

# *Trainer's Guide*

## **W-2 New Worker Training Hub**

(8 sessions)

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### **Purpose**

Offer a forum for new workers that assists them through trouble spots, answers questions, points them to resources, and provides opportunities to connect with each other.

### **Session Topics**

- Desk Aids
  - Comments (Case vs. PIN) and Case Numbers/PINs
  - Matching Activities and Codes
  - Employment Page in CWW
  - Navigating the W-2 Manual
  - Income vs. Assets
  - Goal Setting
  - Participation Tracking
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**Table of Contents**

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

**DESK AIDS SESSION..... 5**

Icebreaker and Introductions ..... 5

Announcements and Updates..... 6

Stretch at Your Desk ..... 6

Topic of the Week: Desk Aids ..... 6

Open Q&A ..... 8

Closure ..... 9

**COMMENTS, CASE NUMBERS, AND PINS SESSION ..... 10**

Icebreaker and Introductions ..... 10

Announcements and Updates..... 10

Stretch at Your Desk ..... 11

Topic of the Week: Comments, Case Numbers, and PINs..... 11

Open Q&A ..... 14

Closure ..... 14

**MATCHING ACTIVITIES AND CODES SESSION ..... 15**

Icebreaker and Introductions ..... 15

Announcements and Updates..... 16

Stretch at Your Desk ..... 16

Topic of the Week: Matching Activities and Codes..... 16

Open Q&A ..... 18

Closure ..... 19

**EMPLOYMENT PAGE SESSION..... 20**

Icebreaker and Introductions ..... 20

Announcements and Updates..... 21

Stretch at Your Desk ..... 21

Topic of the Week: Employment Page..... 21

Open Q&A ..... 26

Closure ..... 26

**NAVIGATING THE W-2 MANUAL SESSION..... 27**

Icebreaker and Introductions ..... 27

Announcements and Updates..... 28

Stretch at Your Desk ..... 28

Topic of the Week: Navigating the W-2 Manual..... 28

Open Q&A ..... 31

Closure ..... 32

**INCOME VS. ASSETS SESSION..... 33**

Icebreaker and Introductions ..... 33

Announcements and Updates..... 34

Stretch at Your Desk ..... 34

Topic of the Week: Income vs. Assets..... 34

Open Q&A ..... 40

Closure ..... 40

**GOAL SETTING SESSION ..... 41**

Icebreaker and Introductions ..... 41

Announcements and Updates..... 42  
Stretch at Your Desk ..... 42  
Topic of the Week: Goal Setting ..... 42  
Open Q&A..... 47  
Closure ..... 47

**PARTICIPATION TRACKING SESSION..... 48**

Icebreaker and Introductions ..... 48  
Announcements and Updates..... 49  
Stretch at Your Desk ..... 49  
Topic of the Week: Participation Tracking ..... 49  
Open Q&A..... 54  
Closure ..... 54

**TN APPENDIX A – INFORMATION TO ADD TO THE CHAT BOX..... 55**

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**Materials**

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- Trainer's Guide
- PPT
- W-2 NWT Hub Notes Handout in electronic form
- NWT Hub Class Information Sheet (attendance tracking)
- Laptop
- Webcam
- Headset
- Link for the Zoom session (<https://us06web.zoom.us/j/85287627641>)
- Open case in the training environment and ability to log in to CWW and WWP for questions that come up
- Be prepared to access the W-2 Manual, Learning Center, CWW, and WWP

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**Suggested Pace**

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

9:00 – 9:15: Icebreaker and Introductions

9:15 – 9:20: Announcements/Updates from PTT

9:20 – 9:25: Stretch at Your Desk

9:25 – 9:40: Session Topic of the Week

9:40 – 9:55: Open Q&A (ensure you have at least 5 minutes left for Q&A if other sections take longer)

9:55 – 10:00: Closure

**Note to Trainer:**

- Prior to each session, gather any announcements or updates. This could include any PTT or system updates relevant to new workers.
- Double check which learners are currently in NWT prior to the session to know who may attend.
- Ensure the text boxes on the introduction slide for the topic (successes, challenges, questions) are cleared out. You must put the PPT in slide show mode to do this.

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**Desk Aids Session**

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☀ PPT 1 &amp; 2

☞ TN Appendix A

**Note to Trainer:**

- Rename yourself in Zoom to include (PTT) after your name.
- 15 minutes prior to the session, display the PPT. 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 piece of paper icon, which is the Desk Aid session, to display the 50 ways to take a break 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 NWT Hub Class Information sheet to Reg Staff.

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**Icebreaker and Introductions**

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**Purpose:** Build rapport between trainers/learners and learners/learners. Provide a space to share successes and challenges.

**Estimated Time:** 15 minutes

☀ PPT 3

**Turn on** trainer webcams. Welcome to our weekly W-2 New Worker Training Hub! Let's check in with each of you. When we say your name, please share the following with us (**encourage** learners to turn on webcams if available):

- Your Agency,
- Where you are at in your new worker training,
- A success from the last week,
- A challenge from the last week, and
- A burning question you have about new worker training or the W-2 program you want to discuss today.

**Note to Trainer:**

- While learners are sharing, track their answers on the PPT slide. The trainer not sharing the PPT can use the annotation tools to mark next to the agency and NWT section. The trainer sharing the PPT can type directly into the white boxes for successes, challenges, and questions.
- Use your discretion as to which questions you can answer quickly and which ones to address during the Q&A.

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**Announcements and Updates**

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**Purpose:** Share recent and upcoming news pertinent to learners (new workers in training).

**Estimated Time:** 5 minutes

☀ PPT 4

**Cover** any announcements or updates that are relevant to new workers.

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**Stretch at Your Desk**

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**Purpose:** Encourage practicing self-care with quick breaks.

**Estimated Time:** 5 minutes

**Note to Trainer:** Turn on your webcam for this piece and invite learners to do the same.

☀ PPT 5

Both NWT and ongoing case management take a lot of time, effort, and concentration. It's important to find ways for a quick break. Let's take a moment for a quick stretch at your desk with a seated crescent moon. This movement gives a deep stretch to your sides, lengthening your spine and allowing you to return to your work with better concentration.

☞ Start by lifting your arms over your head. Connect your palms and stretch your fingers wide. Gently lean to one side and hold for two-three breath cycles. Come back to the center and repeat on the other side. Come back to the center and lower your arms. Awesome!

When you need to take a moment to regroup and regain concentration, remember this stretch and incorporate it into your self-care.

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**Topic of the Week: Desk Aids**

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**Purpose:** Provide additional instruction in areas where learners (new workers in training) may struggle.

**Estimated Time:** 15 minutes

☀ PPT 6

This week's topic focuses on desk aids and other resources found in the Learning Center. Knowing where to locate resources in the Learning Center is a huge benefit to helping you in your daily role as a FEP. We've heard that workers forget about looking in the Learning Center after they're finished with NWT. Our advice to you is to check in

the Learning Center when you're struggling as there are several resources available to you. It can save you a lot of time and frustration when you're not sure how to do a task or want more information on a topic.

## PPT 7

Use the link on the Gateway page to access the  Learning Center for DCF.

**Note to Trainer:** Click the circled area on the PPT slide to go to the Learning Center website directly.

That brings you to the PTT Learning Center **Welcome Page**. From the Navigation Menu, click  Sign On/Off. After you sign in you will be able to access all of the resources in the Learning Center.

**Note to Trainer:** Trainer sharing will sign in. The rest of this section is meant to be a live walkthrough of the site. Complete the actions as you describe them.

After you sign in, you will see  **Hi [your name]! What would you like to learn today?** at the top of the screen. Below that, is a Search field. Either enter a key word or words you want to search for or  **click** in the field and **press** Enter to complete a blank search. Completing a blank search takes you to the **Learning Search** page and gives you a list of all trainings in the Learning Center. Note that this list includes trainings for other programs, not just W-2.

From this page, you can use the **Filters** menu to find additional resources, such as desk aids, reference guides, Training on Demand videos, and podcasts specific to W-2.

Using the  **Filters** menu, you can filter by duration, type, and subject.

Let's start by looking for desk aids and reference guides. In the  **Subject** section **check** W-2 Desk Aids/Reference Guides. This will bring up a list of desk aids and reference guides for W-2. Notice the  gray bar at the top of the list, showing our current filter. You can  hover over the options to see the full name of the material. As you  scroll down the page you will notice arrows to navigate to more resources.

**Note to Trainer:** Pick a desk aid to open and walk through.

When you open a desk aid, you see more information, including a  description and intended audience. **Click** the Launch button to open the resource. This opens the resource in the training window. You can make that window bigger by clicking the  Expand button. You can also  download or print the desk aid. If you want to view the

resource outside of the training window, choose the option to  access it in a new tab from underneath the window.

**Note to Trainer:** Click your internet browser Back button to go back to your filtered desk aid search.

**Ask** What is a topic you want me to search for? Unmute to share or type in the chat and we'll see if there is a desk aid or reference guide available for that topic.

**Note to Trainer:** Pick one of the suggestions and type it in the search field and **press** Enter.

Notice that our filter went away. To see only desk aids related to W-2 on this topic, we must go back and **re-select** the **Subject** filter of W-2 Desk Aids/Reference Guides.

