.
Step 4: Use the reference tables to enter the NP TYPE and NP STATED RSN, based on the information provided.
  o To access a reference table, enter a # in the field and <Enter>.

Step 5: Enter the NP HOURS that Mariana didn’t complete and whether there is any good cause reported.
  o Good cause may include:
    • GC, GC HOURS and GC Reason

Step 6: At a minimum, enter a PRIMARY COMMENT to summarize your entries.

Step 7: <Enter>

Step 8: Follow the same steps to enter non-participation for WE and MO.

Step 9: TRAN to WPAS and enter Y in the DEL field for the Job Club Activity.
  o It is best practice to move the last activity into that activity field. This makes the EP easier to read.
Step 10: TRAN to WPCH and enter C in the TYPE OF ACTION field above MO. <Enter>.

Step 11: You are now on WPCS. Enter a COMPLETION CODE and TODAY’S DATE in the ACTUAL END DATE field.
WWW

☐ Step 1: Enter PIN comments regarding any Good Cause determination.
   ○ Be sure to assign the **Comment Type** of GOOD CAUSE DETERMINATION and PARTICIPATION TRACKING.

☐ Step 2: Enter PIN comments regarding Mariana’s Employability Plan change.

Send an email to **PTTTrainingSupp@wisconsin.gov** with:
- the subject line “**Mariana Non-Participation**,” and
- Mariana’s PIN.

Your entries will be reviewed, and feedback provided. Use the feedback you receive to assist you in moving forward.
Placement Change and Employment

Mariana has been working with the Job Developer 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. Mariana is very excited. These hours will work great in terms of child care for Sage. 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. Mariana 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 her cover letter writing. Both are current, and she feels more confident with her skills.

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

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 GED and employment search.

Entries

WWP

[Informal Assessment]


[Step 2] Review Mariana’s informal assessment information on each page, making updates as needed.
Step 3: On the Work History page, indicate Mariana’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.

Step 9: Click Save and Exit.

Step 10: Click +Continue.
Step 11: On the Education History page, indicate that she is working toward her HSED. Select the + button to add Test Scores.

Add Test Score

<table>
<thead>
<tr>
<th>Test Type</th>
<th>GED/HSED</th>
<th>Date Taken</th>
<th>Score</th>
<th>Pass/Fail</th>
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<tbody>
<tr>
<td>Language</td>
<td>155 / 200</td>
<td>05/18/2020</td>
<td>Pass</td>
<td></td>
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<tr>
<td>Mathematics</td>
<td>145 / 200</td>
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<tr>
<td>Health</td>
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</table>

Step 12: Enter MONDAY’S DATE in the Date Taken field.

Step 13: Enter 155 as her Language score. Indicate that she passed.

Step 14: Enter 145 as her Mathematics score. Indicate that she passed.

Step 15: Click Save.

Step 16: Click +Continue.
Step 17: Review the remaining pages, considering any Action Needed items, and saving each page as you go along.

Step 18: Submit the informal assessment.

Do you have a current resume and a cover letter?

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

Step 19: On the Job Readiness page, update Mariana’s response to the Application Question concerning her resume and cover letter.

Step 20: Enter PIN comments. Comments should indicate an informal assessment was completed, reflect Mariana’s new employment situation and what her job entails, and indicate her completed HSED tests.
  o Choose all Comment Types that apply.
CWW

**Employment Gatepost**

<table>
<thead>
<tr>
<th>Effective Period</th>
<th>Last Updated: 05/15/2020</th>
</tr>
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</table>

- **Questions:**
  - 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.)? **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 Mariana’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.

**Step 4:** Because this is new employment, first determine the **Begin Month**. This is the month in which the first paycheck is received.

**Step 5:** Enter the **Begin Month**.

**Step 6:** Select the **Individual**.

**Step 7:** Enter all fields related to **Employer Information**.
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?”

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.
Step 14: Click Calculate to populate the **Totals and Comments** section.
- Notice that the **Monthly Converted Amount** must be overridden to account for Mariana 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 Mariana will receive in the month she begins work. Enter this 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.

Step 18: Note that the new **Employment** page will display with a new **Begin Month**.
Step 19: Scroll down to the **Totals and Comments** section and delete the **Override Converted Amount**. Remove the Verification.

