

# *Trainer's Guide*

## **Focused Discussion for New FEPs**

(6 sessions)

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### **Purpose**

Offer a forum for new workers as they transition from training to actual caseloads that helps them through trouble spots, answers questions, points them to resources, and allows them to connect with each other.

### **Session Topics**

- DCF Forms
  - Alerts and Worker Tasks
  - Participation Tracking
  - Placement Determination
  - Education and Job Skills Training Policies
  - Work Participation Rate (WPR)
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**Table of Contents**

**TABLE OF CONTENTS..... 2**

**DCF FORMS SESSION ..... 4**

Welcome and Announcements/Updates..... 4

Topic of the Month: DCF Forms..... 5

Energizer ..... 11

Website of the Month: 211 ..... 11

Knowledge Exchange ..... 12

Closure ..... 12

**ALERTS AND WORKER TASKS SESSION ..... 13**

Welcome and Announcements/Updates..... 13

Topic of the Month: Alerts and Worker Tasks..... 13

Energizer ..... 20

Website of the Month: DCF Child Care Resources ..... 21

Knowledge Exchange ..... 22

Closure ..... 22

**PARTICIPATION TRACKING SESSION..... 23**

Welcome and Announcements/Updates..... 23

Topic of the Month: Participation Tracking..... 23

Energizer ..... 28

Website of the Month: ADRC (Aging & Disability Resource Center) ..... 30

Knowledge Exchange ..... 31

Closure ..... 31

**PLACEMENT DETERMINATION SESSION ..... 32**

Welcome and Announcements/Updates..... 32

Topic of the Month: Placement Determination..... 32

Energizer ..... 39

Website of the Month: Job Center of Wisconsin for FEPs..... 40

Knowledge Exchange ..... 41

Closure ..... 41

**EDUCATION AND JOB SKILLS TRAINING POLICIES SESSION ..... 42**

Welcome and Announcements/Updates..... 42

Topic of the Month: Education and Job Skills Training Policies ..... 42

Energizer ..... 48

Website of the Month: Job Center of Wisconsin for Participants ..... 48

Knowledge Exchange ..... 49

Closure ..... 50

**WORK PARTICIPATION RATE (WPR) SESSION..... 51**

Welcome and Announcements/Updates..... 51

Topic of the Month: WPR ..... 51

Energizer ..... 58

Website of the Month: Online Learning..... 60

Knowledge Exchange ..... 61

Closure ..... 61

**TN APPENDIX A – INFORMATION TO ADD TO THE CHAT BOX..... 62**

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**Materials**

- Trainer's Guide
- PPT – be sure to share your sound
- Notes handout in electronic form
- Laptop
- Webcam
- Headset
- Link for the Zoom session
- Open case and access to CWW and WWP for any questions that come up
  - Hannah Hub is available if needed (C: 1104338114, P: 1205721797)

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**Suggested Pace**

Each session is one hour. The following agenda is the suggested pace for each session.

5 minutes: Welcome and Announcements/Updates from PTT

20 minutes: Session Topic of the Month

5 minutes: Energizer

10 minutes: Website of the Month

15 minutes: Knowledge Exchange

5 minutes: Closure

**Note to Trainer:** Prior to each session, gather any announcements or updates. Check with the Leads about PTT, policy, or system updates. Look for any recent Ops Memos to point out, etc.

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**DCF Forms Session**

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☀ PPT 1

☞ TN Appendix A

**Note to Trainer:**

- Have the following forms open on your computer (<https://dcf.wisconsin.gov/forms>)
  - Wisconsin Works W-2 Formal Assessment Agreement (2565)
  - Authorization for Disclosure of Confidential Information (10779)
  - Voluntarily Declining Aid (2233)
- 15 minutes prior to the session, display the PPT (share sound). Greet learners as they arrive, and complete audio checks with them. Upload the notes handout. The TN Appendix contains text to paste into the chat for the notes handout and phone number if they don't have audio on their computer.
- At session start, click on the paper icon, which is the Forms session.
- Be sure to document who attended the session, and submit the Focused Discussion for New FEPs Class Information sheet to Reg Staff.

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**Welcome and Announcements/Updates**

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**Purpose:** Share recent and upcoming news or information pertinent to learners.

**Estimated Time:** 5 minutes

☀ PPT 2 (Click the paper icon from PPT 1)

**Turn on** webcams for the welcome.

We're glad you were able to find time in your schedule to join us today.

Before we dive in, we have a few updates to share with you.

*[Share any announcements or updates you identified for this session.]*

We're also highlighting two Learning Center resources you may want to check out. Our Chronic Medical Issues series covers topics such as depression, methadone, and mental illness. In our Training on Demand videos, you'll find a video that shows you how to document a referral for a formal assessment in WWP, as well as a video on documenting a completed formal assessment.

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**Topic of the Month: DCF Forms**

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**Purpose:** Provide a refresher or additional instruction on everyday W-2 case management tasks.


**Estimated Time:** 20 minutes

This month's topic focuses on DCF forms: forms that you must provide to all applicants, forms you typically use with ongoing participants, and where to find the forms. If you haven't noticed, W-2 has a lot of them! Some forms you use regularly, and others only when needed. You can find forms in multiple places.

### PPT 3



All W-2 forms and publications are available on the Department of Children and Families (DCF) website, using their Forms Search page. This site does contain forms for other DCF programs such as Child Care and Child Support.

 Simply click on the title of the form to open it. The form opens as a PDF or a Word Document as indicated under the  Type column. The  Language column indicates if the form is available in other languages.


Because this page contains so many forms, the fastest way to find something is to use the  Search field.

### PPT 4

Let's review ways you can search for forms on this page. As I go through the options, use your Reactions in Zoom to display a thumbs up if the Forms Search page allows the type of search, or to display a thumbs down if it doesn't. Give me a thumbs up if you're ready. **(Pause)**


 Our first option is form number. Use a thumbs up if you think you can search by the form number, or a thumbs down if you cannot. **(Pause)**  Searching by form number is an option. You do not need to put the letters that precede the number in the search.

### PPT 5


How about searching by the code in the upper right corner? Will searching by the code work? **(Pause)**  You cannot search for a form this way. This code indicates the code used when storing the form in ECF.

 PPT 6

Next is searching by a keyword in the form title. Is this an allowable search? **(Pause)**


 Yes, the Forms Search page will display results for any form with that keyword in the title.

 PPT 7

How about searching for a keyword that may be associated with that form, such as assessment? **(Pause)**  This will not work. For example, searching for the word assessment will not pull up the mental health report form or the medical capacity form because that word is not in the form title.


 PPT 8

Lastly, can you search by acronym, such as EP, or program, such as W-2? **(Pause)**


 If those terms are not part of the form title, you will not get any search results. Not all forms have W-2 in the title, so searching for W-2 will not give you a list of all forms for the program.


 PPT 9


Another place you can find links to forms is in the W-2 Manual. You'll see form links throughout various chapters, such as the W-2 Formal Assessment Agreement form mentioned in the chapter on formal assessments.

 W-2 Manual 1.4.6 covers required W-2 forms and publications during the application process, and includes direct links to those forms for you to access. Let's talk about these forms a little more.







 PPT 10

Per policy, you must provide anyone requesting assistance of any kind from the W-2 agency with the  W-2 Benefits and Services Offered at Wisconsin Works Agencies brochure. If an individual inquires specifically about the W-2 program, you must give

them the  What to Bring with You form. The other form you must provide during the

request process is the  Domestic Violence brochure. This brochure must be given out during the appointment with the Resource Specialist, and the individual must be given the option to take it with them or leave it behind.

 PPT 11

As you move into the application process with an individual, there are several forms you must provide. These forms include:  W-2 Rights and Responsibilities;  Wisconsin Works (W-2) Participation Agreement;  Good Cause Notice;  Notice of Assignment: Child Support, Family Support, Maintenance, and Medical Support; and the  TANF Electronic Benefit Transfer Transaction Restrictions Flyer. W-2 Manual 15.1.3 also mentions that you must give the  Your Guide to W-2 Services, Cash Benefits Programs, & Child Support brochure to applicants referred to or already receiving child support services.

**Ask** Which of these forms must you provide to individuals at times other than the application process? Use your stamp annotation tool to mark all the forms you must provide at other times, per policy.

*Answers:*

- *Good Cause Notice – you must provide this form when a child is added or a parent leaves the household, at reapplication, and any time a participant discloses circumstances where good cause may be needed.*
- *TANF Electronic Benefit Transfer Transaction Restrictions Flyer – you must provide this flyer to participants at their eligibility reviews.*

Your agency may have internal policies about providing some of these forms at times other than application.






*[clear annotations]*

Remember, although you see and use these forms regularly, they are new to applicants, and it is important to cover them thoroughly.

**Ask** What other forms do you use on a regular basis with ongoing participants?

*Responses will vary.*

 PPT 12

As we mentioned, you use only some forms when needed or for a specific circumstance. Reviewing policy in the W-2 Manual helps you know when you might need a form you don't use as often. Circumstances such as a  Learnfare participant, an  at-risk pregnancy applicant,  setting up a new worksite or TEMP employer,  time limit extensions, and  setting up electronic funds transfer all require special forms.


 PPT 13

The final place you can find links to certain forms is in WWP. Various pages contain forms that go along with the information you need to enter, such as a formal assessment.

 PPT 14

The Wisconsin Works W-2 Formal Assessment Agreement form is a common form, along with the Authorization for Disclosure of Confidential Information, often referred to as a release of information, and the Voluntarily Declining Aid form.

Use your stamp annotation tool to vote for one of these forms that you want us to look at in more detail.




**Note to Trainer:** Start with the form that has the most votes by pulling it up on the screen and covering the information listed below. Continue covering the other forms based on votes as time allows. Use your mouse, or the annotation spotlight tool to highlight areas on the forms indicated with .





*[clear annotations]*


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### Wisconsin Works W-2 Formal Assessment Agreement

You must complete the Formal Assessment Agreement form any time you refer a participant for a formal assessment due to a potential barrier. Even if you know the participant plans to decline the referral, you need to complete this form with the participant.

The first page of this form asks for basic information. You fill in the  participant's information, check the  type or types of formal assessment you are referring them for, and discuss how you will  use the information.



On the  second page, the information in numbers 1-5 answers some common questions participants may have about  cost,  confidentiality, and  what happens if they choose not to do a formal assessment.




Below that is a place to check whether the  participant agrees or declines, and signature lines for the participant and you.

**Ask** What additional questions do you have about this form?

### Authorization for Disclosure of Confidential Information


The Authorization for Disclosure of Confidential Information form, or Release of Information as most people call it, contains a lot of information. It can be difficult to know if you are filling it out correctly.



Start by filling out the  participant's information in the first set of boxes. Next, complete the information for  you and your agency. It helps to be as specific as possible by listing not only your agency name, but also your name if you are the primary contact for this participant.

Check the  Disclose to box if you only want to be able to give information to another provider. Check the  Receive from box if you only want to get information from another provider. Check the  Or exchange information with box if you want to be able to share information with another provider about the participant **and** have the provider share information with you. This is the most common option.

