**Assessment**

**Trainer Guide**

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# System Entry Activities

## Assessment

The following information is for those in the following curriculum:

* FEP

### Email Guidelines for Responding to Trainees

#### Copy and paste to e-mail:

In this section, we are reviewing your Assessment entries to ensure you have correctly entered a complete informal assessment and summarized the assessment in PIN comments.

#### Subject Lines - Choose one:

* Assessment (case name) – COMPLETE
* Assessment (case name) – 1st REVIEW (or 2nd, etc.)

#### Feedback - for each case, choose one of the following:

* Assessment complete. You correctly entered all pages as instructed, entered comments, and recorded an informal assessment.
* Use the format below to list the Page Title and error.
  + Example:

**Work History –** Carmen had two records of past employment that should be recorded.

*Additional comments as needed if additional errors are made. Also add something that the worker did well.*

## Case Checklist

### Carmen

#### WWP

**Informal Assessment**

* Ensure the informal assessment was submitted (no green checkmarks; Submit button is greyed out)

**Language**

* She speaks Spanish at home (fluent)
* She is fluent in English
* She does not need an interpreter
* Notes: she hopes bilingual skills will help her with job search

**Work History**

* Unemployed
* She is looking for work (no one calls her back for an interview)
* Kwik Trip, Platteville, WI
  + Quit three months ago, and lasted 2 years
  + Include details of why she quit (hours changed to 2nd shift)
  + Worked 35 hrs./wk. at $10.25/hr.
  + Cashier - waiting on customers, running the cash register, cleaning floors, stocking shelves, setting up store displays
  + Notes: Working 2nd shift caused difficulties for childcare arrangements
* Walgreens, Platteville, WI
  + This job was 4 years ago, and lasted 9 months
  + Include details of why she was fired (poor attendance)
  + Worked 30 hrs./wk. at $9.00/hr.
  + Cashier – waiting on customers, running the cash register, cleaning floors, stocking shelves
  + Notes: It was difficult juggling being a new mom with work
* She has not completed a Career Assessment
* Notes: she likes customer service and wants 1st shift hours

**Work Programs**

* No other work program participation

**Education History**

* No degree, but she has attended school
* Completed 11th grade at Platteville High School (7 years ago)
* Notes: interested in obtaining her HSED

**Post-Secondary Education**

* No post-secondary education

**Military Services**

* No military service

**Housing**

* Renting - $730.00/month, started 1 year ago
* Previous housing history should be entered
  + Rented - $650.00/month, was not evicted, started 2 years ago and lasted for 1 year
* Answer No to remaining questions
* Details and/or Notes: concerned her rent is too high and wants to find a cheaper apartment
* Action Needed (Worker task) – refer to subsidized housing with a due date of 1 week from today and information in details section

**Transportation**

* Has a personal vehicle that is insured and registration is current
* Has a valid driver’s license, expires 6/2028
* No CDL
* Action Needed (Worker task) – provide transportation funding, ongoing

**Legal Issues**

* No legal issues

**Participant Barriers**

* No participant barriers
* Domestic Violence section should be completed

**Child & Youth Supports**

* Informal daycare for Lucia
  + Details: Carmen’s mom watches Lucia
* Lucia has no special needs
* Notes: she would like certified daycare, as that would be more stable
* They are not participating in any other programs and/or services
* Action Needed (Participant task) – apply for WI Shares including details to follow up with FEP after eligibility is established and IM contact information, high priority

**Family Barriers**

* No family barriers

**Non-Custodial Parent**

* She is not an NCP

**NCP Referral**

* Damien is not paying child support – unemployed
* He is not interested in work program
* He does not have contact with Carmen or Lucia, but Carmen provides a phone number
* Child support order is $200/month

**Apps**

* Three entries in Action Needed
  + Two worker tasks (referral to subsidized housing, and providing gas cards)
  + One participant task (apply for WI Shares)
* Two entries in Work History
  + Kwik Trip
  + Walgreens
* One entry in Contacts
  + NCP - Damien
* No entries in Participant Barriers or Test Scores