Now, we can look at the resources for this topic.

**Note to Trainer:** Continue searching for and showing various desk aids for 3-4 topics. If needed, use the suggestions below.

*Possible topics: WWP, employment, assets, goals, eligibility, placement*

We mentioned other resources available in the Learning Center, including podcasts and Training on Demand videos. Clicking the Back button on our internet browser takes us back to our last search. To remove an existing filter you can click the  "x" in the gray filter bar at the top or  **uncheck** the box in the Filter menu. We also want to **remove** our topic from the Search Bar for now. To find only podcast or Training on Demand resources, start with the  **Type** filter and **select** Online Class. This changes the options in the  **Subject** section. Notice you can select Training on Demand videos specifically if that is what you are looking for. We're going to check W-2/TANF to give us a few more options.

**Ask** Based on the topics listed on our screen which ones would you like us to open to see the course description? (**Pick** 2-3).

Remember, when you type a topic in the Search bar, Learning Center displays all trainings associated with the topic. This includes not only the resources we just talked about, but also CBTs, webinars, and classroom training. Use the **Filter** menu to narrow down your results.

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## Open Q&A

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

**Estimated Time:** 15 minutes

 PPT 8**Note to Trainer:**

This section is a conversation to answer questions, reinforce best practices, and learn from each other. Based on questions/challenges, be prepared to share your screen and go into various systems to show processes, etc. Use webcams as appropriate.

- Start by answering questions about the topic of the week.
- Address burning questions and challenges from the introductions.
- Encourage other learners to share with each other for questions not related to policy and process.
  - Who else has experienced this? What did you do to help you move past this?  
Some of you already completed the \_\_\_\_\_ curriculum; what was a lesson learned for you?
  - Reinforce best practices you hear, etc.
- If time remains, solicit additional questions learners may have, or ask questions to invite sharing among learners.
  - What else can we show you today?
  - What is one of your go to resources during training?
  - What tip(s) do you have for people starting \_\_\_\_\_ curriculum?
  - What methods do you use to keep track of everything you are learning?

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**Closure**

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

**Estimated Time:** 5 minutes

 PPT 9

As we end our time together, please share your tip from today. **Invite** learners to choose one to share by unmuting or typing in the chat.

**What's Your TIP?**

T – takeaway from today

I – improvement I want to make

P – practice I plan to add

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## Comments, Case Numbers, and PINs Session

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☀ PPT 1 & 10

👉 TN Appendix A



### Note to Trainer:

- Rename yourself in Zoom to include (PTT) after your name.
- 15 minutes prior to the session, display the PPT. 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 conversation with the plus sign icon, which is the Comments session, to display the This or That 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 NWT Hub Class Information sheet to Reg Staff.

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### Icebreaker and Introductions

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**Purpose:** Build rapport between trainers/learners and learners/learners. Provide a space to share successes and challenges.

**Estimated Time:** 15 minutes

☀ PPT 11

**Turn on** trainer webcams. Welcome to our weekly W-2 New Worker Training Hub! Let's check in with each of you. When we say your name, please share the following with us (**encourage** learners to turn on webcams if available):

- Your Agency,
- Where you are at in your new worker training,
- A success from the last week,
- A challenge from the last week, and
- A burning question you have about new worker training or the W-2 program you want to discuss today.

### Note to Trainer:

- While learners are sharing, track their answers on the PPT slide. The trainer not sharing the PPT can use the annotation tools to mark next to the agency and NWT section. The trainer sharing the PPT can type directly into the white boxes for successes, challenges, and questions.
- Use your discretion as to which questions you can answer quickly and which ones to address during the Q&A.

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### Announcements and Updates

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**Purpose:** Share recent and upcoming news pertinent to learners (new workers in training).

**Estimated Time:** 5 minutes

 PPT 12

**Cover** any announcements or updates that are relevant to new workers.

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**Stretch at Your Desk**

**Purpose:** Encourage practicing self-care with quick breaks.

**Estimated Time:** 5 minutes

**Note to Trainer:** Turn on your webcam for this piece, and invite learners to do the same.

 PPT 13

Taking care of yourself at work is important. One way you can do that is with some desk stretches. Let's try chair pigeon, which helps us regain the balance we sometimes lose sitting in our desk chairs. Plus, it opens the hips and chest.

 Remain seated and place one leg over the other at a 90-degree angle. Flex the foot, remain upright, and keep your sit bones evenly distributed on the chair. You should feel a stretch in the outer, upper thigh. Hold this stretch for 5 breath cycles. Now, let's switch legs and do this on the other side. Again, we'll hold for five breath cycles. Way to go!

Remember to incorporate some stretches and movement throughout your day.

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**Topic of the Week: Comments, Case Numbers, and PINs**

**Purpose:** Provide additional instruction in areas where learners (new workers in training) may struggle.

**Estimated Time:** 15 minutes

 PPT 14

This week's topic focuses on comments, case numbers, and PINs. You can refer to section 4.3.3 in the W-2 Manual for more information about comments. Understanding who views and reads the comments you enter in CWW and in WWP can help you understand what's important to include in the comments. Remember, comments need to include anything regarding eligibility in CWW. This includes such things as who is in the group, what assets they have, and what verification items they provide. In WWP, we add more of a summary of case management information, including why you assigned certain activities and the outcome expected.

There needs to be a clear picture of the case and/or case management plan for anyone who has the need to read the comment. Often state and QA staff in your agency will review your comments. There also may be times when another worker in your agency will be meeting with a parent on your behalf, so having good comments will assist you and them in that situation.

## ⚙️ PPT 15

Comments are a  required part of your role as a FEP. When done correctly, they provide a  detailed history of the overall case and help you to recall a  parent's individual story. There are two types of comments for W-2: case comments and PIN comments.

## ⚙️ PPT 16

Enter PIN comments in  WWP. These comments focus on the individual parent, and include  assessment results, job readiness, participation tracking, and any other type of interaction or contact the parent has with the W-2 program.

Enter case comments in  CWW that center around a parent's case and program eligibility. You must enter case comments whenever anything impacting a parent's eligibility occurs. This includes  case reviews, changes in income or assets, and verification items.

Another way to differentiate between PIN and case comments is to think about the number you use in each system. In WWP, you look up parents by their individual PIN. In CWW, you use the case number to look at the overall case. You can distinguish a case number from a PIN by looking at the second digit. In case numbers, the second digit is always a one.

There are instances when you need to enter both case and PIN comments.

## ⚙️ PPT 17

Some examples include  placement, employment, household changes, and case closure. Even though you enter both case and PIN comments in these situations, the comments look a bit different. The case comment focuses on the whole case in terms of eligibility, household composition, and W-2 payments; whereas the PIN comment reflects the impact on the individual's participation in the program.

Let's look at a few examples.

 PPT 18

Use the draw annotation tool to draw a line from each comment about Erin's placement to the correct type of comment. **Give** learners about one minute to read the example comments and mark the slide, then **review** each comment type.

- *Answer: Top comment is the case comment. Bottom comment is the PIN comment.*
- **Ask:** What details in these comments helped you determine the right type of comment?

*[clear annotations]*

 PPT 19

Let's look at comments regarding Kevin's employment. Again, use your annotation tool to draw a line to the correct type of comment. **Give** learners about one minute to read the example comments and mark the slide, then **review** each comment type.

- *Answer: Top comment is the PIN comment. Bottom comment is the case comment.*
- **Ask:** What details in these comments helped you determine the right type of comment?

*[clear annotations]*

 PPT 20

Next, we have comments about Kelly's household changes. Household changes could not only impact program eligibility, but also an individual's ability to participate in activities. Go ahead and draw a line to the correct type of comment. **Give** learners about one minute to read the example comments and mark the slide, then **review** each comment type.

- *Answer: Top comment is the case comment. Bottom comment is the PIN comment.*
- **Ask:** What details in these comments helped you determine the right type of comment?

*[clear annotations]*

 PPT 21

Our last set of comments is about Jada's case closure. Use your annotation tool to draw a line to the correct type of comment. **Give** learners about one minute to read the example comments and mark the slide, then **review** each comment type.

- *Answer: Top comment is the case comment. Bottom comment is the PIN comment.*
- **Ask:** What details in these comments helped you determine the right type of comment?

*[clear annotations]*

Most of the comment types we just reviewed likely have other comments for the rest of the appointment, such as EP updates, verification items, and assessment information.

Be sure to select the appropriate comment type or types from the dropdowns when adding comments.

You must enter comments in CWW and WWP by the end of the next workday after you have any contact with a family or take action on their case. Remember, you can enter comments throughout the appointment.

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## Open Q&A

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

**Estimated Time:** 15 minutes

### PPT 22

#### **Note to Trainer:**

This section is a conversation to answer questions, reinforce best practices, and learn from each other. Based on questions/challenges, be prepared to share your screen and go into various systems to show processes, etc. Use webcams as appropriate.

