Trainers Notes

W-2 New Worker Training:

Simulated Interactive Interview

Objectives and Expected Outcome:
The simulated interactive interview experience will give the trainer a better idea of the New Worker's level of comprehension of the W-2 program, policy and procedures. By observing the New Worker's interactive interviewing skills, the trainer can offer some insight into errors or omissions they might have made. The trainer can also use those instances as a learning tool to discuss what the ramifications might be to the W-2 program.

The New Worker will have the opportunity to experience and practice their interviewing skills. What to say and how to say it comes from experience. Conducting an interactive interview that collects the necessary information, is recorded properly in CWW/CARES, and is conducted in a conversational manor, is an important tool. It will also give the New Worker a better understanding of how to begin to build a positive relationship with their customers.

This exercise will also give the New Worker an opportunity to "connect the dots" of their training modules. By bringing together the pieces of their curriculums; beginning with client registration to informal assessment to Up-Front Workforce Attachment policies to eligibility to placement and activity assignment; it will help the New Worker understand the "big picture" of the application process and experience the "flow" to eligibility, placement, and ongoing case management.

Introduction

Conducting a simulated W-2 application with a New Worker is an optional activity requested at the discretion of the assigned New Worker trainer. It is recommended that the trainer take several factors into consideration when making that decision:

- Their personal experience with the individual
- Input from other trainers involved with the New Worker
- Input from the ATL/Supervisor

If the decision is made to conduct the on-site interactive interview activity, the New Worker and their ATL/Supervisor should be made aware of what will occur in the activity, why it is being done, and the expected outcome.

Schedule the activity in a private area with no distractions or interference from other staff. This may involve providing your own laptop for the interview. Expect the activity may take the whole day for the FEP/CM and probably ½ day for the Eligibility FEP and the Case Manager.

This does not have to be a one-on-one activity. You may have several persons involved with this exercise. If so, offer different roles (i.e. RS, Intake FEP, ongoing Case Manager). In this situation, make it clear that anyone can ask a question or offer a comment at any time.

Inform the New Worker that you will not volunteer information. Information will only be supplied after the appropriate question has been asked. However, it will be critical to the exercise that if important information has not been properly gathered, the trainer stops and points out the error in the interview and how the omission of this information could adversely affect the W-2 case, either potential eligibility or case management.

After the exercise, provide the trainer and the ATL/Supervisor with feedback regarding the experience.

These Trainer Notes will provide guidelines on how to conduct the exercise and point out areas that can provide an opportunity for a positive learning experience or an "a-ha" moment for the New Worker.

> **Remember:** This is just to give you guidelines. Interject your own personality and ideas into this exercise. Have fun.

There are two sections of guidelines. The first section will be for **FEPS**. This includes those that just determine eligibility to full Case Managers. The second section will be used for those who only provide **Case Management** services. For these individuals, it will be necessary to have a confirmed W-2 case already loaded.

Interactive Interview Simulation for FEPS

This activity will begin with Client Registration and continue through up-front workforce attachment, eligibility, placement, and activity assignment. This section will only provide you with guidelines to use during the exercise. You will make up your own particular demographics of a case.

This guide will not list every page and screen, just those that you may want to use as a learning point.

For those FEPs that only do eligibility, the activity will end with confirmation of an eligible W-2 case and referral to Work Programs. All others will complete the full exercise.

The New Worker will initially assume the position of the Resource Specialist and in this exercise the RS does CR (this may or may not be the case in their agency). Tell them to provide an orientation to W-2 while they are doing CR and recording the informal assessment in Work Programs.

Supply all items of verification by handing them imaginary documents. Tell them what you have supplied. If they ask for something not required, question them as to why they need this.

Client Registration

- Female applicant between the ages of 20-30.
- 1 child – at least age 2 or older
- Last job ended 6-months ago when the factory closed
- Unemployment ended last month
- Has never been on W-2 or any other program
- No income
- Supplies SSN and date of birth.
- Requests W-2 only – if asked why – the applicant states that her Mother lives next door and supplies them with food at this time and they have insurance coverage from her last employer that will be in effect for another 4 months. Her Mother will also supply childcare.
- Signs the application

Learning Points

- Ask many questions about the process the applicant will be going through.
- Ask about payments and other options for more immediate assistance
- Did they ask about any immediate/emergency needs, such as "do you have a place to stay", "do you and your child have food to eat tonight", "and does your family have any safety issues". How would they address these questions and supply appropriate referrals?
- Would you let an applicant leave your agency if you were not able to offer immediate referrals or assistance?
- Correct determination of whether this individual should be referred for assessment/up-front workforce attachment activities.

Resource Specialist

The RS will begin the application and take the RFA just far enough so the applicant passes clearance.

RFA Summary

- Did they enter begin mm/yy?
- Explain why this will save them time

After passing clearance – point out that RFA number becomes Case number.
Case can now be taken to CARES ACEO to begin the informal assessment process.