**Ask** What is the benefit of exchanging information with another agency or provider regarding a participant?

*Possible Answers: explain participant's goals/activities in the W-2 program, coordinate activities/appointments, understand accommodations needed, check progress, resolve issues.*

Moving down to the next set of boxes, enter the information for the  agency or provider with which you want to share information. Again, if there is a specific person at the agency, be sure to list their name and direct phone number.




Next,  check the boxes for the information you want disclosed by either the W-2 agency or the other agency. Note, there is a box called  Specific Request. Check this box and type in the information you want included. The boxes you check depend on the participant's situation and what information may be beneficial to you or the other provider.

**Note to Trainer:** If time is tight, skip these two examples.

1. Let's say a participant is struggling to get some records regarding their most recent SSI application that was denied. They worked with an attorney for this application and have given you permission to contact that attorney. **Ask** Which boxes might you check for this situation? Use your annotation tools to put a mark next to them. (**Pause** to allow time for annotating.)

*Possible Answers: Legal, Legal Records. You also may check information about various evaluations if you know that lawyer has them, and could add a specific request indicating you want information about the SSI application denial information.*





2. Another example could be a participant working with an AODA counselor. **Ask** What boxes might you check if you want to get information about the participant's progress and share the participant's progress in the W-2 program?  
*Possible Answers: Alcohol and Drug, Alcohol/Drug Initial Assessment/Evaluation, Attendance Records, Urinalysis Results, Treatment Plans, AODA Progress Summaries*

At the bottom of the page, indicate how long the release is valid. If you do not add anything here, the release automatically expires  one year from the date of signature. Otherwise, you can add a  specific date or a  specific action for when the release expires.

The second page requires signatures of the participant and you. Keep in mind that some agencies also will want their own release form signed by the participant in addition to this one.

**Ask** What additional questions do you have about this form?

### Voluntarily Declining Aid

The Voluntarily Declining Aid form serves one purpose, which is to document that a participant no longer wants to receive assistance. Use this form when the participant's situation has changed, and they no longer want to be in the program. Add the  participant's name,  case number, and  the program they are declining. Then, ask the participant to sign it. As indicated at the top,  it is not necessary for the participant to sign this form, but it would help with accurate record keeping.

**Ask** What additional questions do you have about this form?

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### PPT 15

Remember, forms are one piece of the documentation process. Any time you complete a form with a participant, there is additional documentation to complete in WWP or CWW as well as in PIN or Case Comments.

Be sure to access the DCF Forms Search, W-2 Manual, or WWP when you need a form. This ensures you always use the latest version of that form.

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**Energizer**

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**Purpose:** Give learners a quick brain break.

**Estimated Time:** 5 minutes

 PPT 16

Before we showcase our website of the month, let's pause and reboot our minds with a brain break by playing Would You Rather. Use your stamp annotation tools to choose one option from each box that you would rather do.

**Allow** up to four minutes for learners to annotate.

Now that we've had a moment to recharge, we'll talk about the 2-1-1 website.

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**Website of the Month: 211**

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**Purpose:** Showcase an external resource that learners can use in case management.


**Estimated Time:** 10 minutes


 PPT 17

The 2-1-1 Wisconsin website is your one-stop connection to the local services you need, like utility assistance, housing, food, elder care, crisis intervention, alcohol, and other drug recovery, and much more. You can access information through the online database, chat, phone call, or text.


 PPT 18

You can start the search right from the home page by  entering what you're looking for and a zip code. You can enter more than one search item. This type of search displays area resources that match your search and gives you advanced search options.


 You also can try a guided search for a plethora of resources about a specific topic.

 This search not only leads you to community resources, but also provides information on the topic, has links to screenings, and much more.

 PPT 19

Next, it's your turn to spend some time exploring this website. Go ahead and search for information you might need, see how to navigate the site, and note some benefits this site might have for you and participants. We have put the link in the chat.  You have five minutes.

**Note to Trainer:** Put the website link in the chat <https://211wisconsin.communityos.org/>.

 **Start** the 5-minute timer. After the timer ends, invite the learners back and ask the debrief questions below. Ask for at least two volunteers for each question.

### Debrief Questions

- What's something that stood out to you about this website?
- In what ways could this website be beneficial to you as a Case Manager?
- In what ways could this website be beneficial to a participant?

Thank you for sharing information about this website.

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### Knowledge Exchange

**Purpose:** Answer learner questions and encourage sharing among learners.

**Estimated Time:** 15 minutes

#### PPT 20

We now have time dedicated to share ideas, experiences, and expertise. You also can ask a trainer to show you a process in CWW or WWP, or pose other questions to us or each other. Take a look at the sentence starters on the screen. Choose a sentence starter to complete.

Let's hear from a few of you. **Ask** Who is ready to share what they chose?

**Note to Trainer:** Depending on the size of the group and the time left, you could ask each person to share. You also could ask if anyone chose the "A question I have" starter first, and move on from there. As people share, encourage others to comment, give a thumbs up if they have experienced the same thing, or ask follow-up questions.

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### Closure

**Purpose:** Identify learners' takeaways from the session.

**Estimated Time:** 5 minutes

#### PPT 21

Before you leave us today, please share your thoughts. Use your text annotation tool to add one thought about the value or impact of our discussion today and how it can help you in your work. After you've added your thought in the bubble, feel free to switch to your stamp annotation tool and put stamps next to others' thoughts that resonate with you.

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## Alerts and Worker Tasks Session

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☀ PPT 1

👉 TN Appendix A



### Note to Trainer:

- 15 minutes prior to the session, display the PPT (share sound). Greet learners as they arrive, and complete audio checks with them. Upload the notes handout. The TN Appendix contains text to paste into the chat for the notes handout and phone number if they don't have audio on their computer.
- At session start, click on the triangle/exclamation point icon, which is the Alerts and Worker Tasks session.
- Be sure to document who attended the session, and submit the Focused Discussion for New FEPs Class Information sheet to Reg Staff.

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## Welcome and Announcements/Updates

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**Purpose:** Share recent and upcoming news or information pertinent to learners.

**Estimated Time:** 5 minutes

☀ PPT 22 (Click the triangle/exclamation point icon from PPT 1)

**Turn on** webcams for the welcome.

We're glad you were able to find time in your schedule to join us today.

Before we dive in, we have a few updates to share with you.

*[Share any announcements or updates you identified for this session.]*

This month's topic is Alerts and Worker Tasks. Today we'll be talking about how to use your Alerts and Worker Tasks to stay on top of your caseload and ensure tasks are being addressed.

We also are highlighting two Learning Center resources you may want to check out. The Client Scheduling course walks you through how to set up and use your calendar in CWW. The W-2 Alerts and Worker Task List Reference Guide provides instructions on how to work your alerts in CWW, check your Worker Task List, and create manual Worker Tasks in WWP. You'll also find an Alerts Table and Work Task List Table desk aid within the reference guide course.

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## Topic of the Month: Alerts and Worker Tasks



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**Purpose:** Provide a refresher or additional instruction on everyday W-2 case management tasks.






**Estimated Time:** 20 minutes

 PPT 23


We're going to get started by looking at alerts in CWW. Alerts in CWW are related to a participant's eligibility. You view these alerts on the  **Action Items** panel of their case record. Keep in mind, some alerts may be for both FEPs and IM workers.

 Clicking the check box next to the worker ID indicates the alert has been acted on and completed. To clear the completed alert, click the  **Clear Checked Action Item(s)** button.

 PPT 24

You also may search for alerts under the  **Worker Tools** section of the navigation menu by clicking the **Case Management** tab and selecting the  **Caseload Management Search** criteria page. You must complete the fields in the  **Caseload Search Criteria** section, and you have the  option of narrowing your search results by entering information in the  **Additional Search Criteria** fields.


 PPT 25

Lastly, you need to choose an answer in the  **What would you like to do?** section of the page by selecting to view the cases, or the counts of cases, matching the criteria above.

 PPT 26


Now we're looking at some common CWW alerts and become more familiar with the Alerts Table desk aid. In a moment, you'll see an alert text on the screen. Using the Alerts Table desk aid that is part of the W-2 Alerts and Worker Task List Reference Guide, race to find the alert code and type it in the chat. To make this a bit easier, we'll provide the alert category. A link to the Alerts Table is also in the chat. Let's get started.


**Note to Trainer:** Add the Alerts Table link to the chat.

 The first alert category is Child Support. The alert text is on the screen. What is the alert code?

Text: NON-COOPERATION INFO. SEE IVDI/IVDE


Answer: 92


 This alert indicates the participant is not in cooperation with the child support agency. Look at the action column in the table. The column indicates you need to review the **Absent Parent** page. You may contact the participant directly to discuss the non-cooperation and the impact on the W-2 case. Send the non-cooperation letter to the participant.

 The Alert Category is Child Support. The text is on the screen. What is the Alert Code?

Text: NEW PATERNITY IND – SEE APGI


Answer: 305


 This alert generates when there is an update to the **Legal Parentage Status** on the **Absent Parent** page. Review the **Absent Parent** page to determine which steps to take next. For instance, you may need to add another parent to the existing case, forming a two-parent household.

 The next Alert Category is Child Care. The text is on the screen. What is the Alert Code?

Text: CC AUTH ENDS IN ONE WEEK


Answer: 211


 This alert occurs when a participant's childcare authorization is set to expire. Review the case and the participant's record in WWP to determine if a new childcare authorization is needed. Contact the participant if necessary.

 The next Alert Category is Employment. The text is on the screen. What is the Alert Code?

Text: CWW EMPLOYMENT PAGE CHANGE


Answer: 134


 This alert indicates that a change occurred on an **Employment** page associated with the case. You may want to check **Case Comments** first to see if a comment has been made indicating what change occurred. Review the **Employment** page for updates and run eligibility. You also need to document any action you take in **Case Comments**. Depending on the change that occurred, you also may need to take action in WWP.

 The next Alert Category is Data Exchange – SSI/SSDI. The text is on the screen. What is the Alert Code?

Text: NEW SS INCOME ADDED


Answer: 371


 This alert generates when someone in the household now is receiving social security income. If it is the custodial parent, and they are the only parent on the case, you would need to take steps to close the case. If a child is receiving social security income, it would not impact eligibility, but you still need to update the **Benefits Received** page, the **Unearned Income** page, and potentially the **Family Barriers** page in WWP.

 The next Alert Category is Miscellaneous. The text is on the screen. What is the Alert Code?

Text: CONFIRM AGECE IF CORRECT


Answer: 74

 This alert indicates that another worker ran eligibility, and you need to confirm if the W-2 eligibility result is correct. First, check **Case Comments** to find out why eligibility was run. Check pages associated with the change, as needed. Determine if the eligibility result is correct and confirm it. If it is not correct, make the necessary changes and run eligibility.


 The next Alert Category is Reviews – Eligibility and Work Programs. The text is on the screen. What is the Alert Code?

Text: CASE IN REVIEW MODE > 30 DAYS

Answer: 418

 This alert occurs when the case has been in review mode for over 30 days. Complete the review and add **Case Comments**.

## PPT 27

It may be helpful to keep the CWW Alerts Table handy to use as a reference when working your alerts in CWW.  The action column goes over the steps to take. Remember to run eligibility when making any changes in CWW.


## PPT 28

Worker Tasks in WWP are similar to alerts in CWW. Worker Tasks are a combination of system generated tasks you need to complete and tasks you manually enter. These tasks roll up into the **Worker Task List**.