- Start by answering questions about the topic of the week.
- Address burning questions and challenges from the introductions.
- Encourage other learners to share with each other for questions not related to policy and process.
  - Who else has experienced this? What did you do to help you move past this? Some of you already completed the \_\_\_\_\_ curriculum; what was a lesson learned for you?
  - Reinforce best practices you hear, etc.
- If time remains, solicit additional questions learners may have, or ask questions to invite sharing among learners.
  - What else can we show you today?
  - What is one of your go to resources during training?
  - What tip(s) do you have for people starting \_\_\_\_\_ curriculum?
  - What methods do you use to keep track of everything you are learning?

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## Closure

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

**Estimated Time:** 5 minutes

### PPT 23

Before we end our session, take a minute to write down your AHA Moment from today.

**Invite** a few learners to unmute and share their AHA Moment. **Encourage** others to type theirs in the chat.

- Apply – What information from today do you plan to apply moving forward?
- Happen – How do you plan to make this happen?
- Action – What is the first action step you plan to take?

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## Matching Activities and Codes Session

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☀ PPT 1 & 24

☞ TN Appendix A



### Note to Trainer:

- Rename yourself in Zoom to include (PTT) after your name.
- 15 minutes prior to the session, display the PPT. 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 person running icon, which is the Activities session, to display the ways to deal with stress 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 NWT Hub Class Information sheet to Reg Staff.

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## Icebreaker and Introductions

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**Purpose:** Build rapport between trainers/learners and learners/learners. Provide a space to share successes and challenges.

**Estimated Time:** 15 minutes

☀ PPT 25

**Turn on** trainer webcams. Welcome to our weekly W-2 New Worker Training Hub! Let's check in with each of you. When we say your name, please share the following with us (**encourage** learners to turn on webcams if available):

- Your Agency,
- Where you are at in your new worker training,
- A success from the last week,
- A challenge from the last week, and
- A burning question you have about new worker training or the W-2 program you want to discuss today.

### Note to Trainer:

- While learners are sharing, track their answers on the PPT slide. The trainer not sharing the PPT can use the annotation tools to mark next to the agency and NWT section. The trainer sharing the PPT can type directly into the white boxes for successes, challenges, and questions.
- Use your discretion as to which questions you can answer quickly and which ones to address during the Q&A.

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## Announcements and Updates

---

**Purpose:** Share recent and upcoming news pertinent to learners (new workers in training).

**Estimated Time:** 5 minutes

 PPT 26

**Cover** any announcements or updates that are relevant to new workers.

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## Stretch at Your Desk

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**Purpose:** Encourage practicing self-care with quick breaks.

**Estimated Time:** 5 minutes

**Note to Trainer:** Turn on your webcam for this piece, and invite learners to do the same.

 PPT 27

It's time for a quick stretch at your desk to help you practice self-care. Today's feature is the sit and stand chair stretch. This can help awaken your hamstring and glute muscles that become weakened over time from sitting in a desk chair.

 Begin seated with your feet flat on the floor and your knees at a 90-degree angle. Press down into your heels and use your legs and glutes to slowly stand up. Without shifting your hips from side to side, use your leg muscles to slowly sit back down. Let's do these two more times. Stand up...sit down...stand up...sit down. Great job!

A quick stretch is perfect when you are unable to take a longer break.

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## Topic of the Week: Matching Activities and Codes

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**Purpose:** Provide additional instruction in areas where learners (new workers in training) may struggle.

**Estimated Time:** 15 minutes

 PPT 28

This week we're talking about activities and the codes that go with them. You can find a list of all available activity codes and descriptions in the Appendix of the W-2 Manual.

Making sure you assign the appropriate activity code to the parent's activity description is critical when it comes to policy and monitoring. There are several activity codes that you can assign. You want to be sure to pick the best option that matches the assigned

activity. One way it was described to me that has stuck with me is, activity codes are very similar to bookkeeping codes, therefore the code we use is just as important as having accurate record keeping. The activity description is written for parents, so they know what it is they are doing.

**Ask** how many activity codes are there for custodial parents in W-2, not including up-front? Type your guesses in the chat. The answer is 43! This means you have a lot of flexibility when working with parents to choose activities.

## ☀ PPT 29-30

Use the **Add Activity** page in the Employability Plan driver flow to document activity assignment information.  We're focusing on the first two fields today.

 Use the **Activity Description** field to explain the assigned activity for the parent.

 In the **Activity** field,  select the appropriate activity code that matches the activity assigned. In most cases, the description of the activity would not be the same as the name of the activity code.

Let's practice matching some activities to codes. Feel free to use the W-2 Manual for help.

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

Access the W-2 Manual at <https://dcf.wisconsin.gov/manuals/w-2-manual/Production/default.htm>

## ☀ PPT 31

Use the stamp annotation tool to mark which code each of these activities could be counted under. **Give** learners about two minutes to mark the slide, then **review** each activity.

- **Weekly appointment with Job Developer, Gabe Michaels** – Most likely, this falls under the ES code, but it also could fall under MO if the Job Developer is helping the parent create a resume and practice for interviewing. **Ask** How could you rewrite this activity description to help parents know exactly what they will be doing and to help you know which code to use?
- **Job shadow various welders** – Career exploration and job shadowing activities are examples listed under the CE code.
- **Apply for first shift customer service jobs** – As you noted, this one clearly falls under ES. Remember to list independent job search and group job search as separate activities.
- **Create resume on Job Center of WI website** – Creating a resume is an activity associated with the MO code.

*[clear annotations]*

## ☀ PPT 32

Let's try another round. Use the stamp annotation tool to mark which code each of these activities could be counted under. **Give** learners about one minute to mark the slide, then **review** each activity.

- **Attend bi-weekly AA meetings** – Most support groups fall under the PD code. AA typically is led by a group member. If an AODA counselor led the group, then it could count under CA.
- **Attend time management workshop** – Time management is a basic life skill that can help a parent succeed in the workforce, making LF the correct code.
- **Read book: The Power of Positive Thinking** – Motivational reading counts as PD.
- **AODA group therapy and individual counseling** – This activity sounds like a professional provides the therapy and counseling. As I said earlier, that means the activity can count as CA.

*[clear annotations]*

## ☀ PPT 33

Final round. Use the stamp annotation tool to mark which code each of these activities could be counted under. **Give** learners about one minute to mark the slide, then **review** each activity.

- **Take the TABE test** – Standardized Educational Assessment Tools are part of CE.
- **Research requirements for the welding program at the technical college** – At this time, the assignment is to do some career research, not attend school. That makes this CE.
- **Attend GED prep sessions at the technical college** – Even though the assignment takes place at the tech college, use GE for parents working toward their GED.
- **Attend full time classes as part of the Office Assistant certificate** – This one is tricky. A certificate generally indicates a short-term program. If the entire program is no longer than 516 hours total, you can use the JS code. If the program requires one-two years to complete, it could be considered TC. Both codes have additional requirements that must be met before you can assign them.

Use the list of activity codes in the W-2 Manual to help you choose the correct code to go with the activities the parent and you agreed on. The manual explains each code and provides examples of activities. Remember to tie activities to parents' employment and other program goals to help them prepare for unsubsidized employment.

*[clear annotations]*

**Open Q&A**

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

**Estimated Time:** 15 minutes

### ☀ PPT 34

#### **Note to Trainer:**

This section is a conversation to answer questions, reinforce best practices, and learn from each other. Based on questions/challenges, be prepared to share your screen and go into various systems to show processes, etc. Use webcams as appropriate.

- Start by answering questions about the topic of the week.
- Address burning questions and challenges from the introductions.
- Encourage other learners to share with each other for questions not related to policy and process.
  - Who else has experienced this? What did you do to help you move past this? Some of you already completed the \_\_\_\_\_ curriculum; what was a lesson learned for you?
  - Reinforce best practices you hear, etc.
- If time remains, solicit additional questions learners may have, or ask questions to invite sharing among learners.
  - What else can we show you today?
  - What is one of your go to resources during training?
  - What tip(s) do you have for people starting \_\_\_\_\_ curriculum?
  - What methods do you use to keep track of everything you are learning?

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#### **Closure**

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

**Estimated Time:** 5 minutes

### ☀ PPT 35

We covered a lot of information today. Use the traffic light indicator to pick something you plan to do differently moving forward. **Ask for** volunteers to share, a couple examples for each color.

- Red – something they plan to stop doing
- Amber – something they want to improve or be more aware of moving forward
- Green – something new they want to start doing

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## Employment Page Session

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☀ PPT 1 & 36

👉 TN Appendix A



### Note to Trainer:

- Rename yourself in Zoom to include (PTT) after your name.
- 15 minutes prior to the session, display the PPT. 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 briefcase icon, which is the Employment Page session, to display the Things to Be Happy About 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 NWT Hub Class Information sheet to Reg Staff.

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### Icebreaker and Introductions

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**Purpose:** Build rapport between trainers/learners and learners/learners. Provide a space to share successes and challenges.

**Estimated Time:** 15 minutes

☀ PPT 37

**Turn on** trainer webcams. Welcome to our weekly W-2 New Worker Training Hub! Let's check in with each of you. When we say your name, please share the following with us (**encourage** learners to turn on webcams if available):

- Your Agency,
- Where you are at in your new worker training,
- A success from the last week,
- A challenge from the last week, and
- A burning question you have about new worker training or the W-2 program you want to discuss today.