Step 20: Enter **Comments** explaining the calculations.

Step 21: Click Next.

**Employment Summary Details**

<table>
<thead>
<tr>
<th>Individual/Sequence</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Individual: MARIANA WINCHESTER 24F PP</td>
<td></td>
</tr>
<tr>
<td>Sequence: 1</td>
<td></td>
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</tbody>
</table>

<table>
<thead>
<tr>
<th>Details</th>
<th>Begin Month</th>
<th>End Month</th>
<th>Last Updated</th>
<th>Del Ran</th>
<th>Employer Name</th>
<th>Emp Elig Date</th>
<th>Monthly MA Gross Amount</th>
<th>Monthly BC+ Taxable Amount</th>
<th>Converted Amount</th>
<th>In-Kind Amount</th>
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<tbody>
<tr>
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<td>05/20/2020</td>
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<td>RIVERVIEW ELEMENTARY SCHOOL 05/15/2029</td>
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<td>$720.00</td>
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<tr>
<td>05/2020</td>
<td>05/20/2020</td>
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<td></td>
<td></td>
<td>RIVERVIEW ELEMENTARY SCHOOL 05/15/2029</td>
<td>$720.00</td>
<td>$720.00</td>
<td>$180.00</td>
<td>$0.00</td>
<td></td>
</tr>
</tbody>
</table>

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.
Step 23: Select Run Eligibility with Date.
  o Run with multiple dates if after Adverse Action.
  o Confirm only if passing.

Step 24: Select Run Eligibility to run eligibility without dates.
  o Confirm only if passing.

Step 25: Place Mariana into a ½ CSJ (CS2) placement on the W-2 Placement page effective today.

Step 26: Enter Case Comments related to the new employment, eligibility results, and change in placement.
CARES

Step 1: TRAN to WPJS. Review Mariana’s goals and ensure they are still accurate.

Step 2: TRAN to WPAS. Update Mariana's Employability Plan to reflect her new employment. Her activities should include:
- Part-Time Employment for 15 hours/week.
- Meeting with the Job Developer for 3 hours/week.
- Independent Employment Search for 10 hours/week.
- Retention Services with you for 1 hour/week.
- Working toward HSED for 5 hours/week.

Step 3: Update activities on WPCSH/WPCS.

WWP

Step 1: Enter PIN comments. Comments should reflect Mariana’s placement change, updated EP, and retention services being offered.
- Choose all Comment Types that apply.

Send an email to PTTTTrainingSupp@wisconsin.gov with:
- the subject line “Mariana Placement Change and Employment,” and
- Mariana’s PIN.

Your entries will be reviewed, and feedback provided. Use the feedback you receive to assist you in moving forward.
Retention

Mariana has been working for a while as a lunch room aide at the local elementary school. She also obtained her HSED last Friday. Mariana 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 school district’s administrative office. She was offered and accepted the job, and will start this new position on Wednesday. Mariana will be greeting visitors, answering phones, compiling mail, and composing some documents. She will work 7:30-4:00, Monday-Friday, at $15.00/hour, be paid weekly, and receive medical benefits and paid time off.

You and Mariana work together to develop a retention plan. You plan to meet with Mariana once a week for her first month. You want to ensure Mariana has everything she needs to be successful. Part of what you’ll discuss is child care, transportation, etc. She will be placed in a CMF+ placement.

Entries

WWP

<table>
<thead>
<tr>
<th>What is your employment status?</th>
<th>Full-Time</th>
<th>Part-Time</th>
<th>Unemployed</th>
</tr>
</thead>
<tbody>
<tr>
<td>Lunch Room Aide</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Riverview Elementary School</td>
<td>05/15/2020- Present</td>
<td>15 hr/week</td>
<td>$12.00/Hour</td>
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<tr>
<td>Wautoma WI</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Cashier</td>
<td>02/04/2018-02/04/2020</td>
<td>35 hr/week</td>
<td>$10.25/Hour</td>
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<tr>
<td>Kwik Trip</td>
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<tr>
<td>Platteville WI</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Cashier</td>
<td>08/04/2015-05/04/2016</td>
<td>30 hr/week</td>
<td>$9.00/Hour</td>
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<tr>
<td>Walgreens</td>
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<td></td>
<td></td>
</tr>
<tr>
<td>Platteville WI</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

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 School District.