- What would they need to do if this was a 2-parent household?

WPEN

- Why is it important to know if the applicant is a veteran?

WPED

- Ask when must an informal assessment be completed per policy?
- Completed the 11th grade and is not currently in school

WPAW

- Make sure the applicant was engaged in a conversation regarding the type of work she would like to do, not just list the last work she did.
- The applicants primary program employment goal is to become a pharmacy tech and the secondary goal is to be a Medical Assistant
- Remember that these goals must be achievable within the timelines of the W-2 program. To test the New Worker's knowledge, have the applicant say she would like to be a Registered Nurse and see what the worker's response is.
- If asked – the applicant has excellent keyboarding skills

- If asked – the applicant teaches Sunday school and volunteers at their local hospital.
- If not asked these questions – stop and remind them why we gather this information and how useful it may be to finding employment using these transferable skills.
- The applicant prefers to work 8-5 and not on weekends, but will for the right job.
- If asked – loud noises give the applicant a headache.
- If not asked – remind them why we ask about accommodations we may need to be aware of for work experience and employment referrals.

WPEH

- Last worked for Foremost Factory
- Had worked there for over 3-years but the factory closed 6-months ago
- Worked on an assembly line sorting gaskets. Hated the job and never wants to work in a factory again.
- Made $11.00/hr, worked 40 hours a week. Had full medical and vacation benefits.
- Remind interviewer what the really important information to collect is – job duties and WHY the job ended. What could have kept the applicant in this job? (In this case, nothing.) But for many, it's an opportunity to see patterns of job loss and reasons. But since we also want to focus on strengths – collect those skills learned on the job.

WPJR

- Applicant borrows a vehicle from her Mother
- However, the applicant's driver's license has been suspended due to past over due fines.
- Why is this important information to document?
- How can the W-2 agency possibly help in this situation?
- Will commute 20 miles for the right job
- Mother will provide child care
- If asked – Energy Assistance would be very helpful and so would rental assistance.
- If asked – applicant responds they have a good work history, honest, reliable and motivated
- If not asked – why is this valuable information?
- Can we use this on a resume?
- If asked – applicant is not involved with any other agencies like Child Welfare
- If not asked – explain why it is critical to gather this information.
- Applicant declares that she has no barriers to employment

WPRU

- What should be in the summary of decision?

AIPO

- Is the applicant going to be assigned to up-front activities? If so, why?
- What criteria should be used to make this decision?

WPJS

- The applicant discuss' that a long term goal (dream job) is to be a Registered Nurse
- She decides that a short term goal (leading to obtaining her dream job) is to first get a HSED
- The applicant has many personal goals (after she thinks about it for a few seconds)
    - Better apartment
    - See the dentist for a toothache
    - Get child support ordered for the child
    - Lose 10 lbs

WPAS

- An EP is jointly developed
- Applicant asks many questions about the activities assigned
- Is it clear where to go, when to be there, what hours, and why is the applicant doing this activity?
- If assigned TABE – the applicant tells them they don't know what that is and why they have to take it. What is it used for? The applicant makes them explain it ALL. The applicant states "they have never taken this test and how can you assign something when you don't even know what it's all about???"

WPCH/WPCS

- Did the New Worker enter the appropriate "U" codes?

Was there a return appointment scheduled? Was the purpose of the next appointment explained, who will the applicant see, and how can the applicant contact them if they need to reschedule the appointment?

Learning Points

- What is the most important information gathered at the RS appointment?
    - Food, shelter, safety concerns are addressed
- Is assignment of up-front activities appropriate for everyone?
    - If not, why?
    - Who would not be appropriate for up-front?

FEP Appointment (initial)

Take this opportunity to ask about the application process that occurs in their agency. Would the RS do the process just completed? What might prevent them from being able to do that process? (If the case has not been pulled into their county/region, they will not be able to make data entry into CWW/CARES. It will be done on paper.) If that is the case, the FEP must then enter the informal assessment.

Explain that the informal assessment that we just did was very in-depth. It is the RS responsibility to complete an informal assessment. Though it may not be in-depth they must gather enough information to determine whether up-front workforce attachment activities are appropriate. **The information gathered is too important to rush.**

Also discuss the time frames.

- When must the RS appointment occur?
- When will the FEP appointment occur?
- When should it occur sooner?
- What will determine when these appointments occur?
- What should occur at the initial FEP appointment?

CWW Case Summary

- Continue with driver
- Enter the mm/yy

Household Members

- The applicant supplies a birth certificate and SS number – s/he has lost the card.
    - Why is it okay to just supply just the number?

- The child's birth certificate and SS card are supplied.

Learning Point – make sure they have asked questions about all individuals living in the household correctly. Explain all people must be listed – whether or not they will be connected to the W-2 case.

Program Requests

- Does the New Worker have an understanding of the programs?
- Have them explain a few to the applicant.

General Case Information

- Supply lease to verify address
- The applicant has lived in WI all her life.