**Ask** How many W-2 System Generated Worker Task types are there? Type your guess in the chat.


Answer: 16

 PPT 29

You also can create manual tasks from inside the participant record by using the  +Add Worker Task button.

 PPT 30

There are a few different options you can use to find and view your tasks. You can enter a key word in the  **Search** field, or filter by  **Category Type**. Another option is to sort your worker tasks by  **Date** or **Date and Priority** by clicking the **Sort By** box and selecting an option from the dropdown.

After finishing a task, click the  **Quick Complete** button to complete the task and remove it from your list.

**Note to Trainer:** If asked, you are not able to view tasks after they are marked as complete. It is best practice to enter a manual task if a task is marked as complete in error.

**Ask** What manual tasks might be helpful to create? Unmute or type your responses in the chat.

*Possible Responses:*

- *Follow up with a worksite supervisor*
- *Schedule an eligibility and/or EP review*
- *Time limit conversations*
- *Get a new formal assessment*

 PPT 31

In a moment, you will see a system generated task on the screen. Using your stamp annotation tool, mark on the **Case Management Navigation** toolbar to indicate which page or app you need to access to address this task. There could be more than one answer.


 No PIN Comments in the last 30 days

*Answers: Transactions, PIN Comments*

This task generates when no PIN Comments have been entered within the last 30 days.

You may start by reviewing the **Transactions** page for any recent updates that occurred. Review the **PIN Comments** page to help you determine what action you need to take next, then add new PIN Comments to document the action you take.

*[clear annotations]*


 No test scores have been documented yet in the test scores app at the initial EP after enrollment. Education Needs Assessment Due.

*Answers: Test Scores, Employability Plan, PIN Comments*

This task generates when test scores are not documented within the Test Scores App when the initial EP is submitted after enrollment.

Start with the Test Scores App to check if any test scores are entered. You also can check the Employability Plan to see if the participant was assigned to complete an Educational Needs Assessment. Based on your findings, you must contact the participant to find out if an Educational Needs Assessment was completed, or if an appointment is needed to update the participant's EP to include the Educational Needs Assessment as an activity. Be sure to document all action you take in PIN Comments.

*[clear annotations]*

 A job that is associated with the current EP was edited. A new EP may be needed.

*Answers: Informal Assessment, Work History app, Employability Plan, PIN Comments*

This task is generated when a job was included on the submitted EP, and the job then was edited from the **Work History** page.

Access the **Work History** page or app to review the edits made to the job record. Then you may need to review the **Employments** page of the EP to determine if an update is needed. Also check **PIN Comments** to see if comments were entered previously regarding the update, and enter any necessary comments regarding action you took based on the task.

*[clear annotations]*

 Informal Assessment not submitted within 10 days prior to placement change.

*Answers: Informal Assessment, PIN Comments*

This task generates when a participant's placement changes or a new placement is made, and no Informal Assessment was submitted within the 10 days prior to the placement begin date or on the same day as the placement began.


Check the status of the Informal Assessment. An Informal Assessment may have been completed, but never was submitted. Or, you may find that an Informal Assessment needs to be completed, in which case you would contact the participant to schedule an appointment to complete the Informal Assessment. As always, check PIN comments to review any prior action taken and add any comments detailing your actions.

[clear annotations]

Nice job working through the W-2 System Generated Worker Tasks! Remember, with any tasks included on the Task List, only mark them complete after you have completed all the necessary steps to resolve the task.

## PPT 32

Finding a way to incorporate Alerts and Worker Tasks into your daily work routine is a key element of good case management. Failure to act on these can cause undue hardship on participants and their families, along with severe consequences for you and your agency.

 On the screen, we have six icons, along with a scrambled word, which represent one or more potential implications that may result from failing to act on an alert or task. Unmute or type in the chat to make a guess.

**Note to Trainer:** The **bold** words listed below are the scrambled words on the screen, and the corresponding icon is in parentheses. When a word is guessed correctly, **click** the scrambled word. After learners unscramble all the words, go through the bullet points.

- (Family) - **Families** not receiving appropriate services, activities, and/or resources
- (Safety Pin) - Family **safety** may be put at risk: domestic violence, child abuse/neglect (not processing good cause claim for Child Support appropriately)
- (Money) - Incorrect **payments** and/or incorrect case closures resulting in financial consequences; Loss of Performance Outcome Payments
- (Child Care) - Negative impacts to **Child Care** authorizations
- (Computer Monitor) - Errors in W-2 **eligibility** determination
- (Magnifying Glass) - Compliance **monitoring** impacts; Fact Finding

**Ask** What may be some additional consequences of failing to act?

*Responses may vary.*

## PPT 33

Let's look at some best practices you can put into action to help you manage your Alerts and Worker Tasks.

Review the list on the screen. Use your stamp annotation tool to put a star next to the best practices you already use regularly.

Now use your stamp annotation tool to put a heart next to the one you want to get into the habit of using regularly.

**Note to Trainer:** If you notice an abundance of stars next to a certain best practice, ask learners to share a tip.

*[clear annotations]*

**Ask** What are other best practices you can use regarding alerts and worker tasks?  
*Responses will vary.*

### PPT 34

As previously mentioned, best practice is to act on alerts and worker tasks as soon as you are able. You may want to set aside time each day to check them, as this will make your job easier in the long run, and will help you to better serve participants.

---

## Energizer

**Purpose:** Give learners a quick brain break.

**Estimated Time:** 5 minutes

### PPT 35

Before we showcase our website of the month, let's pause and reboot our minds with a brain break by identifying the differences between the two photos. Use your annotation tools to circle the differences on the right photo.

**Allow** up to two minutes for learners to annotate. When all seven differences are identified, or two minutes are up, move to the next slide.

### PPT 36

Here are the seven differences we spotted between the two pictures. Let's try another one.

### PPT 37

This time, we are looking for eight differences. Again, use your annotation tools to circle the differences on the right photo.

**Allow** up to two minutes for learners to annotate. When all eight differences are identified, or two minutes are up, move to the next slide.

### PPT 38

Here are the eight differences we found between these two pictures.

Now that we've had a mini beach break and a hot air balloon adventure, let's talk about the DCF Child Care Resources website.

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### Website of the Month: DCF Child Care Resources

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**Purpose:** Showcase an external resource that learners can use in case management.

**Estimated Time:** 10 minutes


#### PPT 39

The Wisconsin Department of Children and Families General Wisconsin Child Care Information and Links website provides a plethora of information and resources that are useful for workers and participants alike. Some of the most common links you may use include the  Wisconsin Shares page and  Youngstar.


Parents with young children need to have childcare in place in order to participate in W-2 activities and maintain employment.

#### PPT 40


The Wisconsin Shares page provides information about the Wisconsin Shares Child Care Subsidy Program. There are resources available for parents seeking a Child Care Subsidy, along with resources for workers wanting to know the latest on Wisconsin Shares policies and procedures.

 Youngstar provides parents seeking childcare with the tools and resources they need to research potential childcare centers and make the best decision for their families.

#### PPT 41

Now, it's your turn to spend some time exploring this website. Go ahead and search for information you might need, see how to navigate the site, and note some benefits this site might have for you and participants. We have put the link in the chat.  You have five minutes.

**Note to Trainer:** Put the website link in the chat - <https://dcf.wisconsin.gov/childcare>.

 **Start** the 5-minute timer. After the timer ends, invite the learners back and ask the debrief questions below. Ask for at least two volunteers for each question.

**Debrief Questions**

- What's something that stood out to you about this website?
- In what ways could this website be beneficial to you as a Case Manager?
- In what ways could this website be beneficial to a participant?

Thank you for sharing information about this website.

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**Knowledge Exchange**

**Purpose:** Answer learner questions and encourage sharing among learners.

**Estimated Time:** 15 minutes

 PPT 42

We now have time dedicated to share ideas, experiences, and expertise. You also can ask a trainer to show you a process in CWW or WWP, or pose other questions to us or each other. Take a look at the sentence starters on the screen. Choose a sentence starter to complete.

Let's hear from a few of you. **Ask** Who is ready to share what they chose?

**Note to Trainer:** Depending on the size of the group and the time left, you could ask each person to share. You also could ask if anyone chose the "A question I have" starter first, and move on from there. As people share, encourage others to comment, give a thumbs up if they have experienced the same thing, or ask follow-up questions.

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**Closure**

**Purpose:** Identify learners' takeaways from the session.

**Estimated Time:** 5 minutes

 PPT 43

Before you leave us today, please share your thoughts. Use your text annotation tool to add one thought about the value or impact of our discussion today and how it can help you in your work. After you've added your thought in the bubble, feel free to switch to your stamp annotation tool and put stamps next to others' thoughts that resonate with you.

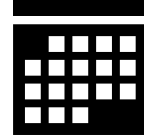
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## Participation Tracking Session

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☀ PPT 1

👉 TN Appendix A



### Note to Trainer:

- 15 minutes prior to the session, display the PPT (share sound). Greet learners as they arrive, and complete audio checks with them. Upload the notes handout. The TN Appendix contains text to paste into the chat for the notes handout and phone number if they don't have audio on their computer.
- At session start, click on the calendar icon, which is the Participation Tracking session.
- Be sure to document who attended the session, and submit the Focused Discussion for New FEPs Class Information sheet to Reg Staff.

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### Welcome and Announcements/Updates

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**Purpose:** Share recent and upcoming news or information pertinent to learners.

**Estimated Time:** 5 minutes

PPT 44 (Click the calendar icon from PPT 1)

**Turn on** webcams and **introduce** trainers.

We're glad you were able to find time in your schedule to join us today.

Before we dive in, we have a few updates to share with you.

*[Share any announcements or updates you identified for this session.]*

This month's topic is Participation Tracking and Good Cause. We're going to take a look at the **W-2 Participation Calendar** page, review good cause policy, and discuss some best practices for entering participation.

We also are highlighting two Learning Center resources you may want to check out. The W-2 Overpayments and Auxiliaries: Calculations and Action course defines overpayments and auxiliaries, and provides an overview on how to calculate and process them. The W-2 Participation Tracking Desk Aid helps you navigate how to enter the necessary participation and good cause entries in WWP.

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### Topic of the Month: Participation Tracking

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**Purpose:** Provide a refresher or additional instruction on everyday W-2 case management tasks.

**Estimated Time:** 20 minutes

 PPT 45






Let's begin by looking at the **W-2 Participation Calendar** page. We are not going to cover every field or every type of entry. We will cover some key pieces of information you encounter when entering participation.

 PPT 46




Sometimes, participants complete their activities on days that do not match their schedule, making up their hours. Participants have the flexibility to make up hours within the same calendar week, Sunday to Saturday.  You must enter **Make-Up Hours** in WWP for accurate record keeping.

**Ask** How many of you have entered Make-Up Hours for a participant? In the chat, put a Thumbs Up if you have or a Thumbs Down if you haven't.

 PPT 47

Participants can make up hours all on one day. For example, Terra is assigned  1 hour of employment search each day. Instead of completing 1 hour a day, she completed 5 hours on Friday. When you enter her participation, you must enter 1 make up hour on  Monday,  Tuesday,  Wednesday, and  Thursday.