![Image of GED/HSED form]

Step 4: On the Education History page:
- Enter her remaining HSED test scores.
- 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: Enter PIN comments regarding her new employment and completion of the HSED.
Step 1: End Mariana’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 a week from today as the Date of Last Paycheck.

Step 1 cont…:
- Calculate the amount of income Mariana 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 a week from today as the Date of Last Paycheck.
## System Entry Guide: Ongoing Processes

### Step 1 (cont...):
- Calculate the amount of income Mariana is yet to receive in the current month. Enter this amount in the **Override Converted Amount** field. Update your **Comment**.

### Step 2:
Click the Add New Information button at the bottom of the page.

### Step 3:
Enter Mariana’s new job with the School District.

### 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.

Step 7: Change Mariana’s placement on the **W-2 Placement** page to CMF+.
- Enter a future date for her **Placement Begin Date** for next Wednesday.
CARES

☐ Step 1: Review Mariana’s goals on WPJS.
  o Now that she is employed full-time, have her goals changed?

☐ Step 2: Record her new Employability Plan on WPAS.
  o Record her full-time employment hours.
  o Record any retention activities.

☐ Step 3: Update WPCH/WPCS.

WWP

☐ Step 1: Enter PIN comments that reflect changes in Mariana’s placement and EP.

Send an email to PTTTrainingSupp@wisconsin.gov with:
  • the subject line “Mariana Retention,” and
  • Mariana’s PIN.

Your entries will be reviewed, and feedback provided. Use the feedback you receive to assist you in moving forward.
Lyndie

Congratulations on completing Mariana’s ongoing entries! You had the opportunity to practice updating system screens and pages based on changes, formulating case management plans, and recording your decisions and rationale. As with the other Entry Guides, you will receive fewer directions with Lyndie’s case entries. This allows you to make some independent decisions about the type of information you would gather, decisions you might make, and what information to record. Use the directions and feedback received throughout Mariana’s case entries to assist with Lyndie’s case entries.

Changes Due to Placement

Lyndie is the caretaker of an infant, Natasha, but wants to volunteer to participate in W-2, because she knows that in just a few weeks, she will be required to, and she could use a break from the kids. However, she wants to participate only part-time, maybe 20 hours per week.

During her initial informal assessment, Lyndie reported mental health issues. At that time, you discussed the benefits of a formal assessment with her, and she agreed to complete it. Lyndie returns her Mental Health Report. The information provided by the medical professional, Dr. Jane Jones, indicates that Lyndie 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. Dmitry is not with Lyndie during this appointment. The situation is safe for you to ask Lyndie about any domestic violence concerns. She reports none, and is happy with her current relationship.

Jack, her 9-year old son, has been diagnosed with Autism. Lyndie is working with medical professionals to manage his needs, but it is an ongoing process. Lyndie and Jack continue to see a professional about once a week. You ask Lyndie about the Need to Care for Disabled Family Member form you provided at her initial informal assessment. She states that she gave it to Jack’s doctor at his last appointment, but the doctor has not yet completed it.

Together, you continue to assess her job readiness. Lyndie 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. Lyndie feels her organizational skills are her greatest strength, and felt very proud that she was considered for a lead position. However, Lyndie knows that attendance is really important. She wants to be reliable, but is unsure how that can work right now.
Lyndie 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. Lyndie 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.

Lyndie does not really remember her last interview, but she got the job. Lyndie 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.

Lyndie enjoyed her manufacturing job, and is interested in continuing with her accounting education. She would like to further explore potential career goals. With Natasha being so young, you and Lyndie discuss appropriate activities. Together, you decide on a Baby and Me class offered at the local YMCA. You hope that this provides Lyndie some social support as her family continues through life changes. Lyndie also has agreed to complete the TABE and Career Locker. The results of these assessments will provide Lyndie, and you, necessary information for career planning. Finally, you encourage Lyndie to continue working with her treatment provider.

**Entries**

**WWP**

- **Step 1:** Navigate to Lyndie’s Participant Barriers app from the **Case Management** navigation toolbar.
Step 2: Add **Formal Assessment** details.
   o Use the Magnify Glass search feature to select Lyndie’s treatment provider from the list of contacts.