### Note to Trainer:

- While learners are sharing, track their answers on the PPT slide. The trainer not sharing the PPT can use the annotation tools to mark next to the agency and NWT section. The trainer sharing the PPT can type directly into the white boxes for successes, challenges, and questions.
- Use your discretion as to which questions you can answer quickly and which ones to address during the Q&A.

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## Announcements and Updates

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**Purpose:** Share recent and upcoming news pertinent to learners (new workers in training).

**Estimated Time:** 5 minutes

☀ PPT 38

**Cover** any announcements or updates that are relevant to new workers.

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## Stretch at Your Desk

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**Purpose:** Encourage practicing self-care with quick breaks.

**Estimated Time:** 5 minutes

**Note to Trainer:** Turn on your webcam for this piece, and invite learners to do the same.

☀ PPT 39-40

We spend a lot of time on our computers during the workday. Working at a desk can build up tension in the fingers, hands, and wrists. Let's try some wrist and finger exercises that you can do throughout the day to increase the blood flow.

🖱️ Begin by extending your arms overhead. Using your wrists, draw five circles inwards, then five circles outwards with the wrists. Quickly spread your fingers and close your fists, releasing excess tension.

🖱️ Now, put your arms in front of you, with your palms facing upwards. Bring one hand sideways over the other and apply a downward pressure on each palm. You should feel a stretch in each wrist. Hold for five breaths. Bring your arms back out in front of you and turn the palms to face downward for a counter-stretch of the forearms. Hold for five breaths.

Now that we've stretched and got our blood flowing, let's tackle this week's topic.

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## Topic of the Week: Employment Page

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**Purpose:** Provide additional instruction in areas where learners (new workers in training) may struggle.

**Estimated Time:** 15 minutes

☀ PPT 41

Today, we're focusing on the Employment page in CWW. Remember, we add only current employment in CWW. You will enter all past and current employment in WWP to capture the work history of the parent.

Understanding how this page works makes entering employment a lot easier. When we enter employment in CWW we want to be sure that we're entering it correctly. Keep in mind that we want to build the employment pages to ensure that what the parent is paid each month is what CWW is actually budgeting. Often when a job starts or ends, a parent is not paid a full month's wages during that month. Other programs that use CWW for eligibility also need monthly earnings entered correctly to ensure that the correct FoodShare benefit is issued, or the co-pay for childcare and medical assistance is correct. The more you know how CWW works and budgets, the easier this page in CWW will be to complete.

## ☀ PPT 42

There are Training on Demand videos in the Learning Center that also can assist you in making entries on the **Employment** Page. Remember that you can view them as a refresher when needed.

## ☀ PPT 43

Let's walk through the **Employment** page with our own scenario. Tisha started a new job on 5/16. She is paid semi-monthly on the 1<sup>st</sup> and 16<sup>th</sup> of the month and will receive her first check on 6/1. She works 40 hours per week, making \$11.00 per hour.

**Note to Trainer:** When asking a bulleted question, remind learners to use their annotation tools to mark the field on the slide.

- **Ask** What is the first field we want to enter on this page? Use your annotation tools to circle or highlight the field.

*Answer: Begin Month*

*[clear annotations]*

Yes! The **Begin Month** is required, and we use it to tell CWW when to start counting income. **Ask** Based on this scenario, what **Begin Month** do we enter? Type in the chat or unmute and shout it out.

*Answer: June*

Although Tisha starts the job in May,  she will not have any actual income from the job until June. Think about when the parent will have actual money in their hand; that is the month we want CWW to start counting.

Next, we enter the  **Employer Information**,  **Employment Description**, and  **Strike Information** sections. Ask What questions do you have about those sections?

Let's move down to the **Detailed Wage Information** section.

#### PPT 44

- **Ask** Where do we tell CWW that Tisha is paid semi-monthly?  
*Answer: Pay Frequency field*

*[clear annotations]*

Correct! Use the dropdown in the **Pay Frequency** field to indicate how often a parent is paid within a typical month.  For Tisha, we select semi-monthly.

- **Ask** Now that we entered her pay frequency, where do we tell CWW how to figure out how much she gets paid with each check?  
*Answer: Average Hours Per Pay Period and Rate Per Hour fields*

*[clear annotations]*

You got it! Enter her  **Rate Per Hour** of \$11.00, then determine how many hours she works per pay period, not per week. Because Tisha is paid semi-monthly, we must multiply her weekly hours by 2.15.  This equals 86 hours. Finish completing this section by completing the  **Wage Type** and **Verification** fields, then  click Add to move the information into the dynalist.

- **Ask** How do you get CWW to populate the **Monthly Converted Amount** field in the **Totals and Comments** section?

 *Answer: Calculate button*

*[clear annotations]*

#### PPT 45

Clicking the Calculate button allows CWW to budget the parent's typical monthly income based on what you entered in the **Detailed Wage** section and the rules for calculating income. CWW continues to use the amount in the **Monthly Converted Amount** field for this month and all future months unless you tell it otherwise.

- **Ask** Imagine this parent would receive only one check in June. What field would you use to tell CWW to consider a different income amount for this month?

 *Answer: Override Converted Amount*

*[clear annotations]*

The **Monthly Converted Amount**, **Override Converted Amount**, and **Comment** fields are the only fields you need to be concerned about in the **Totals and Comments** section for the W-2 program. If the parent will not receive a full month's pay in the first month, calculate how much income they will receive, and  enter it in the **Override Converted Amount** field. Be sure to add comments about why you entered the override and how you calculated it. Based on our scenario,  we will not need to enter an override amount,  but we would need to add a comment.

If you do enter an override, CWW will use that override amount for the current month and all future months unless you tell it otherwise.

- **Ask** What field do you use to tell CWW that you want to calculate different income for the next month?

 *Answer: Enter New Begin Month*

*[clear annotations]*

That's right! Entering the next month in the **Enter New Begin Month** field and clicking Go creates a new month where you can update the **Override Converted Amount**.

## PPT 46

Sometimes, you need to indicate the parent will not be earning income for this month or future months. Do this by  entering zeroes in the **Override Converted Amount** field and an appropriate verification in the corresponding **Verification** field. We call this \$0 income.

 Other times, you want to remove the **Override Converted Amount** to tell CWW to count the full monthly income listed in the **Monthly Converted Amount** field. Do this by  spacing through the **Override Converted Amount** field to remove the amount listed.  Additionally, select the blank space from the Verification dropdown to remove the verification type. Remember, we wouldn't add zeros to get rid of an override, because adding zeros tells CWW to budget no income.

**Ask** Before we practice determining if you need to create multiple months with overrides, what other questions do you have about the **Employment** page?

Thinking about how many months you need based on the parent's first paycheck date and pay frequency helps determine if you need to add additional months beyond the month listed in the **Begin Month** field at the top of the page. Let's practice figuring out how many months. I'll give you a scenario; then use your annotation tools to mark how many months you need to create.

### ☀ PPT 47

**Scenario:** Patrice started her job on 3/1. She is paid bi-weekly and will receive her first check on 3/15.

*Answer: 1 - March*

*[clear annotations]*

### ☀ PPT 48

**Scenario:** Autumn started her job on 10/15. She is paid bi-weekly and will receive her first check on 10/29.

*Answer: 2 – October (partial) and November (full)*

*[clear annotations]*

### ☀ PPT 49

**Scenario:** Jamal started his job on 6/25. He is paid weekly and will receive his first check on 7/2.

*Answer: 1 - July*

*[clear annotations]*

### ☀ PPT 50

**Scenario:** Tori started her job on 8/25. She is paid monthly on the 1<sup>st</sup> of the month. She will receive a check for her first week of work on 9/1.

*Answer: 2 – September (partial) and October (full)*

*[clear annotations]*

Great job! Today we focused on entering a new job, but you take many of these same steps when a job ends or if a parent will not be earning any income for a period of time, but will return to the job. Be sure to check out the remaining Training on Demand videos to see how to enter these situations on the **Employment** page. The more you see how CWW thinks, the easier your entries become.

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**Open Q&A**

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

**Estimated Time:** 15 minutes

 PPT 51**Note to Trainer:**

This section is a conversation to answer questions, reinforce best practices, and learn from each other. Based on questions/challenges, be prepared to share your screen and go into various systems to show processes, etc. Use webcams as appropriate.

- Start by answering questions about the topic of the week.
- Address burning questions and challenges from the introductions.
- Encourage other learners to share with each other for questions not related to policy and process.
  - Who else has experienced this? What did you do to help you move past this? Some of you already completed the \_\_\_\_\_ curriculum; what was a lesson learned for you?
  - Reinforce best practices you hear, etc.
- If time remains, solicit additional questions learners may have, or ask questions to invite sharing among learners.
  - What else can we show you today?
  - What is one of your go to resources during training?
  - What tip(s) do you have for people starting \_\_\_\_\_ curriculum?
  - What methods do you use to keep track of everything you are learning?

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**Closure**

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

**Estimated Time:** 5 minutes

 PPT 52

Think about everything we discussed today – your successes, challenges, questions, and the employment page. Then, choose one of the questions on the screen to answer.

**Ask for** volunteers to share, covering all questions if possible.

- What do you know today that you did not know yesterday, and that will help you tomorrow?
- What will you do differently as a result of what you learned?
- What is a takeaway you plan to share with others you work with?