 PPT 48

On the flip side, participants also can make up hours on more than one day. For example, Terra is scheduled to complete 4 hours of work experience every weekday and completes only 2 hours on Wednesday. She completes 5 hours of work experience on Thursday and 5 hours of work experience on Friday. For Wednesday,  enter the 2 hours she completed, then  click the + Add Make-Up Hours button two times to enter the  additional hours made up on Thursday and Friday.


 PPT 49

After entering participation information, the calendar shows a summary of the information.

**Ask** What are the case management benefits of the **W-2 Participation Calendar**?  
*Possible Answers: color-coded to easily see what occurred, helps identify patterns of participation and non-participation*

 PPT 50

Just like the **W-2 Participation Calendar** can be helpful for identifying patterns, so can the **Non-Participation/Good Cause Details** page. This is a view only page that displays a record of all non-participation and good cause entered within participation periods.

Above the list-view is a  **Summary** table that provides a quick-glance view of the non-participation, good cause, and sanctionable hours for that participation period.

 PPT 51

Let's review some examples of ways both these pages help you identify patterns of participation. Our first example shows participation entries for independent employment search, Job Club, career assessment, and work experience activities.

**Ask** What patterns stand out to you when looking at this calendar?

*Targeted Response: The participant is completing all activities except one*

**Ask** When reviewing this calendar with a participant, what types of questions would you ask?

*Possible Responses: I notice you're not attending job club. Tell me what is going on with that activity?*

**Ask** What changes would you consider making to the participant's EP, based on this calendar?

*Possible Responses: Consider rescheduling the activity, if able. Remove the activity from the EP. Assign a different activity based on the participant's feedback.*

 PPT 52

Our calendar has changed. Look at these participation entries.

**Ask** What do you notice when looking at this calendar?

*Targeted Response: There are 0.5 hours of non-participation for every work experience entry.*

**Ask** When reviewing this calendar with a participant, what types of questions would you ask?

*Possible Responses: Tell me about your work experience? I noticed you seem to be missing 0.5 hours of your work experience each day. What is going on?*

**Ask** What changes would you consider making to the participant's EP, based on this calendar?

*Possible responses: Adjust the work experience schedule; change the number of assigned hours; provide resources based on the participant's reason (transportation, childcare, overlapping commitments, etc.)*

### ☀ PPT 53

Our participation entries look different again.

**Ask** What pattern stands out to you when looking at this calendar?

*Targeted Response: The participant is completing all activities.*

**Ask** When reviewing this calendar with a participant, what types of questions would you ask?

*Possible responses: It looks like you are completing all your activities, I'd like to hear how everything is going. What is working well for you? Describe what the last two weeks have been like for you. Are there any other activities you'd like to try?*

**Ask** What changes would you consider making to the participant's EP, based on this calendar?

*Possible responses: Increase weekly hours overall; add additional time to current activities; introduce new activities; re-evaluate the participant's goals, complete any goal steps, create new goals.*

### ☀ PPT 54

Our last example looks at the **Non-Participation/Good Cause Details** page.


**Ask:** What patterns might you see from this page, that you cannot see when viewing the calendar?


*Possible Response: Able to see the total amounts of Non-Participation Hours, Good Cause Hours, and Sanctionable hours; can quickly compare to previous months*

**Ask:** What are the benefits of the information found on this page?

*Possible responses: Able to see a breakdown of the overall month, with totals for Non-Participation Hours, Good Cause Hours, and Sanctionable hours; the summary section provides a snapshot of the hours and is easy to compare to previous months; information displayed in a table format, which may be preferred by some people*


### ☀ PPT 55

When entering participation, don't forget about the handy  Full Participation and No Participation buttons that appear on the calendar. Use these buttons to your advantage

when entering participation information.  Even if you use these buttons to complete the entries for the week, you can still edit individual entries as needed, such as adding participant reasons for non-participation and good cause determinations.

## PPT 56

Speaking of good cause, remember that both you and participants play a role in determining good cause for missed activities. Participants must contact you with a reason for missing the activity within 7 working days of the scheduled activity. Then it is up to you to determine if the reason meets any of the W-2 Good Cause Reasons.

 The W-2 Manual includes Good Cause Reasons, and additional information on approving or denying good cause. When determining if good cause should be granted, remember to refer to the manual for guidance.

In some cases, a participant's reason for not completing assigned activities may fall into a grey area. As a Case Manager, you need to use your best judgement to determine if you will grant good cause. If you are unsure, it may be helpful to discuss the situation with a colleague or supervisor to help you make a decision. Above all, remember that you need to be consistent across your entire caseload when granting good cause.

## PPT 57

Let's look at some scenarios and determine if the participant has good cause.

After you've read the scenario, answer the polling question, indicating if you will approve or deny good cause based on the participant's reason for the non-participation. We'll also put the link to the W-2 Manual in the chat in case you want to pull up Chapter 11.2 to look at the good cause reasons.

**Note to Trainer:** Add W-2 Manual link in the chat.

The scenarios are written with the intent to spark discussion among learners regarding good cause determination. After the poll results are displayed for each scenario, ask at least one of the following questions:

- Why did you choose to approve or deny good cause?
- What other information or verification will you need?
- Based on this situation, what future steps will you take?

### **Poll 1 - Pam**

Pam reports she had to leave job club early, as she received a call from her daughter's school informing her that her daughter was stung by a bee. What is your good cause determination?

**Poll 2 - Katie**

Katie sent you an email stating she is unable to complete activities for the next week, as her grandmother passed away and she needs to travel to Chicago for the memorial service. What is your good cause determination?

**Poll 3 - Karen**

On March 1, Karen informs you she will not be able to complete any activities during the third week of March, as her children will be on spring break from school. What is your good cause determination?

**Poll 4 - Cathy**

You've noticed that Cathy is habitually a half hour late to her work experience site each week. When you ask her about this, she states she is often late because she relies on the bus for transportation. What is your good cause determination?

**Poll 5 - Emily**

Emily missed three days of activities last week, reporting she was unable to complete them due to inclement weather. What is your good cause determination?

Thanks for sharing your thoughts as we worked through these scenarios. Sometimes determining good cause can be a bit tricky, so it can be helpful to discuss certain situations with a colleague or supervisor.

 PPT 58

Participation tracking and good cause are fundamental pieces of W-2 case management. As a Case Manager, it is your responsibility to complete participation tracking entries accurately and timely. When deciding whether to grant good cause, you must be consistent and fair, keeping with the parameters outlined in the W-2 Manual.

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**Energizer**


**Purpose:** Give learners a quick brain break.

**Estimated Time:** 5 minutes

We are going to step away from participation tracking and give our brains a little break. You will see riddles/brain teasers appear on the screen. When you know the answer, you can unmute and give a shout out or type the response in the chat.

 PPT 59

What is as big as you are, and yet doesn't weigh anything?

 Your Shadow

 PPT 60

I can run but can't walk, I have a mouth but can't talk, a head but can't think, and a bed but can't sleep. Who am I?

 A River


 PPT 61

Paul's height is six feet, he's an assistant at a butcher shop, and wears size 9 shoes. What does he weigh?

 Meat

 PPT 62

You can hold it without using your hands or arms. What is it?

 Your Breath


 PPT 63

How many seconds are there in a year?

 Twelve. The 2<sup>nd</sup> of January, 2<sup>nd</sup> of February, 2<sup>nd</sup> of March... 2<sup>nd</sup> of December

 PPT 64

What goes up, but never comes down?

 Your age

 PPT 65

You throw away the outside and cook the inside. Then you eat the outside and throw away the inside. What did you eat?

 An ear of Corn

 PPT 66

When you have me, you feel like sharing me. But if you do share, you don't have me.  
What am I?

 Secret

We often need to give our brains a break from the world of W-2 and case management to re-focus and re-charge. This can be done in many ways, and these brain teasers are just one example. Now it's time for our website of the month.

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### **Website of the Month: ADRC (Aging & Disability Resource Center)**

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**Purpose:** Showcase an external resource that learners can use in case management.

**Estimated Time:** 10 minutes




 PPT 67

The ADRC website offers unbiased information about navigating through life experiences related to aging and/or living with a disability. Some of the resources offered by the ADRC include in-home care, housing options, housekeeping services, adaptive equipment, and caregiver supports and respite.


 PPT 68

Scroll to the bottom of the page and click the link to  Find an ADRC in your area.


 PPT 69

You can either click on your county on the map, or click on the  name of your county in the list. This will bring you to  the page with the contact information and address for the ADRC office that serves your county. Clicking the  ADRC of (your region or county's name) will direct you to the individual page for your county.

 PPT 70

Next, it's your turn to spend some time exploring this website. Go ahead and search for information you might need, see how to navigate the site, and note some benefits this site might have for you and participants. We have put the link in the chat.  You have five minutes.

**Note to Trainer:** Put the website link in the chat <https://www.dhs.wisconsin.gov/adrc/index.htm>.

 **Start** the 5-minute timer. After the timer ends, invite the learners back and ask the debrief questions below. Ask for at least two volunteers for each question.

### Debrief Questions

- What's something that stood out to you about this website?
- In what ways could this website be beneficial to you as a Case Manager?
- In what ways could this website be beneficial to a participant?

Thank you for sharing information about this website.

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### Knowledge Exchange

**Purpose:** Answer learner questions and encourage sharing among learners.

**Estimated Time:** 15 minutes

#### PPT 71

We now have time dedicated to share ideas, experiences, and expertise. You also can ask a trainer to show you a process in CWW or WWP, or pose other questions to us or each other. Take a look at the sentence starters on the screen. Choose a sentence starter to complete.

Let's hear from a few of you. **Ask** Who is ready to share what they chose?

**Note to Trainer:** Depending on the size of the group and the time left, you could ask each person to share. You also could ask if anyone chose the "A question I have" starter first, and move on from there. As people share, encourage others to comment, give a thumbs up if they have experienced the same thing, or ask follow-up questions.

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### Closure

**Purpose:** Identify learners' takeaways from the session.

**Estimated Time:** 5 minutes

#### PPT 72

Before you leave us today, please share your thoughts. Use your text annotation tool to add one thought about the value or impact of our discussion today and how it can help you in your work. After you've added your thought in the bubble, feel free to switch to your stamp annotation tool and put stamps next to others' thoughts that resonate with you.

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## Placement Determination Session

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☀ PPT 1

👉 TN Appendix A



### Note to Trainer:

- 15 minutes prior to the session, display the PPT (share sound). Greet learners as they arrive, and complete audio checks with them. Upload the notes handout. The TN Appendix contains text to paste into the chat for the notes handout and phone number if they don't have audio on their computer.
- At sessions start, click on the people with arrows icon, which is the Placement Determination session.
- Be sure to document who attended the session, and submit the Focused Discussion for New FEPs Class Information sheet to Reg Staff.

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## Welcome and Announcements/Updates

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**Purpose:** Share recent and upcoming news or information pertinent to learners.

**Estimated Time:** 5 minutes

☀ PPT 73 (Click the people with arrows icon from PPT 1)

**Turn on** webcams for the welcome.

We're glad you were able to find time in your schedule to join us today.

Before we dive in, we have a few updates to share with you.