Step 3: Add **Accommodations** for FATIGUE/WEAKNESS and STRESS MANAGEMENT.

Step 4: Click Save and Exit.

Step 5: From this page, click +Add PIN Comment.

Step 6: Enter comments that reflect Lyndie’s formal assessment information.
   o Remember, PIN comments are not confidential.

Step 7: On the **Participant Barriers** page, select Yes to **Display next section?** Answer No to all of the domestic abuse questions.

Step 8: Click Save.

Step 9: Navigate to the **Job Readiness** page.

Step 10: Record Lyndie’s responses to the **History Questions**, **Application Questions**, and **Interview Questions**.
   o Refer back to her scenario and include specific information in the **Details** fields.
   o Check Refer for Clothing Resources as **Action Needed**.
     - Edit the task.
     - In the **Task** field, enter PROVIDE LYNDIE WITH REFERRAL INFORMATION.
     - Indicate a **Due Date** of one week from today.
     - Enter **Details**.

Step 11: Click Save.

Step 12: Click Save.

Step 13: You are now on the **Participant Summary** page. From this page, click +Add PIN Comment.

Step 14: Enter comments summarizing Lyndie’s job readiness.
CARES

☐ Step 1: Enter goals on WPJS.
  o Goals may include employment in a manufacturing setting, working toward her degree completion, activities with her family, etc.

☐ Step 2: Develop her Employability Plan on WPAS. Be sure to include:
  o Baby and Me Group
  o TABE
  o Career Assessment
  o Counseling sessions
  o Complete Need to Care for Disabled Family Member form
  o Other activities you feel would be beneficial

☐ Step 3: Record activities on WPCS.
  o Review activity entries on WPCH.

WWP

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

☐ Step 2: Enter comments that summarize Lyndie’s Employability Plan.
  o Be sure to include your rationale behind Lyndie’s activities.

Send an email to PTTTrainingSupp@wisconsin.gov with:
  • the subject line “Lyndie Changes Due to Placement,” and
  • Lyndie’s PIN.

Your entries will be reviewed, and feedback provided. Use the feedback you receive to assist you in moving forward.
Placement Change

Lyndie’s CMC placement is ending due to Natasha reaching 8 weeks of age. Lyndie has returned the Need to Care for Disabled Family Member form completed by Jack’s doctor. The form states that Lyndie is able to participate in W-2 activities while Jack 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 Jack 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 Jack needs constant supervision for his own safety. You conduct an assessment and determine that Lyndie is appropriate for a W-2 T placement due to her son’s barriers.

Together, you review her TABE and Career Locker assessment results. The TABE shows her Math score as 392 and her Reading score as 311. Lyndie 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. Lyndie enjoys working independently and on one task at a time. 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.

Lyndie also was able to get an interview outfit that fits.

You update her Employability Plan to reflect her most recent assessment information and to take into account the 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. Remember that Lyndie can be assigned Caring for a Disabled Child during the hours when she is unable to participate in other W-2 activities.

Entries

**WWP**

- **Step 1:** Complete a new informal assessment.
- **Step 2:** Click +Add PIN Comments and add comments that summarize any new assessment information.
- **Step 3:** Record her TABE scores on the Test Scores app.
- **Step 4:** From this page, click +Add PIN Comments and summarize her Educational Needs Assessment.
Step 5: Record her career assessment results on the Career Assessment page.
  - Refer back to Lyndie’s scenario for specific types of careers she is interested in and how those could be a match.
  - Be specific for how these assessment results are being implemented in her goals and activities.

Step 6: From this page, click +Add PIN Comments and summarize her career assessment.

Step 7: Update the Work History page to indicate that Lyndie has completed a career assessment.

Step 8: Update the Family Barriers page to include details about the completed Need to Care for a Disabled Family Member form.

Step 9: On the Job Readiness page, indicate that Lyndie now has an interview outfit and the Action Needed item is complete.

Step 10: Click +Add PIN Comment and add a comment summarizing Lyndie’s new job readiness information.

CWW

Step 1: Update Lyndie’s placement on the W-2 Placement page.