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## Navigating the W-2 Manual Session

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☀ PPT 1 & 53

👉 TN Appendix A



### Note to Trainer:

- Rename yourself in Zoom to include (PTT) after your name.
- 15 minutes prior to the session, display the PPT. 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 book icon, which is the Navigating the W-2 Manual session, to display the One Word 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 NWT Hub Class Information sheet to Reg Staff.

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### Icebreaker and Introductions

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**Purpose:** Build rapport between trainers/learners and learners/learners. Provide a space to share successes and challenges.

**Estimated Time:** 15 minutes

☀ PPT 54

**Turn on** trainer webcams. Welcome to our weekly W-2 New Worker Training Hub! Let's check in with each of you. When we say your name, please share the following with us (**encourage** learners to turn on webcams if available):

- Your Agency,
- Where you are at in your new worker training,
- A success from the last week,
- A challenge from the last week, and
- A burning question you have about new worker training or the W-2 program you want to discuss today.

### Note to Trainer:

- While learners are sharing, track their answers on the PPT slide. The trainer not sharing the PPT can use the annotation tools to mark next to the agency and NWT section. The trainer sharing the PPT can type directly into the white boxes for successes, challenges, and questions.
- Use your discretion as to which questions you can answer quickly and which ones to address during the Q&A.

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## Announcements and Updates

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**Purpose:** Share recent and upcoming news pertinent to learners (new workers in training).

**Estimated Time:** 5 minutes

### PPT 55

**Cover** any announcements or updates that are relevant to new workers.

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## Stretch at Your Desk

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**Purpose:** Encourage practicing self-care with quick breaks.

**Estimated Time:** 5 minutes

**Note to Trainer:** Turn on your webcam for this piece, and invite learners to do the same.

### PPT 56

It's time for a quick stretch at our desks. This is a way for you to take a quick break when needed. The upward dog stretch helps open your chest and lengthen your spine, which improves posture.

 Stand up and place your hands shoulder-width apart on a sturdy surface. Walk your feet backward so your chest is diagonal with the floor. Keeping your arms straight, lean your hips toward the desk, and open your chest as you do so. Keep your legs engaged to prevent your lower back from sinking. Hold this stretch for the next five breaths. To release, keep your core engaged and exhale as you fold at the hips, creating a 90-degree angle.

This job involves a lot of sitting and doing quick stretches throughout the day improves your circulation and energy.

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## Topic of the Week: Navigating the W-2 Manual

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**Purpose:** Provide additional instruction in areas where learners (new workers in training) may struggle.

**Estimated Time:** 15 minutes

### PPT 57

Today we will be discussing how to navigate the W-2 Manual. The W-2 Manual is your reference guide to the policies and procedures used to determine eligibility, provide case management services, and issue payments. Knowing how to search for and find

policy in the W-2 Manual is key to ensuring that you are following W-2 policy and processes when you are working with families receiving assistance. While you don't need to memorize policy and process, it's very important that you know how to locate the information in the manual. You'll find yourself accessing the W-2 Manual frequently in your day to day job.

We'll start by covering some basic navigation on the webpage. **Click** the link to the manual from the policy references on the PPT.

**Note to Trainer:** The rest of this section is meant to be a live walkthrough of the site. Complete the actions as you describe them.

Every time you access the manual, you land on the **Home** page, which highlights the  **Contents** tab on the orange navigation bar in the top left. Next is the  **Index** tab. This lists all the topics covered in the W-2 Manual in alphabetical order. Use the  **Glossary** tab to look up definitions of the terms we use in the W-2 program by **scrolling** through the list.

 **Click** the magnifying glass on the blue banner in the top right to open the keyword search box. **Type** a keyword or words you want to find in the manual in the box and **press** Enter on your keyboard to search. For instance, if we **type** in the words FORMAL ASSESSMENT, the manual displays links to all the pages in the manual that contain those words. It displays up to 20 pages in the list. If more than 20 pages contains that topic, **scroll** down and **click** the  Next Page button.

**Click** on any topic in the list to go to the page that covers that topic. When you **click** on the link to go to a page, the word, or words, you searched for are highlighted.

**Ask** Who has a term we can look up? Shout it out or type it in the chat.

**Note to Trainer:** Try to get 2-3 terms to look up. Otherwise, use these suggested terms: barrier, included adult, vehicle.

**Note to Trainer:** You may want to demonstrate a few more searches by searching for items mentioned as challenges by learners during introductions. If there were none, ask for suggestions, or pick 1-2 of the following: At Risk Pregnancy, BI Pull Down, Custodial Parent, Placements, Dependent Child, Reasonable Accommodation.

Let's go back to the  **Contents** tab, which lists the chapters of the W-2 Manual in order. You'll notice  chapter one is 01 Wisconsin Works (W-2) Introduction. In this chapter, you'll find information on the Basic Assumptions, the rolls performed by the W-2 Agency, a section covering reasonable accommodations, the application process, and eligibility reviews.

**Note to Trainer:** **Click** on 1.2.3 Financial and Employment Planner to open that page.

Chapter 1.2.3 covers policy regarding the role of the FEP in a W-2 agency. When you see  words in green, you can **click** on them to see the full wording of the acronym.  **Clicking** on words in red gives you a definition of that term. Each section of the manual also provides cross references to other chapters, as indicated by the  blue links.

The manual continues to list things in the same order as the application process, moving onto non-financial eligibility and then to financial eligibility policy. Be sure to check out  Chapter 4.1.2 for a nice list of what can be used for eligibility verification items as well as the ECF code associated with the verification item.

The  Appendix also contains a lot of useful information, including the Activity Codes and definitions, WPR information, Bureau of Refugee Programs, and the W-2 / DVR Technical Assistance Guide, or TAG for short.

## PPT 58

Now that we have spent a little time in the W-2 Manual, we want to give you an opportunity to use it by going on a scavenger hunt.  You will have five minutes to locate the chapter in the manual associated with the topics listed on the screen. Go ahead and jot the answers down on some scrap paper, and we'll come back together and share what we have found. Feel free to reach out to each other or us if you are struggling to find something. We will put the link to the manual in the chat.

Access the W-2 Manual at <https://dcf.wisconsin.gov/manuals/w-2-manual/Production/default.htm>

When you have found all the answers, put your favorite season in the chat. Your five minutes starts now.

**Note to Trainer:** After everyone has found the answers, or five minutes have passed, whichever is sooner, go through the answers one by one by asking learners to shout out the chapter. If time allows, feel free to add any comments about the policy.

- *Reasonable Accommodations – 1.3*
- *Working with Confidential Cases – 4.5*
- *CMC Placement Payment Amount – 10.1 (7.4.5.2 is also an option)*
- *W-2 Supportive Service Plans – 9.2.1 (9.2.3 is also an option)*
- *Aggregating Education Hours – 8.3.2*
- *Two-Parent Household 2<sup>nd</sup> Parent Requirements – 14.3*
- *Pro-Rated CSJ Placement hours – 7.4.1.4*
- *Job Access Loans – 17*
- *Activity Codes – Appendix*

- *Fact Finding 12.2, 12.3, and 12.4 have the different levels of the FF process*
- *Storing Information – 4.4*
- *Reporting Changes – 2.8*
- *W-2 Time Limits – 2.10*
- *Career Assessment – 5.4*

Well done everyone! We don't expect you to memorize the information in the W-2 Manual, but knowing how to find the information is critical in your day-to-day work. Be sure to add the link to your favorites, or an icon to your desktop, if you haven't done so already. We do not advise printing out the manual, as you want to be sure you are accessing the most current information, and the manual is updated as policy changes

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**Open Q&A**

**Purpose:** Answer learner questions and encourage sharing among learners.  
**Estimated Time:** 15 minutes

 PPT 59**Note to Trainer:**

This section is a conversation to answer questions, reinforce best practices, and learn from each other. Based on questions/challenges, be prepared to share your screen and go into various systems to show processes, etc. Use webcams as appropriate.

- Start by answering questions about the topic of the week.
- Address burning questions and challenges from the introductions.
- Encourage other learners to share with each other for questions not related to policy and process.
  - Who else has experienced this? What did you do to help you move past this?  
Some of you already completed the \_\_\_\_\_ curriculum; what was a lesson learned for you?
  - Reinforce best practices you hear, etc.
- If time remains, solicit additional questions learners may have, or ask questions to invite sharing among learners.
  - What else can we show you today?
  - What is one of your go to resources during training?
  - What tip(s) do you have for people starting \_\_\_\_\_ curriculum?
  - What methods do you use to keep track of everything you are learning?

**Closure**

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

**Estimated Time:** 5 minutes

☀ PPT 60

As we end our time together, please share your tip from today. **Invite** learners to choose one to share by unmuting or typing in the chat.

**What's Your TIP?**

T – takeaway from today

I – improvement I want to make

P – a practice I plan to add

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## Income vs. Assets Session

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☀ PPT 1 & 61

👉 TN Appendix A



### Note to Trainer:

- Rename yourself in Zoom to include (PTT) after your name.
- 15 minutes prior to the session, display the PPT. 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 money sign icon, which is the Income vs. Assets session, to display the A to Zen 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 NWT Hub Class Information sheet to Reg Staff.