*[Share any announcements or updates you identified for this session.]*

We also are highlighting two Learning Center resources you may want to check out: our Introduction to Motivational Interviewing course, which covers how to have a more collaborative conversation with participants, and a Desk Aid, Changing a W-2 Placement, which covers the steps you must take in this situation.

This month's topic is W-2 placements, target types, and two-parent policies regarding placements.

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## Topic of the Month: Placement Determination

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**Purpose:** Provide a refresher or additional instruction on everyday W-2 case management tasks.

**Estimated Time:** 20 minutes




The W-2 Manual Chapter 7 focuses on placement types and criteria used to determine which placement is the most appropriate for the individual. Use the policy guidance in



addition to what you know about the individual and their family situation when determining the appropriate placement. Each individual and family situation is unique.

### ☀ PPT 74

As situations change, you must re-assess to determine if the placement needs changing. Per policy, you must complete the Informal Assessment in WWP prior to making the initial placement and when making placement changes. This means completing a  new informal assessment, visiting each page, making necessary changes, and  submitting it. This ensures you select the most appropriate placement based on the participant's current barriers to employment and job readiness.

### ☀ PPT 75

Each placement within the W-2 program has its own requirements. Many of them are meant for  custodial parents and are the ones you use most often. Other placements are for  non-custodial or  minor teen parents. Those types of placements require a target type on the **W-2 Request** page in CWW.

In turn, the placements available in the dropdown on the **W-2 Placement** page depend on the options you chose on the  **W-2 Request** page. If you didn't select a  **Target Type** and individual, CWW assumes it is a Custodial Parent case, and gives you placement options associated with a custodial parent.

### ☀ PPT 76

Let's take this opportunity to match the placement options with the target type. Use your annotation tool to draw a line from the Placement to the target type associated with it. Not all placements require a target type.

**Allow** time for learners to annotate.  
Good work. Let's double check your answers.

*[clear annotations]*

### ☀ PPT 77

The CSJ, W-2 T, CMC, and CMF placements do not require a target type. CWW knows that you want to consider placements for a custodial parent when you leave this field blank.


 PPT 78

Both the ARP and CMP placements require a **Target Type** of PREGNANT WOMAN. If a woman is eligible for one of these placements, she cannot have custody of other children.



 PPT 79



Lastly, the CMM placement requires a **Target Type** of MINOR PARENT. Although this is an unpaid placement, it ensures minor teen parents can receive other services through the W-2 program.

 PPT 80

One thing we want you to walk away with is, use target types in instances where an individual won't meet the W-2 non-financial criteria for a custodial parent. If you  don't select a **Target Type**, a minor teen parent and households with no minor children will fail eligibility, causing you to go back and troubleshoot the failure. A good rule of thumb is to ask yourself, "Is this a Custodial Parent case?" If it is, then you won't need to select a **Target Type** and **Target Individual** on the **W-2 Request** page.

 PPT 81

Next, we'll dive deeper into certain placements. W-2 has several unpaid placements available to job ready or employed participants. The most common is the CMF/CMF+, or Case Management Follow-Up, placements, which are for participants who gain employment while in W-2. The difference between them is that the CMF+ has a  \$50 supplemental payment each month for 12 months. Participants in a CMF+  can count toward the WPR.

Participants in the CMF/CMF+ are eligible for case management  follow-up services for 12 months. During this time, you must provide appropriate services and  maintain contact, at a minimum, of once a month.

**Ask** What follow up services case management services does your agency provide?

**Note to Trainer:** Per policy, the follow up services can include job retention, literacy skills, and adult basic education, as well as GED and HSED activities. This also includes the vocational literacy skills and adult basic education and ESL activities.

That was a high overview of the CMF/CMF+ placements in W-2. Let's move on to two of the most common paid placements within the W-2 Program, CSJ and W-2 T.

## ☀ PPT 82

The CSJ, or Community Service Job, placement is appropriate for individuals who have little or no work history, no evidence of reliable work habits, or a work history with frequent job quits or terminations. They could have physical or mental conditions or other personal limitations to regular employment. Or they could be experiencing a domestic violence situation or temporary illness to themselves or a family member.

**Ask** Under what circumstances would a CSJ placement still be appropriate for a participant experiencing physical or mental conditions?

*Possible Answers: the severity of the conditions, how long they are expected to last, condition is ongoing, but manageable*

## ☀ PPT 83


The CSJ placement is unique in that it has three prorated placements: 1/3 CSJ or CS1, 1/2 CSJ or CS2, and 2/3 CSJ or CS3. These prorated placements are designed for participants who are working less than 30 hours a week, want to work more hours a week, and are unable to increase those hours due to limitations or barriers or the local labor market. Keep in mind, participants in prorated placements still have requirements to engage in other activities to earn the partial payment that goes along with each prorated placement.


Let's break down the CSJ prorated placements. For future reference, you also can find this information and a copy of the chart in the W-2 Manual 7.4.1.

You determine the appropriate CSJ placement based on the hours per week the participant is working in unsubsidized employment.

Participants working in unsubsidized employment 20 to 29 hours per week are eligible for the 1/3 CSJ placement. This means they are working 2/3 of the time and participating in activities 1/3 of the time. In this placement, participants continue to engage in up to 10 hours of work training and up to 10 hours of education and training activities per week.

Participants placed into 1/2 CSJ work in unsubsidized employment 15 to 19 hours per week, and continue to engage in 11 to 15 hours of work training and up to 10 hours of education and training activities per week.

Participants placed into 2/3 CSJ work in unsubsidized employment  10 to 14 hours per week, and continue to engage in 16 to 20 hours of work training and up to 10 hours of education and training activities per week.

If a participant is working  less than 10 hours per week, you would place them in a full CSJ.

Now let's give you an opportunity to choose the correct CSJ placement. When I read a scenario, use your stamp annotation tool to select the correct placement on the screen.

### PPT 84

Jada works one hour a day as a caregiver.

**Ask** What is the appropriate placement for her?

*Answer: CSJ*

*[clear annotations]*

Brenda is working 18 hours per week at a local grocery store as a cashier.

**Ask** What is the appropriate placement for her?

*Answer: CS2*

*[clear annotations]*

Elsa is working 25 hours per week as a CNA.

**Ask** What is the appropriate placement for her?

*Answer: CS1*

*[clear annotations]*

Monique is working 12 hours per week at a local day care center.

**Ask** What is the appropriate placement for her?



*Answer: CS3*


*[clear annotations]*

To summarize, determine the appropriate pro-rated placement based on the hours per week the participant is working. Then engage them in additional activities as needed. The goal is to engage participants in activities that will help them reach their employment goals and increase their likelihood of success.

As I mentioned earlier, there are two main placements that we use in W-2. We just covered the CSJ placement, and now we will dive into W-2 T.

 PPT 85

The W-2 T, or W-2 Transitions, placement has similar characteristics to the CSJ; however, the severity of the participant's barrier or barriers typically is  more severe and expected to last longer. This also could be a barrier that another family member has, requiring the participant to care for that individual. Remember, this placement  requires that the participant or their family member complete a formal assessment with a licensed professional. Within 30 days of placement, you must document the referral and scheduled date of the assessment in WWP. It may take longer for the provider to complete the actual assessment. During this time, you use the current information you have to complete the Employability Plan and assign activities. A good starting point is to ask the participant what their average week looks like, and go from there.

Keep in mind that participants in a W-2 T placement still can be  assigned up to 40 hours week of activities based on their abilities. A participant even can be marginally employed and in a W-2 T placement if they have long-term, severe barriers that prevent them from increasing the hours they are working.

Let's look at a few scenarios and decide what would be the most appropriate placement based on the information provided.

 PPT 86

Thomas is a single father with two teenage boys. He has worked at Menards in the lumber yard for 15 years driving a forklift. Last spring, he had a work-related injury and has not been able to go back to work since. Thomas had an operation on his back right after the incident, and still is in therapy. He states his therapist feels he is making improvements; however, he still has a long road to recovery, and his therapist does not advise he return to physical labor. Thomas agrees to a formal assessment.




- **Ask** What is the most appropriate placement for Thomas?
- *Answer: W-2 T, this is the best placement for Thomas, as he has barriers that would prevent him from returning to work at this time*

 PPT 87

Celia is a 19-year-old single mother with a 2-year-old daughter, Rebecca. Celia has some work experience, with customer service jobs she held while in high school. Celia indicates she sees a therapist every other week to help manage anxiety. She tells you she has always wanted to be a Dental Assistant. She completed high school and received her diploma. Celia states she was a good student and always made honor roll. *Answer CSJ, is the best placement for Celia; she presents no significant barriers at this time.*

 PPT 88

So far, we have covered the target types and common placements; now, let's talk about how this all fits together with a Two-Parent household. When working with a case that has two adults in the household, your first step is to determine if the household

 meets the two-parent definition in the W-2 Manual Chapter 14. If the household meets the two-parent definition, your next step is to  determine which parent to place. The ultimate goal is to increase both parents' earning capacity, but you must determine which parent is  best able to quickly increase the family's income by getting and keeping employment. Regardless of which parent you place, keep in mind that this person isn't always the primary person on the case. The placed parent and the primary parent are two separate things, and you would never change the primary person just so the check comes in the placed parent's name.

**Ask** How do you determine which parent is more employable?

*Possible answers: complete informal assessments, capacity to work full time hours, etc.*

Now it's your turn to look at a few scenarios with a two-parent household. Use the information provided to determine which parent you would place in W-2.

 PPT 89**Scenario #1**

Erica and Kyle are applying for W-2. Erica and Kyle have one child together. Legal parentage is established. Kyle has been out of work for a little over a month. Kyle worked in a local factory and is off work due to a non-work-related injury. He is hoping to go back to work in the next few weeks. He states he liked his job, but would like to do something else, as he doesn't think he can physically stand for extended periods of time. Erica has been out of the workforce since the birth of their child.

- **Ask** Who would you pick as the placed parent? *Kyle, he has most recent work history and will be off due to injury for only a short time.*

 PPT 90**Scenario #2**

Reid and Candy are married with two small children. Candy is applying for SSI. Reid has a medical condition that limits his ability to work full time. He currently is employed and working 4 hours per day at Goodwill Industries. He states he would really like to work more, and feels if he could get some training, he would be able to.

- **Ask** Who would you pick as the placed parent? *Reid. He is interested in working more with the right training and accommodations.*

 PPT 91**Scenario #3**

Maria and Marcus are married. They have a son, and Maria is two months pregnant. Marcus is a full-time student at UW-Madison. He is in his last semester to finish his degree. Maria has worked off and on in retail, but states she would like to find a different line of work that wouldn't require her to work nights or weekends. Maria states she needs to get her HSED and would like to go to college when Marcus has completed his degree.

- **Ask** Who would you pick as the placed parent? *Maria is able to look for work at this time. You would not be able to count Marcus' schooling because he is not attending an approved technical college. But, you could change him to the placed parent after he graduates.*

 PPT 92

Great work! Let me wrap up with a few key points about placement.

- Always complete an informal assessment prior to placement and at placement change. Use this information to make the best placement decision.
- When needing to place a non-custodial parent or minor parent, use a Target Type on the W-2 Request page.
- Not all households with two adults meet the criteria for a two-parent household.
- For two-parent households where both adults are included, determine which parent is most likely to increase the family's self-sufficiency the quickest.
- And, with two parents, the primary person on the case and placed person don't have to be the same person.