Step 2: Enter comments on the Case Comments page indicating the placement change.

CARES

Step 1: Record any new or updated goals on WPJS.

Step 2: Update the Employability Plan on WPAS to reflect her current situation and level of participation.

Step 3: Record activities on WPCS/WPCH.

WWP

Step 1: Document all changes and the rationale behind these changes in PIN Comments.
  - Be sure to include your rationale behind the placement decision and any updates to Lyndie’s Employability Plan.
Send an email to PTTTrainingSupp@wisconsin.gov with:
• the subject line "Lyndie Placement Change," and
• Lyndie’s PIN.

Your entries will be reviewed, and feedback provided. Use the feedback you receive to assist you in moving forward.

**Person Add**

Lyndie has missed three days of activities. You call her to find out what’s going on. She informs you that Dmitry, Natasha’s father, moved in with them five days ago. You schedule an appointment with Lyndie and Dmitry for the next day.

You start by having a conversation with Lyndie and Dmitry about W-2 eligibility, participation, etc. Then you add Dmitry to Lyndie’s case in CWW. Dmitry is 35 and provides his SSN. He and Lyndie are not married. He is the legal father of Natasha. He was born in Wisconsin and has his birth certificate. He uses his driver’s license to verify his identification. Dmitry did graduate from high school. His only asset is his 2012 Chevy Traverse valued at $8000. He still owes $2000 on the vehicle. He does not have any form of earned or unearned income.

**Entries**

**CWW**

<table>
<thead>
<tr>
<th>Workflow Options</th>
<th>Case Maintenance</th>
</tr>
</thead>
<tbody>
<tr>
<td>Continue with Driver / Navigate Through Completed Pages</td>
<td>Reactivate Case</td>
</tr>
<tr>
<td>Add Person</td>
<td>Transition Mainframe Case to Web Case</td>
</tr>
<tr>
<td>Process Renewal / Review</td>
<td>Initiate, Resume, or Terminate Simulation</td>
</tr>
<tr>
<td>Record New Group Level Program Request</td>
<td>Change Primary Person</td>
</tr>
<tr>
<td>Process Group Level Program Request</td>
<td>Make Case Confidential</td>
</tr>
<tr>
<td>View / Record Six Month Report Actions</td>
<td>Transfer Case</td>
</tr>
<tr>
<td>Process linked ACCESS application</td>
<td>Begin Intake Interview for Asset Assessment Case</td>
</tr>
</tbody>
</table>

Enter Begin Month for New Data: **05/2020**

- **Step 1:** Add Dmitry to Lyndie’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 Dmitry on the Household Members page.

Step 5: Change all the Request Dates to the current date.

Step 6: Record Dmitry’s relationship to the other household members on the Household Relationships page.

Step 7: Run Clearance and note Dmitry’s PIN.

Step 8: Enter Dmitry’s School Enrollment page.

Step 9: Enter all non-financial information.
   - Update the Absent Parent page, as Dmitry is now in the home and legal parentage has been established.

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.
   - If it is before Adverse Action, run eligibility the first time with the date you are adding Dmitry (the date he moved in). Then run eligibility a second time without a date.
   - If it is after Adverse Action, run eligibility the first time with the date you are adding Dmitry (the date he moved in). Run eligibility a second time with the date of the 1st of the next month. Run eligibility a third time without a date.

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.

Send an email to PTTTrainingSupp@wisconsin.gov with:
- the subject line “Lyndie Person Add,” and
- Lyndie’s Case Number.

Your entries will be reviewed, and feedback provided. Use the feedback you receive to assist you in moving forward.
Dmitry’s Informal Assessment

After referring Dmitry 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 Lyndie is that he lost his job two weeks ago as a mechanic at A+ Automotive where he had worked for the last two years. 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 Dmitry being fired. He has never completed a career assessment. Three years ago, he 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. Dmitry 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. Dmitry uses his personal vehicle for transportation. His driver’s license and auto insurance are current.

Dmitry reports no legal issues, or personal barriers to employment. Natasha is his only child.

Dmitry 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. Dmitry names three companies that he could apply to right now. He doesn’t want to work for friends any more, as he feels that just causes problems. Ideally, Dmitry would like to work day 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. Dmitry provides you with his email address. You and Dmitry plan to continue the discussion of job readiness at a later appointment.