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## Icebreaker and Introductions

---

**Purpose:** Build rapport between trainers/learners and learners/learners. Provide a space to share successes and challenges.

**Estimated Time:** 15 minutes

☀ PPT 62

**Turn on** trainer webcams. Welcome to our weekly W-2 New Worker Training Hub! Let's check in with each of you. When we say your name, please share the following with us (**encourage** learners to turn on webcams if available):

- Your Agency,
- Where you are at in your new worker training,
- A success from the last week,
- A challenge from the last week, and
- A burning question you have about new worker training or the W-2 program you want to discuss today.

### Note to Trainer:

- While learners are sharing, track their answers on the PPT slide. The trainer not sharing the PPT can use the annotation tools to mark next to the agency and NWT section. The trainer sharing the PPT can type directly into the white boxes for successes, challenges, and questions.
- Use your discretion as to which questions you can answer quickly and which ones to address during the Q&A.

---

## Announcements and Updates

---

**Purpose:** Share recent and upcoming news pertinent to learners (new workers in training).

**Estimated Time:** 5 minutes

☀ PPT 63

**Cover** any announcements or updates that are relevant to new workers.

---

## Stretch at Your Desk

---

**Purpose:** Encourage practicing self-care with quick breaks.

**Estimated Time:** 5 minutes

**Note to Trainer:** Turn on your webcam for this piece, and invite learners to do the same.

☀ PPT 64

Let's take a few minutes to stretch our arms. In our jobs we spend a lot of time at our computers. The eagle arms stretch helps prevent carpal tunnel syndrome and strengthens triceps, back, and shoulder muscles.

🖱️ Sit up straight and place your arms at a 90-degree angle in front of you. Cross one arm over the other, interlocking them. If you're able, bring your palms together. Lift your elbows and stretch your fingers upwards. Take three deep breaths. Switch sides. Hold for three deep breaths.

Taking a moment for this simple stretch can help save your hands throughout the day. As you know, we do a lot of typing!

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## Topic of the Week: Income vs. Assets

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**Purpose:** Provide additional instruction in areas where learners (new workers in training) may struggle.

**Estimated Time:** 15 minutes

☀ PPT 65

This week, we're talking about income and assets. The income and asset policy is found in Chapter 3 of the W-2 Manual, and there is a handy Desk Aid in the learning center that covers Income and Assets. Both are a great resource for you.

What is income? Does a certain income count or not? The same questions come up regarding assets. Why does it matter which is which or who earns or owns it? Well, the simple answer to that question is how it impacts eligibility. It is key in ensuring that eligibility is done accurately and according to policy. Making the entries in CWW regarding both income and assets can cause a case to fail if not entered correctly

I have a quick tip for you that always helped me put it into perspective. An asset is what you already have, money or property. Income is money you have coming in, earned or unearned, such as unemployment or payment for a service you provide.

## ☀ PPT 66

With that in mind, I'm going to mention something that is either considered income or an asset. Use your stamp annotation tools to mark which one you think it is. Right now, we are focusing only on whether something is income or an asset, not if it is counted for W-2.

The first one is  employment, including earnings from a minor. Mark if you think that is an income or an asset (*income*).

**Note to Trainer:** Continue going down the list until you have covered them all, clearing the annotations after each one. Prompt learners as needed about an asset being something you already have and income being money you are getting. Autos, boats, and campers are considered vehicles under the asset policy.

-  Child support (*income*)
-  Checking account (*asset*)
-  Unemployment (*income*)
-  Savings account (*asset*)
-  Autos (*asset*)
-  Boats (*asset*)
-  SSI/SSDI payments (*income*)
-  Self-Employment (*income*)
-  Tax returns (*income*)
-  Camper (*asset*)
-  Property such as a house or land (*asset*)
-  JAL and W-2 payments (*income*)

You got it! Remember, this list does not include all income and asset types. Did you know that CWW can help you figure this out as well?

### ☀ PPT 67

In CWW, there are two **Gatepost** pages that list types of income. First is the **Employment Gatepost** page, which asks about current employment, self-employment, receiving goods and services for work, and money for room or meals. Second is the **Unearned Income Gatepost** page. Anything you see listed here also is considered income, or money that the parent may have coming in.

### ☀ PPT 68

CWW also has an **Asset Gatepost** page. The list of potential assets is extensive, starting with a list of liquid assets. Then, the page goes on to ask about vehicle and other assets.

### ☀ PPT 69

In addition to knowing what items are considered an income or an asset, it is important to know if that income or asset is counted for W-2 financial eligibility. Look at the list of incomes we created earlier. Use your stamp annotation tools to indicate if the income listed would be counted or disregarded for W-2.

#### **Counted Income**

*Employment*

*Unemployment*

*Adult SSI/SSDI*

*Self Employment*

*Non-Regular CS (Arrears)*

#### **Disregarded Income**

*Income/earnings from a minor*

*Child Support*

*Child's SSI/SSDI*

*Tax returns*

*JAL and W-2 payments*

*[clear annotations]*

### ☀ PPT 70

When it comes to counted income in W-2, a good rule of thumb is to look at who receives the income. If it is an adult in the W-2 group, the income counts. If it is a child, the income is disregarded unless it is non-regular child support.

 PPT 71

Let's do the same for assets. Use your stamp annotation tools to indicate if the asset listed would be counted or disregarded for W-2.

**Counted Asset***Checking**Savings**Autos**Boat**Camper**Property***Disregarded Asset***\$10,000 combined vehicles**House they live in (Homestead), if valued at no more than 200% of the statewide median value for homes*

*[clear annotations]*

 PPT 72

Assets can be tricky. First and foremost, the asset must be available to the parent in order to be counted. When it comes to vehicles, most motorized ones are counted, meaning if a boat or camper was not motorized, it would not count toward the W-2 asset limit. Plus, we disregard the first \$10,000 in total equity for all vehicles.

Unlike income, we count assets for anyone in the W-2 group, adult or child.

 PPT 73

You must enter all sources of income and assets in CWW, even if they are disregarded. Be sure to go over those Gatepost pages in detail with parents to ensure you don't miss an income or asset. Entering information correctly is critical, as CWW will apply the rules for what is counted and what is disregarded based on what you enter.

 Remember to indicate if an asset is jointly owned so that the value is counted correctly for the portion the parent owns.  Additionally, indicate if the asset is not available to the parent. This tells CWW not to count it the asset calculation.

 PPT 74

Now that we have determined what is an asset and what is income, let's look at a few scenarios to see if we can pick out the income and assets. Right now, focus only on identifying the types of income or assets. We'll talk about what is counted or disregarded afterward.

**Note to Trainer:** As they are trying to identify income/assets and discussing what counts, use these prompts to help them as needed.

- **Income/Asset:** Remember, something they already have is an asset. Money they will be getting is income, whether earned or unearned.
- **Counted/Disregarded:** Who has the asset? Who receives the income? Are they part of the W-2 group? Are they a child?

 Katie is a 22-year-old single mother with an infant son, Josh, who is 4 months old. She has a pre-paid debit card and is not working at this time. Josh's father helps her when he can and pays child support. Katie reports Josh has a savings account her parents started for him. Katie says she borrows her mother's car, and is living at her parents' home in the apartment they made for her above the garage. She doesn't pay any rent.

- **Ask** What types of income do you see in this scenario? Type your answers in the chat.
- **Ask** What types of assets do you see in this scenario? Type your answers in the chat.

 **Click** to show highlighted answers and **explain** any they missed.

- *Income: child support for Josh*
- *Assets: Katie's pre-paid debit card, Josh's savings account*

**Ask** When you enter these incomes and assets in CWW, what would the system count or disregard?

- *Count: pre-paid debit card, savings account (assets count for children)*
- *Disregard: child support (this is regular payments/unearned income for the child)*

## PPT 75

Celeste is a 31-year-old single mother with two children: Sammy, age 10, and Johnny, age 7 months. Her brother, Ethan, age 20, lives with her. He has a part time job doing landscape work. Celeste has a pre-paid debit card and a checking account. She also has a 2015 Chevy Malibu that was a gift from her grandfather. She doesn't owe anything on the car. Celeste is getting unemployment because the restaurant she worked at as a kitchen manager closed last March. Sammy and Johnny are getting child support from their father.

- **Ask** What types of income do you see in this scenario? Type your answers in the chat.
- **Ask** What types of assets do you see in this scenario? Type your answers in the chat.

 **Click** to show highlighted answers and **explain** any they missed.

- *Income: Ethan's job, Celeste's unemployment, child support for Sammy and Johnny*
- *Assets: Celeste's pre-paid debit card, checking account, and 2015 Chevy Malibu*

**Ask** When you enter these incomes and assets in CWW, what would the system count or disregard?

- *Count: unemployment, pre-paid debit card, checking account, vehicle*
- *Disregard: child support, Ethan's income (he would not be part of the W-2 group), \$10,000 of the vehicle's equity value*

## PPT 76

Hector and Maria have 4 children: Sava, 17, Jose, 12, Selena, 10, and Juan, 5. Hector lost his factory job due to an injury, and Maria is getting SSDI due to a disability. Juan also gets SSI, as he has several health complications. Hector and Maria have a joint checking account and a joint savings account. Hector exhausted his short-term disability from his job, and is not able to return to the same employer. He is receiving unemployment. They have two cars, a 2005 Ford F150 truck and a 2015 Toyota Sienna minivan. Hector has a 401K from his previous job. They own their home. Sava has a part time job working at the neighborhood grocery store stocking shelves and making deliveries. Sava has an X-Pro Moped scooter that he uses to get to and from work. Maria said he saved and paid cash for it.