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**Energizer**

**Purpose:** Give learners a quick brain break.

**Estimated Time:** 5 minutes

 PPT 93

We have covered a lot of information so far! We are going to take a few moments to reenergize our brains by playing a quick round of Caption This!

As you can see, we have five different pictures on the screen. Come up with your best caption for at least one of the photos and type it in the chat. Be sure to include the photo number, so we know which photo you are captioning. Feel free to choose more than one photo to caption.

Next, we are going to visit a website that can be very useful when assisting participants who are looking for employment.

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**Website of the Month: Job Center of Wisconsin for FEPs**

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**Purpose:** Showcase an external resource that learners can use in case management.

**Estimated Time:** 10 minutes


☀ PPT 94

Today, we're focusing on using the Job Center of WI website from your perspective. When you are on the website, notice the box on the lower right, titled Labor Market Exploration. There are  two options to open: the Skill Explorer and the WisConomy.

☀ PPT 95

You can click on both of these and spend some time exploring. There is also a more... section. Clicking on this displays additional useful information.

☀ PPT 96


You also will notice various  icons on the bottom of the page. These are links to events, resources, education and training, as well as information on Unemployment, Veterans services, and Job Center locations.

☀ PPT 97

Next, it's your turn to spend some time exploring this website. Go ahead and search for information you might need, see how to navigate the areas of the site we identified, and note some benefits this site might have for you. We have put the link in the chat.

 You have five minutes.

**Note to Trainer:** Put the website link in the chat - <https://jobcenterofwisconsin.com/>.

 **Start** the 5-minute timer. After the timer ends, invite the learners back and ask the debrief questions below. Ask for at least two volunteers for each question.

**Debrief Questions**

- What's something that stood out to you about this website?
- In what ways could this website be beneficial to you as a Case Manager?
- How does it benefit participants if you use the features on this website?

Thank you for sharing information about this website.

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**Knowledge Exchange**

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**Purpose:** Answer learner questions and encourage sharing among learners.

**Estimated Time:** 15 minutes

 PPT 98

We now have time dedicated to share ideas, experiences, and expertise. You also can ask a trainer to show you a process in CWW or WWP or pose other questions to us or each other. Take a look at the sentence starters on the screen. Choose a sentence starter to complete.

Let's hear from a few of you. **Ask** Who is ready to share what they chose?

**Note to Trainer:** Depending on the size of the group and the time left, you could ask each person to share. You also could ask if anyone chose the "A question I have" starter first, and move on from there. As people share, encourage others to comment, give a thumbs up if they have experienced the same thing, or ask follow-up questions.

---

**Closure**

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**Purpose:** Identify learners' takeaways from the session.

**Estimated Time:** 5 minutes

 PPT 99

Before you leave us today, please share your thoughts. Use your text annotation tool to add one thought about the value or impact of our discussion today and how it can help you in your work. After you've added your thought in the bubble, feel free to switch to your stamp annotation tool and put stamps next to others' thoughts that resonate with you.

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## Education and Job Skills Training Policies Session

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☀ PPT 1

☞ TN Appendix A



### Note to Trainer:

- 15 minutes prior to the session, display the PPT (share sound). Greet learners as they arrive, and complete audio checks with them. Upload the notes handout. The TN Appendix contains text to paste into the chat for the notes handout and phone number if they don't have audio on their computer.
- 5 minutes prior to the session, click on the classroom icon, which is the Education and Job Skills Training session, to display annotation introduction slide. Copy the annotation directions from the TN Appendix and paste them into the chat.
- Be sure to document who attended the session, and submit the Focused Discussion for New FEPs Class Information sheet to Reg Staff.

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### Welcome and Announcements/Updates

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**Purpose:** Share recent and upcoming news or information pertinent to learners.

**Estimated Time:** 5 minutes

☀ PPT 100 (Click the classroom icon from PPT 1)

**Turn on** webcams for the welcome.

We're glad you were able to find time in your schedule to join us today.

Before we dive in, we have a few updates to share with you.

*[Share any announcements or updates you identified for this session.]*

We also are highlighting two Learning Center resources you may want to check out. Our Introduction to Collaboration CBT highlights the importance of collaboration within current systems, assisting customers in accessing all appropriate services, and how to develop customer centered case plans. In our Training on Demand videos, you'll find a video that shows you how to layer an Employability Plan to allow for upcoming changes and effectively serve participants. Be sure to check these out when you have time.

This month's topic is Education and Job Skills Training policies.

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### Topic of the Month: Education and Job Skills Training Policies

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**Purpose:** Provide a refresher or additional instruction on everyday W-2 case management tasks.

**Estimated Time:** 20 minutes

We know that increasing a participant's education level can lead to better opportunities for sustainable employment and open the doors for job advancement. W-2 has some very specific policies around education and training. You can find this information in the W-2 Manual in Chapter 8.

One of the most important tips I have for you is to make sure you are assigning the correct activity code for the education activity the participant is engaged in. This is very important for the Work Participation Rate, WPR, and ensures we are following policy.

Let's take a closer look at the policies for Education and Training.


### PPT 101

W-2 policy emphasizes that education and training is a pathway to meaningful employment. Education and training should be short-term and provide tangible employment skills. A best practice is to combine work or work training activities with education. You must complete both an educational needs assessment with participants who have not obtained a post-secondary degree or certificate, and a career assessment with all participants. Then, use that information when developing their Employability Plan. Quite often, education will be a part of their plan.



Remember, there is a limit to how many hours of education and training participants have assigned on their EP. For a participant in a CSJ placement, you may assign up to 10 hours per week. You can assign participants in a W-2 T placement up to 12 hours per week.

You may be wondering: What if a person is taking a CNA course or some other type of short-term certificate program that consists of more than 10-12 hours per week? Well, policy allows you to aggregate hours by combining those weekly hours into a larger amount. You can aggregate those 10 or 12 hours per week to enable a participant to engage in a short-term, intensive education or training program. Participants must be able to complete the program within a one-year period. In this instance, you can aggregate education hours up to 516 hours. These hours can be spent in classroom, doing lab work, or studying. You must include these hours on the Employability Plan. You can assign up to one hour of unsupervised study time for each hour of class time. As always, add PIN comments to justify your rationale for aggregating the education hours.


### PPT 102

Let's start with the general education activities that you can assign to participants. The following activities are those that are more common:  Adult Basic Education, General Education Development, or GED, High School Equivalency Diploma, or HSED, and Regular School. Literacy Skills and English as a Second Language, or ESL, also are included in the educational activities. Each of these activities has its own criteria, and you can find that information in the W-2 Manual Appendix, Activity Codes.


### PPT 103

Let's start with Adult Basic Education, or BE. Assign this to participants who need to brush up on  basic education such as reading and math. Participants engaged in this activity have their  diploma or GED/HSED but need to increase those basic education skills.


### PPT 104

General Education, or GE, is to prepare adults for the GED testing. Assign this when participants are  prepping for and taking their GED tests.

### PPT 105

High School Equivalency Diploma, or HE, is for participants who are going for their HSED. An HSED is similar to the GED, but  includes a few more tests, including civics and health.

### PPT 106



Regular School, or RS, is assigned to a participant who is  attending an education program that results in a high school diploma. Policy allows this to be the only activity code assigned to participants who are 18-19 years old, and placed in a CSJ placement.


Be sure to always check the definitions of the activity codes to ensure you are using the best option based on the participant's need and the actual activities they are completing.

Even if you aren't aggregating hours, you can include study time for the BE, GE, HE, and RS activities which you list under the same activity code.

**Ask** Which of these codes, BE, GE, HE, and RS, have you added to an EP for a participant? Add it in the chat.

 PPT 107

Another education and training activity is Job Skills Training, or JS. This is a  short-term training that is no less than 40 hours, but no more than 516 hours of classroom time. W-2 agencies can coordinate with their local technical colleges to offer certified training programs. The training  courses must be tied directly to occupations for which there are job openings in the community. Some employers also provide training that would fall under the JS activity, and some W-2 agencies have developed their own short-term training programs that meet the criteria for JS.

The short-term training must  provide skills to help the participant obtain employment or to advance or adapt to the changing demands of the workplace. Training may include customized skills training to meet the needs of a specific employer, or it can be general training that prepares an individual for a specific occupation within a particular employment sector.





If a participant is enrolled in an associate degree program at a state technical college and is in their last semester or has less than 516 hours to complete the degree, you would code it as JS on their employability plan.

**Ask** What short-term trainings are you aware of in your area? Where are they offered? You can unmute and shout out or type in the chat.

*Possible responses: basic welding, keyboard/data entry, CNA, medical assistant, utility installation, office software, food prep, electronic assembly, child care and hospitality*

Like the general education activities, JS also can have one hour of unsupervised study time for each hour of class time plus supervised study time. Include this in the hours assigned under the JS code, and add PIN comments to support the hours assigned.

 PPT 108

The last education and training activity we'll cover is Full-Time Technical College, or TC. This is the only education activity that has a  separate activity code to track time spent on studying. The code is TT. The key policy to keep in mind is that a TC activity  must be full time up to 15 hours per week, and must be at a Wisconsin Technical College. The  participant must maintain at least a 2.0 GPA, and must be employed or  engage in work activities for 25 hours per week in addition to class time. The 25 hours must include study time for the program as well as other work activities. The work activities can include work study, career planning, and work experience that relate to the training program.

**Note to Trainer:** Read scenarios and clear annotations between each scenario. Click to reveal the correct answer. Then click again to move onto the next scenario.

Now that we have covered the policies around education, let's give you an opportunity to choose a code. Use your annotation tools to mark on the screen the best activity code based on the scenario.

### PPT 109

#### **Scenario #1**

Angie works 15 hours per week as a dishwasher. During informal assessment, she shares she would like to get some training and be able to find a job in the medical field. You have her complete the career assessments, and this is a good fit for her. The local technical college offers a Medical Billing class that is 20 hours a week and will last 16 weeks.

**Ask** What activity code would you assign?

### PPT 110

*Answer: JS – this meets the criteria for a JS, as aggregating the hours will be less than 516 for her to complete the program. Her work and the training are less than 40 hours per week.*

### PPT 111

#### **Scenario #2**

Rodney graduated high school; however, he needs to brush up on his math skills to enter a Welding program at the local technical school.

**Ask** What activity code would you assign?

### PPT 112

*Answer: BE – he already has a diploma and needs to increase his math skills.*

**Follow-Up Question:** After Rodney gets his scores up and is enrolled and attending the Welding Program, what activity would you assign on his EP?

*Answer: JS*

### PPT 113

**Scenario #3**

Karla is 19-year-old who left school when she got pregnant. She was in the last semester of high school. She states she would really like to go back and finish her diploma. She can complete this at the local high school through their alternative program.

**Ask** What activity code would you assign?

☀ PPT 114

*Answer: RS*

☀ PPT 115

**Scenario #4**

Stella attends the local technical college enrolled full-time in Cosmetology, a 2-year program. She has a long-term goal of owning her own salon. She also is in work experience 10 hours a week at the local nursing home where she washes and sets residents' hair and does mini-mani/pedis. She has maintained a 4.0 GPA. She states that she spends 10 hours per week studying.