Together, you develop career goals and an Employability Plan that includes employment search, job development, career assessment, educational needs assessment, and other activities you deem appropriate.

Entries

WWP

- **Step 1**: Click the PIN Search tab. Look up Dmitry by his PIN.
- **Step 2**: Click to select Dmitry from the list.
- **Step 3**: Click the Enroll Participant button.
Step 4: Complete Dmitry’s informal assessment.
   o If something was not expressly stated in the scenario, make it up.

Step 5: Submit Dmitry’s informal assessment.

Step 6: Record PIN Comments summarizing Dmitry’s informal assessment.

Step 7: Enter Dmitry’s Job Readiness information.
   o Refer back to his scenario for any specific details.
   o Click Save with Errors.

Step 8: Enter PIN Comments summarizing Dmitry’s job readiness.

CARES
Step 1: Determine Dmitry’s goals on WPJS. Be sure to include personal goals.

Step 2: Develop his Employability Plan on WPAS. Use your judgement and the information you have to choose appropriate activities.

Step 3: Record activities on WPCS/WPCH.

WWP
Step 1: Enter PIN Comments summarizing Dmitry’s Employability Plan and any other case management decisions.

Send an email to PTTTrainingSupp@wisconsin.gov with:
   • the subject line “Dmitry’s Informal Assessment,” and
   • Dmitry’s PIN.

Your entries will be reviewed, and feedback provided. Use the feedback you receive to assist you in moving forward.
Two-Parent Placement Change

Based on your assessment information, you determine Dmitry is the more employable parent at this time.

**Entries**

**CWW**

- **Step 1:** Update the **W-2 Placement** page by selecting Dmitry as the **Individual** in the W-2 placement.

- **Step 2:** Select the new placement with a **Placement Begin Date** of today.
  - Do not backdate Dmitry’s placement.
  - Do not enter a **W-2 Episode End Date** for Lyndie.

- **Step 3:** Click Next. This automatically ends Lyndie’s placement.

- **Step 4:** 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?”

- **Step 7:** This is a two-parent household. The correct result for this page should be Y.

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

**CARES**

- **Step 1:** Update WPNH/WPNP to record Lyndie’s missed activities. Document a good cause determination.

- **Step 2:** Update Lyndie’s goals, Employability Plan, and assigned activities to reflect her current situation.
WWP

Step 1: Record PIN Comments for Dmitry summarizing your placement decision.

Step 2: Record PIN Comments for Lyndie explaining the decisions and changes you made to her activities. Be sure to include:
  o A Comment Type of GOOD CAUSE DETERMINATION for comments related to her non-participation.
  o A summary of her current situation and why she is no longer the placed parent.

Send an email to PTTTTrainingSupp@wisconsin.gov with:
  • the subject line “Lyndie Two Parent Placement Change,” and
  • Lyndie’s and Dmitry’s PIN.

Your entries will be reviewed, and feedback provided. Use the feedback you receive to assist you in moving forward.

Lyndie’s Employment

Lyndie gets a part time job at Jack’s school in the office, working 10 hours per week, and earning $13.50 per hour. She is paid weekly, and will receive her first paycheck in two weeks. Lyndie’s excited, as she’ll be able to be close to Jack. 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. Dmitry remains the parent placed.

You and Dmitry 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. Dmitry 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.

Dmitry has submitted online applications before, but hasn’t received any call backs. He is unsure if he is doing something wrong. For most auto jobs, he always submitted an application. He’s never needed to have a resume or cover letter. Dmitry does have professional references he can use. All of his necessary documents are current.
Dmitry’s last interview was at A+ Automotive, and his friend was the one interviewing him. Dmitry 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 Dmitry 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 Lyndie’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.

☐ Step 4: Record comments on the Case Comments page detailing the change.

CARES

☐ Step 1: Review Lyndie’s goals on WPJS and update as appropriate.

☐ Step 2: Develop a new Employability Plan on WPAS that reflects Lyndie’s current situation.

☐ Step 3: Record activities on WPCS/WPCH.

WWP

☐ Step 1: Enter Lyndie’s job in the Work History app and update her Employment Status on the Work History page.
  o Include her supervisor as a contact.