Permanent Demographics

- The applicant refuses to supply the child's race.

Current Demographics

- The applicant has never been married.

Benefits Received

- None

School Enrollment

- The applicant has completed the 11th grade and is not currently enrolled in school.

Individual Non-Financial

- The applicant answers "NO" to all questions.

Absent Parent

- John Smith is the father's name
- Address unknown
- Not adjudicated
- The applicant will cooperate with the Child Support Agency.
- She asks questions about the Child Support referral process. What will happen? What will happen if she doesn't want to cooperate? Can he get custody of her child if she goes for Child Support?
- Make sure they do the good cause form.

Assets

- This is optional – you may want to include a bank account and/or a vehicle. Just don't have it make the application ineligible. Supply all requested verification.
- Ask if any other programs have asset limits. No, they don't.

Employment Gatepost

- The applicant answers "No" to all.

Unearned Income Gatepost

- The applicant answers "No" to all.
- Make sure they ask the questions. You may want to ask them to explain a few of the questions.

W-2 Pre-Eligibility

There is a lot of confusion regarding the proper use of this page. Have the New Worker explain how and why this page is used.
For this application:

- Are there Pre-Eligibility Requirements? "Yes"
- Have the Pre-Eligibility Requirements been met? "?"
- Why is it "?" right now?
- When could it be different?

Initiate Eligibility

- W-2 should be pending – why?

Informal Assessment and EP

- Should be reviewed and possibly updated
- Discussion of activities thus far

Learning Points

- When could this appointment be very different?
    - Up-Front wasn't appropriate to continue
    - Non-financial or financial ineligibility
- Why should AE be done during the initial appointment? (Gives applicant time to provide any items of verification)
- What is the primary purpose of this appointment?
- Has the applicant received the Participation Agreement and was it thoroughly explained? Did the applicant sign the PA? Why is this signature so important? It is required by policy that even if the RS has supplied the PA, the FEP still must discuss it.

FEP Appointment (2nd)

What is the purpose of this appointment? The applicant asks to have it explained to them. The FEP has received 100% attendance reports on activity assignments.

W-2 Pre-eligibility

- Change "?" to "YES"
- Have the New Worker to explain when it would be appropriate to enter a "NO" and what would happen to the case.
- What will be their criteria in determining if the applicant met pre-eligibility requirement?

Initiate Eligibility

- W-2 case should be passing

AGEC

- Confirm

AIWP

- Refer to WP

Eligibility Only FEP will end here.

WPWW

- What is placement and why. Was it explained to the participant?
- The participant asks about the initial payments.
- The participant acts a little desperate about these payments. What can the FEP do?

The informal assessment should be reviewed at this point. EP must be updated. The participant tells the FEP that they have been to the dentist (this was listed as a personal goal on WPJS).

WPAS

- What will be an appropriate time span for this EP?
- How will you determine this?
- Were the activity assignments discussed with the participant?
- Does the participant understand and agree with why they were assigned to these?
- Do they lead toward employment goals?
- Are they measurable?

WPCH

- Enter component codes
- Point out that they don't need to end-date the "U" codes – they will end automatically as soon as any other component is entered.

At this point allow for any other questions they may have. Talk about how they will approach the ongoing case management of this applicant. What will you be looking for? How will you assist in reaching employment goals and job retention?

If time allows, you may add a change to the case, such as temporary incapacitation or child being diagnosed with a serious illness.

Interactive Interview Simulation for Case Managers

This section is for those that do not determine eligibility for W-2. They are involved with the day-to-day case management of the participant. They are involved with the task of career assessing and matching the right participant with the right job.

The desired outcome will be that the Case Manager will be able to perform an effective informal assessment, assist in developing goals, assign appropriate activities and determine what assessments would be appropriate for that individual.

Even though the Case Manager may or may not directly enter the informal assessment, they must know where to look for information and how to use the information found.

For this simulation, it will be necessary to pre-load an eligible W-2 case and confirm the case. Use the same information that is used for the FEP simulation.

Confirm the case on AGEC and refer the case to WP on AIWP. Place the participant into a CSJ placement.

Begin the simulation at WPEN.

WPEN

- Why is it important to know if the participant is a veteran?

WPED

- Ask when must an informal assessment be completed per policy?
- The participant completed the 11^{th} grade and is not currently in school

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- If not asked – remind why we ask about accommodations we may need to be aware of for work experience and employment referrals.
- Why is all this information important to the Case Manager?

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- Applicant declares that she has no barriers to employment
- How does the Case Manager use this information?

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Discussion Points

- What assessments might be appropriate for this participant? Why?
- How will you use the results of the assessments?
- What workshops will you offer and what will be the desired outcomes?
- What LMI sites will you use?
- How will you use this with the participant?
- Would this participant be appropriate for a specialized job skills training?
- What type of training?
- How will you interact with the FEP and Job Developers?
- How will you ensure co-case management with other staff?
- How would you describe your role in job retention?