**Ask** What activity code would you assign?

☀ PPT 116

*Answer TC, TT, (bonus WE 10)*

☀ PPT 117

**Scenario #5**

LaTanya currently is working on her GED. She states that she now is interested in getting her HSED, as it is only a few more tests.

**Ask** What activity code would you assign?

☀ PPT 118

*Answer: HE*

☀ PPT 119

Remember, all the policies for Education and Training Activities are in found in Chapter 8 of the W-2 Manual. When someone is starting an education or training program it is common to create a layered EP to allow for varied start and end times. Be sure to look at our featured course Training on Demand video on Layering an Employability Plan for more information on how you would build that in WWP.

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**Energizer**

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**Purpose:** Give learners a quick brain break.

**Estimated Time:** 5 minutes

 PPT 120

We are going to step away from W-2 policy and give our brains a little break. There is a word search on the screen. Take a few moments to look it over, then type the first three words you see in the chat. **Give** learners up to three minutes.

 PPT 121

It is good to take a quick break and re-charge ourselves. We often need to give our brains a break from the world of W-2 and case management to re-focus and re-charge. This can be done in many ways; these brain teasers are just one example.

Next, we are going to spend a few minutes and visit a website that can be very useful when assisting participants who are looking for employment.

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**Website of the Month: Job Center of Wisconsin for Participants**


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**Purpose:** Showcase an external resource that learners can use in case management.

**Estimated Time:** 10 minutes

 PPT 122


Today we're focusing on using the Job Center web site from a participant's perspective.

When you access the website, you'll see the  section for Job Seekers. This section includes a list of current job openings, a tab to create or edit a resume, and a tab to search for employment. To create a resume, participants need to log in or start by creating a username and password.

 PPT 123


Clicking on More at the bottom will open more resources for job seekers. On the Searching for Jobs tab, you can use various search methods to find jobs by area, by skills match, and even by a military code.

 PPT 124


You also will notice various  icons on the bottom of the page. It has links to events, resources, education and training, as well as information on Unemployment, Veterans services, and Job Center locations.

 PPT 125

Next, it's your turn to spend some time exploring this website. Go ahead and search for information you might need, see how to navigate the areas of the site we identified, and note some benefits this site might have for participants. We have put the link in the chat.

 You have five minutes.

**Note to Trainer:** Put the website link in the chat - <https://jobcenterofwisconsin.com/>.

 **Start** the 5-minute timer. After the timer ends, invite the learners back and ask the debrief questions below. Ask for at least two volunteers for each question.

**Debrief Questions**

- What's something that stood out to you about this website?
- In what ways could this website be beneficial to a participant?
- How does it benefit you as a Case Manager if participants use the features on this website?

Thank you for sharing information about this website. Keep in mind logins do expire for this site.

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**Knowledge Exchange**

**Purpose:** Answer learner questions and encourage sharing among learners.

**Estimated Time:** 15 minutes

 PPT 126

We now have time dedicated to share ideas, experiences, and expertise. You also can ask a trainer to show you a process in CWW or WWP, or pose other questions to us or each other. Take a look at the sentence starters on the screen. Choose a sentence starter to complete.

Let's hear from a few of you. **Ask** Who is ready to share what they chose?

**Note to Trainer:** Depending on the size of the group and the time left, you could ask each person to share. You also could ask if anyone chose the "A question I have" starter first, and move on from there. As people share, encourage others to comment, give a thumbs up if they have experienced the same thing, or ask follow-up questions.

**Closure**

---

**Purpose:** Identify learners' takeaways from the session.

**Estimated Time:** 5 minutes

 PPT 127

Before you leave us today, please share your thoughts. Use your text annotation tool to add one thought about the value or impact of our discussion today and how it can help you in your work. After you've added your thought in the bubble, feel free to switch to your stamp annotation tool and put stamps next to others' thoughts that resonate with you.

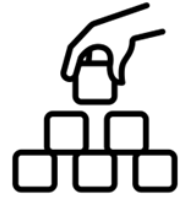
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## Work Participation Rate (WPR) Session

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☀ PPT 1

👉 TN Appendix A



### Note to Trainer:

- 15 minutes prior to the session, display the PPT (share sound). Greet learners as they arrive, and complete audio checks with them. Upload the notes handout. The TN Appendix contains text to paste into the chat for the notes handout and phone number if they don't have audio on their computer.
- 5 minutes prior to the session, click on the hand stacking blocks icon, which is the WPR session, to display annotation introduction slide. Copy the annotation directions from the TN Appendix and paste them into the chat.
- Be sure to document who attended the session, and submit the Focused Discussion for New FEPs Class Information sheet to Reg Staff.

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### Welcome and Announcements/Updates

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**Purpose:** Share recent and upcoming news or information pertinent to learners.

**Estimated Time:** 5 minutes

☀ PPT 128 (Click the hand stacking blocks icon from PPT 1)

**Turn on** webcams for the welcome.

Welcome! Thank you for joining us for this month's focused discussion.

Before we get going, we have a few updates to share with you.

*[Share any announcements or updates you identified for this session.]*

This month's topic is the Work Participation Rate, better known as WPR. Please take note of the policy references for this topic. Additionally, our featured course and spotlight resource both cover WPR. The W-2 Case Management: Attaining the Work Participation Rate course is part of the Reinforcing W-2 in the Classroom curriculum for new worker training. You must complete this course within 12 months of hire. **Ask** Who has watched this course already? Give us a thumbs up through reactions or in the chat.

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### Topic of the Month: WPR

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**Purpose:** Provide a refresher or additional instruction on everyday W-2 case management tasks.

**Estimated Time:** 20 minutes

The online course covers WPR for both the All Families and the Two-Parent rate requirements. We'll focus on concepts that will help with the All Families WPR today, starting with a brief review.

 PPT 129

Use your stamp annotation tool to mark your answer on the screen.


What determines the number of activity hours a participant must have in order to meet WPR?

- a) The age of the participant.
- b) The age of the youngest child in the family.**
- c) The participant's placement.
- d) The number of children in the family.

*[clear annotations]*

 PPT 130

The correct answer is b.

The federal requirements divide age of the youngest child into  three categories: under 12 months, 1-5 years, and 6-18 years.




 PPT 131




Activities are broken up into the following categories for WPR:

- a) Countable, Semi-Countable, Non-Countable
- b) Employment-related, Education-related, Family-related
- c) Core, Non-Core, Non-Countable**

*[clear annotations]*

 PPT 132


The correct answer is c. TANF regulations consider  job search and job readiness activities as core activities. To meet WPR,  both families with a youngest child aged 1-5 or 6-18, must participate in a  minimum of 20 core hours.


 Non-core activities are related to basic education and literacy skills. To meet WPR,  families with a youngest child aged 6 or older must participate in an  additional 10 hours of non-core activities or core activities.

Non-countable activities do not count toward WPR. Remember, all activities are available to assign, regardless of the WPR rules, and W-2 policy states that participants can participate in up to 40 hours per week if able. We didn't mention families with a youngest child under 12 months. The federal regulations do not have requirements for

activity hours for that age group. Again, W-2 policy still applies, and if a participant does participate in at least 20 hours of core activities, it helps the WPR.

### ☀ PPT 133


How do you know which W-2 activities fall under the core, non-core, and non-countable activities? One way is through the W-2 Manual.  After each activity description, it states how the activity counts for the Federal WPR requirements. In addition to knowing how many hours to assign, and knowing which codes fall under core, non-core, and non-countable; it's important to understand the definitions of each activity code.

 Another way to find this information is to use the handout from either the online course or Desk Aid we mentioned earlier. This handout also mentions best practices for meeting WPR, such as engaging families with a child under 12 months and assigning enough hours or core activities to meet WPR.

### ☀ PPT 134


As you know, it is appropriate to assign non-countable activities to participants. Some common, non-countable activities include those on the screen. Many activities that fall under these codes are similar to activities that count under core activity codes. Making some slight changes to an activity description might allow you to code the activity differently.

We're going to put the link to the W-2 Manual in the chat. You can find all the activity codes in the Appendix.




We'll start with  parenting skills. Review the activity description in the manual, if needed. Then, find a core activity code or codes that also might fit some of the activities defined for parenting skills. Put those activity codes in the chat.

**Note to Trainer:** Put the link to the W-2 Manual in the chat.

**Note to Trainer:** After a few people put some alternate codes in the chat, go over our answer below. Repeat the entire process for the remaining items, clicking the PPT when you start a new activity code.

- **Parenting Skills (PA)** – the Life Skills (LF) activity code mentions similar activities such as strengthening parenting skills, family nutrition, and understanding family relationships.
-  **Personal Development (PD)** – This one is a little trickier. It mentions motivational reading as an activity. If that reading is a workshop or activity topic covered under life skills or job readiness and motivation, you may be able to count it

as such. The PD activity code also mentions that healthier lifestyle activities that aren't deemed medically necessary belong here. However, if the activity is prescribed by a counselor, such a support group at the counseling agency, it could count under the Mental Health Counseling, CM, activity code.


-  **Child Care Related Activities (CC)** – This activity is specific for participants who need to find child care in order to participate in W-2. If participants are working on finding better care or developing a child care back up plan, it can count under Life Skills.
-  **Housing-Related Activities (HR)** – This is another code with a very specific purpose. When participants are in a housing crisis and need to find housing, use this activity. If a participant is looking for different housing for other reasons, it may fall under Life Skills.
-  **Ongoing Medical/Personal Care (MP)** – It is possible that this activity may fit under the Physical Rehabilitation, PR, code. If the activity meets the PR requirements, especially if is anticipated to last less than six months, use this code and not MP.


Now that we've identified some potential core activity codes that may be used instead of a non-countable code, there is one more thing to consider before making that change. The Federal TANF regulations also have documentation, verification, and supervision requirements for the activity types.


## PPT 135

Commonly, referred to as Doc/Ver/Sup, these requirements also can be found in the W-2 Manual Appendix. On the screen, you'll see definitions for all three of these terms. Use your draw annotation tool to draw lines matching the definition to the term.


*[clear annotations before moving on]*

 **Documentation** is the written record that substantiates or validates that the participation occurred. Most agencies use different versions of activity sheets or logs to gather documentation. Different activity codes have required information that must be on those forms.



 **Verification** is the requirements of how and when agencies need to obtain and maintain information about the participation. The documentation forms serve as written verification that participants completed the hours of assigned activities, and the verification requirements tell you if you must collect the documentation weekly, twice per month, or monthly, based on activity type.

 **Supervision** is provided by an individual who monitors the participant's daily attendance and can attest to the validity of the participation documentation submitted. Typically, the supervisor of the activity signs the documentation form.




### PPT 136

The Wisconsin Works Documentation, Verification and Supervision Criteria chart covers the requirements for each area based on the activity type. We're going to spend a little more time on  supervision. If you are thinking that a non-countable activity could fall under a core activity code, you must consider that the supervision requirements are different.


### PPT 137

Let's start with non-countable activities. These activities are  not required to have supervision while occurring. FEPs must have  monthly contact with the participant to discuss their progress while assigned any of these activities.



### PPT 138

Supervision for core activities varies. Participants in activities such as  LF and MO must be supervised whether this activity is completed in a  group setting or  independently. Supervisors could include W-2 agency staff, Job Center staff, workshop provider, and so on.