☐ Step 2: Document all of Lyndie’s changes in PIN Comments.

☐ Step 3: Record Dmitry’s job readiness information on his Job Readiness page. Click Save.
Step 4: Click +Add PIN Comment from this page. Summarize Dmitry’s job readiness.
Dmitry’s Employment

A short time later, Dmitry finds full-time employment at an express lube and oil change shop. He will be earning $15.00 per hour and be paid bi-weekly. His duties will include conducting basic oil changes. Dmitry’s will receive his first paycheck in one week. At this time, the job does not include benefits, but Dmitry hopes that will change in the future. He provides his supervisor’s contact information as Jason Young jasony@expresslube.com.

The two of you review the results of his Career Locker career assessments and TABE scores. Dmitry’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 489.

You complete an informal assessment with Dmitry, and determine he is appropriate for a CMF+ placement. You update his placement and offer retention. He accepts the retention services, and they are provided.

Entries

CWW

☐ Step 1: Enter Dmitry’s job on the Employment page.
  ○ Note: refer back to Mariana’s instructions for how to make updates to the Employment page.

☐ Step 2: Run eligibility.
  ○ Remember 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 Dmitry’s placement on the W-2 Placement page to CMF+.

☐ Step 4: Document these changes on the Case Comments page.

WWP

☐ Step 1: Complete an informal assessment with Dmitry.

☐ Step 2: Update Dmitry’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 Dmitry’s employment situation.
System Entry Guide: Ongoing Processes

☐ Step 3: Record his career assessment information on the Career Assessment page.

☐ Step 4: Click +Add PIN Comment from this page. Summarize Dmitry’s career assessment.

☐ Step 5: Record Dmitry’s TABE scores in the Test Scores app.
  o Click +Add PIN Comment from this page. Summarize Dmitry’s TABE scores.

CARES

☐ Step 1: Review Dmitry’s goals on WPJS and update as appropriate.

☐ Step 2: Develop a new Employability Plan on WPAS that reflects his current situation.

☐ Step 3: Record his activities on WPCS/WPCH.

WWP

☐ Step 1: Enter PIN Comments summarizing all case changes and decisions. Be sure to include decisions related to placement and activities.

STOP  STOP  STOP

Send an email to PTTTrainingSupp@wisconsin.gov with:
  • the subject line “Lyndie Employment,” and
  • Lyndie’s and Dmitry’s PIN.

Your entries will be reviewed, and feedback provided. Use the feedback you receive to assist you in moving forward.
Job Loss/Re-Engagement

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

During your meeting, Dmitry explains that he sometimes drinks at night. This caused him to oversleep on occasion. While Lyndie leaves the room to care for Natasha, you ask Dmitry about his drinking. He explains that he had a problem in the past, but got over it and can do it again. Dmitry 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 Dmitry to determine appropriate placement and activities. Even with Dmitry’s job loss, you still feel at this time, he is the most employable. 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 Dmitry’s employment in CWW, end dating the employment and reporting the final check information.
  - Similar to when Dmitry 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: Run eligibility and confirm.
  o Check for Non-CMF/+ eligibility.
  o Confirm only if passing.

☐ Step 3: Update Dmitry’s placement on the W-2 Placement page.

☐ Step 4: Enter Case Comments.

CARES

☐ Step 1: Review and update WPJS, WPAS, WPCS, and WPCH.
  o Remember to include Dmitry’s AA meetings.
WWP

☐ Step 1: Complete an informal assessment for Dmitry.
  o Record necessary changes on the Work History page.
  o Record new information on the Participant Barriers page.

☐ Step 2: Record and document all changes in PIN Comments.

Stop Stop Stop

Send an email to PTTTrainingSupp@wisconsin.gov with:
  • the subject line “Lyndie Job Loss/Re-Engagement,” and
  • Lyndie’s and Dmitry’s PINs

Your entries will be reviewed, and feedback provided. Use the feedback you receive to assist you in moving forward.

Conclusion

Congratulations! You’ve work through many ongoing changes: placements, non-participation, employment, a person add, and retention. You’ve come a long way and have made a lot of changes to Mariana’s and Lyndie’s cases. After everything has been completed in this section, a trainer will email you your next steps.