**Job Readiness**

* Work Preference Questions
  + Wants to work in an office setting as a receptionist, or in customer service
  + Likes working with people and is a good communicator
  + Needs to obtain her HSED
  + Unsure who may be hiring for these types of jobs and would like assistance in identifying potential employers
  + Would like to avoid working with a micro-manager
  + Prefers a first shift job about 20 minutes or 10 miles from home
* Contact Questions
  + Voicemail and email are set up
  + Can check voicemail throughout the day
  + Does not always have access to internet to check email

**PIN Comments**

* Multiple PIN Comments entered
* Appropriate comments related to Carmen’s informal assessment and documentation of actions
  + Details should tell the story of Carmen and her scenario
  + No “alphabet soup”; acronyms should be spelled out
  + Comments should explain worker rationale for decisions
* Comment Types: Informal Assessment, Job Readiness/Career Assessment
  + Example Informal Assessment Comment:   
    Carmen reads, writes, and speaks English. She is not currently employed, and has experience working as a cashier at Walgreens and Kwik Trip. She hasn’t worked for the last three months, but has been looking for work. She wants to find 1st shift, customer service work with consistent hours. Carmen's highest level of education is 11th grade. She is interested in getting her HSED. She has never participated in another work program or served in the military. Carmen currently is renting an apartment, but is concerned her rent is too high. I referred her to subsidized housing and provided the contact information for the local CAP agency. Carmen has her own vehicle and a valid driver's license. Carmen expressed a need for transportation assistance and I will provide gas cards for her to attend appointments and complete activities. Carmen reports no legal issues, personal barriers, family barriers, or children living outside the household. Her mom watches Lucia when she’s not in school, but Carmen would like to find a more stable childcare arrangement. I provided the contact information for Wisconsin Shares. Carmen will follow up with me after she establishes Wisconsin Shares eligibility. She has no contact with Lucia's father, Damien.
  + Example Job Readiness Comment:  
    I discussed the Work Preferences and Contact Questions with Carmen during today's appointment, and will complete the remaining questions at a future appointment. Carmen wants to work in an office setting as a receptionist or in customer service because she thinks she is a good communicator and likes to work with people. She identified she needs to get her HSED to get a job in these fields. Carmen wants to avoid working for a micro-manager, and would like 1st shift work within 20 minutes or 10 miles from home. Her voicemail and email are set up. Carmen states she doesn't always have internet access to check her email. We discussed locations she can check her email, and she decided she will check it at the library or the Job Center at least four times a week.

### Haylee

#### WWP

**Informal Assessment**

* Ensure the informal assessment was submitted (no green checkmarks; Submit button is greyed out)

**Language**

* She speaks English

**Work History**

* Unemployed – caring for a family member
* Completed Career Assessment in the past, does not remember results
* Asyst
  + Lasted four years, ended one year ago
  + Details: lost position due to Parker’s barriers/needs and unable to find suitable childcare for him
  + Full time. Started at $12.50, ended at $16.00
  + Molding Technician - setting up, operating, and tending to plastic molding machines
  + Notes: she liked this position

**Work Programs**

* No other work program participation

**Education History**

* Has HSD
* Attended Tremper High School 16 years ago

**Post-Secondary Education**

* Attended Gateway Tech College in Kenosha
* Last attended 15 years ago, completed 2 semesters
* Studied Accounting
* Does not have a degree, certificate, or license
* Notes: she left because she was not enjoying it, wanted to work and make money like her friends, she wishes she would have finished her degree, feels that obtaining degree would open employment doors for her

**Military Service**

* No military service

**Housing**

* Renting - $700.00/month for the last year
  + Details or Notes: Luka (boyfriend) helps when he can
* Previous housing history should be entered
  + Rented - $685.00/month
  + Moved due to noise
  + Lived there two years
* No action needed