### PPT 139

Participants in the CM activity must be supervised by the provider agency, such as  counselors, medical provider or medical provider staff, or W-2 agency staff.

### PPT 140

For PR, supervision depends on whether participants complete the activity  on-site with the provider or on their own as  self-directed. When it is self-directed, you must have weekly contact with participants to discuss their progress. The same is true for self-directed employment search.

 PPT 141


For most core activities, you're required to collect the documentation  twice per month, as opposed to monthly for non-countable activities. However, when the activity becomes self-directed activities, such as ES and PR, require you to collect documentation  weekly.

**Ask** Earlier we talked about whether some non-countable activities could be coded under core activities. In addition to the activity description, what Doc/Ver/Sup requirements must you consider before assigning it under a core activity?

*Answer: If the activity will be supervised. If not, the activity must remain coded as a non-countable activity.*

 PPT 142

If participants are unable to obtain a supervisor's signature for an activity, you must assist them in verifying the information on their activity log. If you obtain verification by phone or email from the activity supervisor, you can note this on the activity log.

 We didn't cover the supervision requirements for all core activities or for non-core activities. Be sure to review the Doc/Ver/Sup chart regularly to ensure you are meeting the requirements listed in each column.

 PPT 143

Let's take everything we discussed about using appropriate activity codes and put it into practice. On the screen, you will see an activity that the FEP assigned under a non-countable activity code. Based on how the activity is written currently, determine if the code could fit under a core code. Use your stamp annotation tools to indicate yes or no.

**Scenario 1 (PD):** Read the book "Stretched Too Thin" to focus on feeling like a good mom, prioritize self-care, and establishing boundaries. (Location: Home)

*Answer: No.*

**Ask** What did you see in this description to help you decide this could not be changed?

- *Possible answers: motivational reading falls under PD; because she is just reading a book, there is no way to supervise the activity to meet core code requirements.*

*[clear annotations]*

 PPT 144

**Scenario 2 (PA):** Participate in Mother/Daughter CHOICES program by attending weekly meetings and completing suggested activities at home with your daughter. (Location: Middle School and Home)

*Answer: Yes.*

**Ask** What could make this activity fit under another code?

- *Possible answers: this could fall under life skills as strengthening parenting skills and understanding family relationships; weekly meetings are supervised by someone.*

**Ask** What would you change in this description to make it obvious that it falls under life skills?

- *Possible answers: be clear the meetings are facilitated by someone who fits supervisor definition, indicate that the activities are assignments as part of the program, further describe program in PIN Comments.*

*[clear annotations]*

## PPT 145

**Scenario 3 (MP):** Complete stretching and range of motion exercises as prescribed by your physical therapist for the next six months as part of the after-surgery short-term recovery plan. (Location: Home)

*Answer: Maybe.*

**Ask** What else might you need to know before making a decision?

- *Possible answers: is this the only thing the participant can work on, will the overall recovery last more than six months, will the physical therapist be following up with the participant.*

If the answers to these questions are yes, the FEP might be able to count it as physical rehabilitation. As of right now, it's anticipated to last six months or less, and we always work with the best information possible. And, if the activity will be supervised, it could count. Remember, the FEP also must check in weekly with the participant for self-directed physical rehabilitation.

*[clear annotations]*

## PPT 146

**Scenario 4 (PD):** Complete the self-paced, online Happiness at Work workshop. Workshop focuses on problem solving, motivation, and goal setting. (Location: Home)

*Answer: Yes.*

**Ask** What could make this activity fit under another code?

- *Possible answers: if the online program has a way to track time spent and work done, the FEP could serve as the supervisor; the job readiness/motivation activity code covers activities designed to prepare someone for work, including building self-esteem and goal setting.*

*[clear annotations]*

Thanks for thinking through these activity descriptions with us. **Ask** What questions do you have about assigning appropriate activities for WPR purposes?

### ☀ PPT 147

WPR is only one piece of the case management puzzle. The W-2 program offers a wide variety of activities to meet participants' needs as they prepare for work. There are times when it is necessary to engage in federally non-countable activities. Be sure to double check activity descriptions as well as Doc/Ver/Sup requirements when selecting the most appropriate activity code. Keep in mind, you can engage participants capable of participating in more hours each week to enough core and non-core course while still allowing for some time to engage in non-countable activities.

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### Energizer

**Purpose:** Give learners a quick brain break.

**Estimated Time:** 5 minutes

We are going to step away from WPR and give our brains a little break. You will see a riddle or brain teaser appear on the screen. When you think you know the answer, you can unmute and give a shout out or type the response in the chat.

### ☀ PPT 148

A cowboy rode into town on Friday, stayed three days, and rode out again on Friday. How did he do that?

☞ His horse's name is Friday

### ☀ PPT 149

What starts with a T, ends with a T, and has T in it?

☞ Teapot

### ☀ PPT 150

Who has hands, but can't clap?

☞ Clock

### ☀ PPT 151

Before Mount Everest was discovered, what was the highest mountain on Earth?

 Mount Everest, of course!

 PPT 152

If an electric train is traveling south, which way is the smoke going?

 There is no smoke; it's an electric train!


 PPT 153

I stand when I'm sitting, and jump when I'm walking. Who am I?

 Kangaroo

 PPT 154

What did one eye say to the other?

 Between us, something smells

 PPT 155

If you were running a race and you passed the person in 2<sup>nd</sup> place, what place would you be in now?

 Second place

Remember, it is always good to take a quick break and re-charge ourselves. We often need to give our brains a break from the world of W-2 and case management to re-focus and re-charge. This can be done in many ways; these brain teasers are just one example.

Next, we are going to spend a few minutes visiting a couple websites that offer online learning opportunities for participants.

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**Website of the Month: Online Learning**

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**Purpose:** Showcase an external resource that learners can use in case management.


**Estimated Time:** 10 minutes

 PPT 156

Today we're looking at two websites: Gale courses and GCFLearnFree.org. Both offer online learning opportunities on a variety of topics.


 PPT 157

First are Gale courses. Gale Courses offers a wide range of highly interactive, instructor led courses. Courses run for six weeks, and new sessions begin every month. Public libraries provide access to these courses. All you need is a library card, and you can take the classes for free.


After you find the Gale course section on your library's website,  click on a topic to open the course catalog. From here, you can find all the courses offered and information about what the courses entail.

 PPT 158


GCFLearnFree.org provides training topics on essential skills people need to live and work in the 21st century. From Microsoft Office and email, to reading, math, and more — GCFLearnFree.org offers more than 200 topics, including more than 2,000 lessons, more than 1,000 videos, and more than 50 interactives and games, completely free. On this site, the courses are self-paced.

From the home page, you can  click on Topics to see a list of common topics. Clicking on a topic will take you to that tutorial and provide a list of modules, as well as any other suggested tutorials to go along with the topic.

 PPT 159

Now, it's your turn to spend some time exploring these websites. Go ahead and search for information you might need, see how to navigate the sites, and note some benefits they might have for you and participants. We'll put two links in the chat. One will take you directly to GCFLearnFree, and the other will take you to a map of the Wisconsin Library System. From the map, you can click on your area to go to their website to find the Gale courses.  You have five minutes.

**Note to Trainer:** Put the website links in the chat. (GCFLearnFree – <https://edu.gcfglobal.org/en/> and Map of WI Public Library systems – <https://dpi.wi.gov/pld/directories/systems>)

 **Start** the 5-minute timer. After the timer ends, invite the learners back and ask the debrief questions below. Ask for at least two volunteers for each question. We recommend you discuss one website at a time.

### Debrief Questions

- What's something that stood out to you about this website?
- In what ways could this website be beneficial to you as a Case Manager?
- In what ways could this website be beneficial to a participant?

Thank you for sharing information about these sites.

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### Knowledge Exchange

**Purpose:** Answer learner questions and encourage sharing among learners.

**Estimated Time:** 15 minutes

#### PPT 160

We now have time dedicated to share ideas, experiences, and expertise. You also can ask a trainer to show you a process in CWW or WWP, or pose other questions to us or each other. Take a look at the sentence starters on the screen. Choose a sentence starter to complete.

Let's hear from a few of you. **Ask** Who is ready to share what they chose?

**Note to Trainer:** Depending on the size of the group and the time left, you could ask each person to share. You also could ask if anyone chose the "A question I have" starter first, and move on from there. As people share, encourage others to comment, give a thumbs up if they have experienced the same thing, or ask follow-up questions.

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### Closure

**Purpose:** Identify learners' takeaways from the session.

**Estimated Time:** 5 minutes

#### PPT 161

Before you leave us today, please share your thoughts. Use your text annotation tool to add one thought about the value or impact of our discussion today and how it can help you in your work. After you've added your thought in the bubble, feel free to switch to your stamp annotation tool and put stamps next to others' thoughts that resonate with you.

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## TN Appendix A – Information to Add to the Chat Box

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### *General Information*

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#### **Annotation Tools - Draw**

Access annotation tools under View Options - Annotate at the top of the screen. Choose the draw option.

#### **Annotation Tools - Stamp**

Access annotation tools under View Options - Annotate at the top of the screen. Choose the stamp option.

#### **Notes Handout**

Download a notes template if you don't have it already.  
[upload Focused Discussions Notes Handout]

#### **Phone Number**

If you don't have a mic/speakers, connect to the audio by calling 312-626-6799. Meeting ID 836 2229 8495.

#### **Renaming Instructions**

If your display name is not correct, rename yourself by clicking on the more button (...) next to your display name.

If you called in by phone, please rename your phone number to match your login name.

#### **Message for Learners Inappropriate for Focused Discussions**

We appreciate your interest in attending this session. However, the Focused Discussion series is designed for workers who have finished NWT in the past six months. If you have any questions or concerns, please contact your ATL.

#### **Late Arrival Message**

This Focused Discussions session is already in progress. PTT is unable to admit late arrivals. Please join us the second Tuesday of next month for the next session. If you have any questions, contact Dave Turk at david.turk@wisconsin.gov.

***DCF Forms Session***

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**Website of the Month**

<https://211wisconsin.communityos.org/>

***Alerts and Worker Tasks Session***

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**Alerts Table**

[https://wss.ccdet.uwosh.edu/Courseware/reviews/W2\\_Alerts\\_WorkerTasks/Alerts\\_Table.pdf](https://wss.ccdet.uwosh.edu/Courseware/reviews/W2_Alerts_WorkerTasks/Alerts_Table.pdf)

**Website of the Month**

<https://dcf.wisconsin.gov/childcare>

***Participation Tracking Session***

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**W-2 Manual**

<https://dcf.wisconsin.gov/manuals/w-2-manual/Production/default.htm>

**Website of the Month**

<https://www.dhs.wisconsin.gov/adrc/index.htm>

***Placement Determination Session***

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**Website of the Month**

<https://jobcenterofwisconsin.com/>

***Education and Job Skills Training Policies Session***

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**Website of the Month**

<https://jobcenterofwisconsin.com/>

***WPR Session***

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**W-2 Manual**

<https://dcf.wisconsin.gov/manuals/w-2-manual/Production/default.htm>

**Website of the Month**

GCFLearnFree - <https://edu.gcfglobal.org/en/>

Map of WI Public Library systems - <https://dpi.wi.gov/pld/directories/systems>