- **Ask** What types of income do you see in this scenario? Type your answers in the chat.
- **Ask** What types of assets do you see in this scenario? Type your answers in the chat.



**Click** to show highlighted answers and **explain** any they missed.

- *Income: Maria's SSI, Juan's SSI, Hector's unemployment, Sava's employment*
- *Assets: Hector and Maria's joint checking and savings accounts, truck, minivan, and home; Hector's 401K, Sava's moped*

**Ask** When you enter these incomes and assets in CWW, what would the system count or disregard?

- *Count: Maria's SSI (she is part of the W-2 group, but wouldn't meet the two-parent household definition), Hector's unemployment, savings and checking account, all motorized vehicles (truck/van/moped, assets count for children), Hector's 401K*
- *Disregard: Juan's SSI and Sava's employment (income for children does not count), \$10,000 in combined equity for all vehicles, the home (it is their primary residence and is valued at no more than 200% of the statewide median value for homes)*

Good job everyone! Knowing what is considered as income or an asset and what is counted, along with proper entry in CWW helps you determine financial eligibility for an applicant or parent.

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**Open Q&A**

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

**Estimated Time:** 15 minutes

 PPT 77**Note to Trainer:**

This section is a conversation to answer questions, reinforce best practices, and learn from each other. Based on questions/challenges, be prepared to share your screen and go into various systems to show processes, etc. Use webcams as appropriate.

- Start by answering questions about the topic of the week.
- Address burning questions and challenges from the introductions.
- Encourage other learners to share with each other for questions not related to policy and process.
  - Who else has experienced this? What did you do to help you move past this? Some of you already completed the \_\_\_\_\_ curriculum, what was a lesson learned for you?
  - Reinforce best practices you hear, etc.
- If time remains, solicit additional questions learners may have, or ask questions to invite sharing among learners.
  - What else can we show you today?
  - What is one of your go to resources during training?
  - What tip(s) do you have for people starting \_\_\_\_\_ curriculum?
  - What methods do you use to keep track of everything you are learning?

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**Closure**

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

**Estimated Time:** 5 minutes

 PPT 78

Before we end our session, take a minute to write down your AHA Moment from today.

**Invite** a few learners to unmute and share their AHA Moment. **Encourage** others to type theirs in the chat.

- Apply – What information from today do you plan to apply moving forward?
- Happen – How do you plan to make this happen?
- Action – What is the first action step you plan to take?

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## Goal Setting Session

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☀ PPT 1 & 79

👉 TN Appendix A



### Note to Trainer:

- Rename yourself in Zoom to include (PTT) after your name.
- 15 minutes prior to the session, display the PPT. 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 target icon, which is the Goal Setting session, to display the 7 ways to stay motivated 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 NWT Hub Class Information sheet to Reg Staff.

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## Icebreaker and Introductions

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**Purpose:** Build rapport between trainers/learners and learners/learners. Provide a space to share successes and challenges.

**Estimated Time:** 15 minutes

☀ PPT 80

**Turn on** trainer webcams. Welcome to our weekly W-2 New Worker Training Hub! Let's check in with each of you. When we say your name, please share the following with us (**encourage** learners to turn on webcams if available):

- Your Agency,
- Where you are at in your new worker training,
- A success from the last week,
- A challenge from the last week, and
- A burning question you have about new worker training or the W-2 program you want to discuss today.

### Note to Trainer:

- While learners are sharing, track their answers on the PPT slide. The trainer not sharing the PPT can use the annotation tools to mark next to the agency and NWT section. The trainer sharing the PPT can type directly into the white boxes for successes, challenges, and questions.
- Use your discretion as to which questions you can answer quickly and which ones to address during the Q&A.

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## Announcements and Updates

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**Purpose:** Share recent and upcoming news pertinent to learners (new workers in training).

**Estimated Time:** 5 minutes

 PPT 81

**Cover** any announcements or updates that are relevant to new workers.

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## Stretch at Your Desk

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**Purpose:** Encourage practicing self-care with quick breaks.

**Estimated Time:** 5 minutes

**Note to Trainer:** Turn on your webcam for this piece, and invite learners to do the same.

 PPT 82

Finding ways to stretch at your desk in between appointments can help you get through the workday.

 Are you ready for a stretch? Twists are great for detoxifying, lengthening the spine, and massaging your abdominals and obliques.

While seated, place your hands on the arms of the back of your chair, gently twisting your chest and abdomen to one side. Hold for 4-5 breaths, before repeating on the other side.

Self-care is important throughout the workday, not just before or after work. Use this stretch to give yourself a break when needed.

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## Topic of the Week: Goal Setting

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**Purpose:** Provide additional instruction in areas where learners (new workers in training) may struggle.

**Estimated Time:** 15 minutes

 PPT 83

One section of the EP is dedicated to parent goals. Let's discuss how we can develop goals with parents. Goal setting is one of the key driving forces in good case management. I feel it is like taking a road trip without a destination in mind or map to get there. As they say, if you don't know where you are going, how do you know when

you've arrive?. Setting SMART goals with a parent and steps to achieve them are important to progress and participation in the program.

### ☀ PPT 84

Developing SMART goals is a best practice. 🖱 SMART stands for Specific, 🖱 Measurable, 🖱 Attainable, 🖱 Relevant, and 🖱 Time-Based.

### ☀ PPT 85

But why set SMART goals?

- 🖱 It helps gain parent buy-in.
- 🖱 Parents are more likely to achieve their goals.
- 🖱 It helps parents stay on track.

Speaking of goals, let's take a look at the goal types available for W-2 parents.

### ☀ PPT 86

The various goal types are listed on the screen. To get started, I will read a definition of a goal type. Unmute to shout out the goal type, or type the answer in the chat.

Not required for program participation; helps strengthen the family and empower the parent.

🖱 *Personal Goal*

Parent's back-up field of interest; is attainable within the program.

🖱 *Secondary Employment Goal*

Goals related to education, skills or training, and overcoming barriers for parents to move in the direction of their employment goals; achievable while enrolled in the program.

🖱 *Other Program Goal*

Parent's chosen field of interest; is attainable within the program.

🖱 *Primary Employment Goal*

Aligns with the parent's career assessment results and career pathway; likely achieved beyond their program participation.

 *Long Term Career Goal*

## PPT 87

Next, we're going to give you examples of goals and we want you to identify which goal type it would fall under. Use your stamp annotation tool to indicate the goal type for each example. Remember, go to View Options, select Annotate, then select a stamp option.

 Accountant – Sue likes working with numbers and would like to become an accountant in the future. She knows she will need to complete several other steps before this can happen, including going back to school to complete her degree.  
*Long Term Career Goal*

*[clear annotations]*

 Complete an automotive certificate course – Bob would like to complete the Automotive Quick Service Technician certificate offered by the local tech college, as he knows this is important for his future.  
*Other Program Goal*

*[clear annotations]*

 Cashier/Customer Service – Sue is willing to take a job as a cashier or in the customer service field if needed. She likes to work with people and has good customer service skills.  
*Secondary Employment Goal*

*[clear annotations]*

 Mechanic – Bob likes working on vehicles. He has experience fixing cars and likes working with his hands.  
*Primary Employment Goal*

*[clear annotations]*

 Reduce stress – Sue knows she has a lot of stress in her life and needs to find ways to deal with it. She will try various coping strategies, such as drawing, journaling, yoga, and exercise to reduce her stress levels.  
*Personal Goal*

*[clear annotations]*

 Factory Worker – Bob wouldn't mind working in a factory if he can move around and doesn't have to stay in the same place all the time.  
*Secondary Employment Goal*

*[clear annotations]*

 Obtain Driver's License – Sue has never had a DL and wants one because the bus takes too long. She would like to pass the temporary licensing test by the end of next month.  
*Other Program Goal*

**Note to Trainer:** This is an **Other Program Goal** because it is a barrier that the parent needs to overcome to move toward her employment goals.

*[clear annotations]*

 Own a Business – Bob would like to own an auto repair shop someday. He thinks he would be a good and fair boss. He needs to learn more about being a small business owner and save money for business start-up.  
*Long Term Career Goal*

*[clear annotations]*

 Office Assistant – Sue has attention to detail and likes assisting others. She wants full-time, first shift work. Her career assessment results show her workstyles and interests are a good match for this type of work.  
*Primary Employment Goal*

*[clear annotations]*

 Spend quality time with kids – Bob wants to spend quality time with his children. He would like to take them to the zoo by the end of next month.  
*Personal Goal*

*[clear annotations]*

Now that we've chatted about the different goal types and looked at some goal descriptions, let's talk about breaking goals into more manageable steps.

## ☀ PPT 88

Bob has a personal goal of spending quality time with his kids and would like to take them on a trip to the zoo. This may seem like a straight-forward goal, but take a moment to think about what goes into a trip to the zoo.

**Ask** What is one thing might Bob need to do to prepare for a trip to the zoo with his kids?

**Note to Trainer:** Continue to ask for more things that Bob might need to do. As learners share ideas that are a close match to the answers below, **click** on the left side of the colored box in the PPT to reveal the answer. Learners may share ideas that are not listed, but also may be considered.

Spend quality time with kids– Bob wants to spend more quality time with his kids. He would like to take them on a trip to the zoo.

- Plan for the trip to the zoo. Figure out the schedule (travel, activities), what you will need to bring, etc.
- Choose a day to go to the zoo. Consider how long it will take to save money, schedules (work/school), and weather.
- Determine how much it will cost to go to the zoo (transportation, parking, admission, food, souvenirs, special attractions, etc.)
- Look up information on the zoo, including hours, location, and cost.

As you can see, even relatively simple goals can be broken down into goal steps, making it more manageable for parents to achieve their goals.

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**Open Q&A**

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

**Estimated Time:** 15 minutes

 PPT 89**Note to Trainer:**

This section is a conversation to answer questions, reinforce best practices, and learn from each other. Based on questions/challenges, be prepared to share your screen and go into various systems to show processes, etc. Use webcams as appropriate.

- Start by answering questions about the topic of the week.
- Address burning questions and challenges from the introductions.
- Encourage other learners to share with each other for questions not related to policy and process.
  - Who else has experienced this? What did you do to help you move past this? Some of you already completed the \_\_\_\_\_ curriculum, what was a lesson learned for you?
  - Reinforce best practices you hear, etc.
- If time remains, solicit additional questions learners may have, or ask questions to invite sharing among learners.
  - What else can we show you today?
  - What is one of your go to resources during training?
  - What tip(s) do you have for people starting \_\_\_\_\_ curriculum?
  - What methods do you use to keep track of everything you are learning?

---

**Closure**

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

**Estimated Time:** 5 minutes

 PPT 90

Before we end our session, take a moment to think about your OMI or OMG from today. An OMI is One Meaningful Idea to implement, and an OMG is one meaningful goal to pursue.

**Invite** a few learners to unmute and share their OMI or OMG. **Encourage** others to type theirs in the chat.

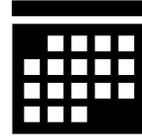
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## Participation Tracking Session

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☀ PPT 1 & 91-92

👉 TN Appendix A



### Note to Trainer:

- Rename yourself in Zoom to include (PTT) after your name.
- 15 minutes prior to the session, display the PPT. Greet learners as they arrive, and complete audio checks with them. Upload the notes handout if needed. 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 calendar icon, which is the Participation Tracking session, to display the word search slide. Copy the annotation directions from the TN Appendix and paste them into the chat. **Click** to PPT 91 to reveal the answers right before starting the session.
- Be sure to document who attended the session and submit the NWT Hub Class Information sheet to Reg Staff.

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### Icebreaker and Introductions

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**Purpose:** Build rapport between trainers/learners and learners/learners. Provide a space to share successes and challenges.

**Estimated Time:** 15 minutes

☀ PPT 93

**Turn on** trainer webcams. Welcome to our weekly W-2 New Worker Training Hub! Let's check in with each of you. When we say your name, please share the following with us (**encourage** learners to turn on webcams if available):

- Your Agency,
- Where you are at in your new worker training,
- A success from the last week,
- A challenge from the last week, and
- A burning question you have about new worker training or the W-2 program you want to discuss today.

### Note to Trainer:

- While learners are sharing, track their answers on the PPT slide. The trainer not sharing the PPT can use the annotation tools to mark next to the agency and NWT section. The trainer sharing the PPT can type directly into the white boxes for successes, challenges, and questions.
- Use your discretion as to which questions you can answer quickly and which ones to address during the Q&A.

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**Announcements and Updates**

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**Purpose:** Share recent and upcoming news pertinent to learners (new workers in training).

**Estimated Time:** 5 minutes

☀ PPT 94

**Cover** any announcements or updates that are relevant to new workers.

---

**Stretch at Your Desk**

---

**Purpose:** Encourage practicing self-care with quick breaks.

**Estimated Time:** 5 minutes

**Note to Trainer:** Turn on your webcam for this piece, and invite learners to do the same.

☀ PPT 95

Allowing yourself to unwind means you can continue your workday with a newfound energy. With the daily stresses that life offers, it's important to restore your mind and ground yourself. Let's try a quick grounding stretch.

🖱 Place your feet flat on the floor and cross your arms onto your desk. Lay your forehead onto your arms and breathe deeply for up to 5 minutes.

Be sure to take a few moments throughout your workday to ground yourself.

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**Topic of the Week: Participation Tracking**

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**Purpose:** Provide additional instruction in areas where learners (new workers in training) may struggle.

**Estimated Time:** 15 minutes

☀ PPT 96

This week, we're talking about participation tracking. We track participation on the **W-2 Participation Calendar** page. We are not going to cover every field or every type of entry. However, we will cover some key pieces of information you encounter when entering participation.

Entering participation tracking timely will save you work in the long run, ensuring that the correct benefit is issued to the parent. If participation tracking is not done timely, it could result in an overpayment. Another perk of entering timely, is you can identify

patterns of participation and non-participation by viewing the participation calendar. You can then discuss these patterns with parents. This can assist you in getting ahead of any potential obstacles to participation and adjust activities right away before parents become frustrated and lose momentum.

### ☀ PPT 97

Sometimes, parents complete their activities on days that do not match their schedule, making up their hours. Parents 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.

### ☀ PPT 98

Parents 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 99

On the flip side, parents 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 100

After entering participation information, the calendar shows a summary of the information. The calendar is color-coded to help you identify patterns of participation and non-participation.

What does each color represent?

 Black represents the number of hours the parent was scheduled to complete the activity.  Green represents the number of hours the parent completed.  Red

represents the number of hours the parent did not complete.  Purple represents the number of good cause hours.

### PPT 101

Let's review some examples of ways this page helps 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 parent is completing all activities except one*

**Ask** When reviewing this calendar with a parent, 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 parent'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 parent's feedback.*

### PPT 102

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 parent, 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 parent's EP, based on this calendar?

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

### PPT 103

Our participation entries look different again.

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

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

**Ask** When reviewing this calendar with a parent, 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 parent's EP, based on this calendar?

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

## ☀ PPT 104

When entering participation, don't forget about the handy  Participation and Good Cause buttons that appear on the calendar. Use these buttons to your advantage when entering participation and good cause information. Even if you use these buttons to complete the entries for the week, you can still edit individual entries as needed.

## ☀ PPT 105

Speaking of good cause, remember that both you and parents play a role in determining good cause for missed activities. Parents 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 parent'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 106

Let's look at some scenarios and determine if the parent 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 parent'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 11.3.3 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.

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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**Open Q&A**

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

**Estimated Time:** 15 minutes

 PPT 107**Note to Trainer:**

This section is a conversation to answer questions, reinforce best practices, and learn from each other. Based on questions/challenges, be prepared to share your screen and go into various systems to show processes, etc. Use webcams as appropriate.

- Start by answering questions about the topic of the week.
- Address burning questions and challenges from the introductions.
- Encourage other learners to share with each other for questions not related to policy and process.
  - Who else has experienced this? What did you do to help you move past this? Some of you already completed the \_\_\_\_\_ curriculum, what was a lesson learned for you?
  - Reinforce best practices you hear, etc.
- If time remains, solicit additional questions learners may have, or ask questions to invite sharing among learners.
  - What else can we show you today?
  - What is one of your go to resources during training?
  - What tip(s) do you have for people starting \_\_\_\_\_ curriculum?
  - What methods do you use to keep track of everything you are learning?

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**Closure**

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

**Estimated Time:** 5 minutes

 PPT 108

Think about everything we discussed today – your successes, challenges, questions, and the topic this week Participation Tracking. Then, choose one of the questions on the screen to answer. **Ask for** volunteers to share, covering all questions if possible.

- What do you know today that you did not know yesterday, and that will help you tomorrow?
- What will you do differently as a result of what you learned?
- What is a takeaway you plan to share with others you work with?

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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**

Access annotation tools by clicking on the three dots next to the name of the trainer's screen you are viewing at the top or by hovering your mouse over the screen to have a green pencil display in the lower left..

**Notes Handout**

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

**Phone Number**

If you don't have a mic/speakers, connect to the audio by calling 312-626-6799. Meeting ID 852 8762 7641.

**Message for Learners Inappropriate for the Hub**

We appreciate your interest in attending this session. However, the W-2 NWT Hub is designed for workers who are currently in NWT. If you have any questions or concerns, please contact your ATL.

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***Matching Activities and Codes Session***

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**W-2 Manual**

Access the W-2 Manual at <https://dcf.wisconsin.gov/manuals/w-2-manual/Production/default.htm>

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***Navigating the W-2 Manual and Participation Tracking Session***

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**W-2 Manual**

Access the W-2 Manual at <https://dcf.wisconsin.gov/manuals/w-2-manual/Production/default.htm>