**Transportation**

* Uses public transportation
* Driver’s license is suspended
  + Details: she has fines that she cannot afford to pay
* Action Needed (Worker task) – transportation funding, ongoing

**Legal Issues**

* No legal issues

**Participant Barriers/Participant Barrier**

* No Physical Health issues
* Mental Health issues – sees a counselor weekly
* Mental health barrier
  + Post-partum depression diagnosed two weeks ago, has weekly appointments with counselor, does feel like it will affect her ability to participate
  + Contact for counselor, Jane Jones, should be included
    - [jonesj@communitypartners.org](mailto:jonesj@communitypartners.org)
    - 952-555-1444
    - ROI is signed
    - Treatment/Assessment Provider as the Contact Type
  + Referred for a formal assessment
  + Accommodations provided for difficulty sleeping (flexible schedule) and difficulty concentrating (allowed to carry a notebook to help focus)
* No AODA issues
* No Cognitive or Learning needs
* Domestic violence section should not be completed

**Child & Youth Supports**

* Two children under 12
  + Parker, age 9
  + Sophia, age 3 weeks
* Parker has childcare (when allowed) and special needs
  + Details: when available due to behavioral issues
  + Ensure no confidential information is entered
* Sophia does not have childcare arranged, no special needs
* Participating in Birth to 3, but not Head Start
* Receiving WIC
* Action Needed (2 worker, 1 participant)
  + Referral to Child Care Provider Resources with information in details section (worker)
  + Referral to Head Start with information in details section (worker)
  + Apply for WI Shares with information in details section (participant)

**Family Barriers**

* Parker receives SSI for autism
* Haylee has caretaker responsibilities
  + Details: Parker’s behavior issues require supervision at all times
* Concerned about ability to participate
  + Details: she will need a flexible work activity schedule due to Parker’s barriers
* Parker’s disability does cause behavioral problems
* Action Needed (Worker task) - Provide Need to Care for Disabled Family Member form

**Non-Custodial Parent**

* Haylee is not an NCP

**NCP Referral**

* Simon is Parker’s father
  + Not interested in the program (employed)
  + Contact information (phone) entered
  + Sees Parker 1-3 times per month
  + Child support order $200.00/month
  + Details: Simon would like to spend more time with Parker, but he doesn’t know how to handle his behavioral issues
* Luka is Sophia’s father
  + Not interested in the program (employed)
  + Contact information (phone and address) entered
  + Sees Sophia 1-2 times per week
  + No child support order

**Apps**

* Five entries in Action Needed (four worker and one participant)
* One Work History
* One Participant Barrier
* Three Contacts (Jane, Simon, Luka)
* No Test Scores

**Job Readiness**

* Work Preference Questions
  + Not sure what type of job she would like
  + Enjoyed her manufacturing job, but wants to consider completing her accounting degree
  + Interested in working with analytical types of jobs because she likes problem solving
  + Furthering her education would be essential
  + Unknown employers/companies where job may be available
  + Wants to avoid full-time work
  + Work hours during the mid-day would work best
  + Wants to be close to home, perhaps 5 miles or 30 minutes away
* Contact Questions
  + Voicemail and email are set up
  + Needs to get in habit of checking voicemail

**PIN Comments**

* Multiple PIN Comments entered
* Comment Types: Informal Assessment, Job Readiness/Career Assessment
* Comments related to informal assessment, and documentation of actions
  + Details should tell the story of Haylee and her scenario
  + No “alphabet soup”; acronyms should be spelled out
  + Case worker rationale for decisions is explained
  + Confidential medical diagnoses should not be mentioned

# Quia Activities

## W-2 Assessment Quiz

* Review the scores/questions missed and provide appropriate feedback. If it’s a low score, make some recommendations for things to review.
  + A passing score is 80% or above.
* Copy the ATL on your responses.

# Next Steps

## Requesting the Next Curriculum

1. Request the correct curriculum based on job function/curriculum assigned.
   1. **FEP**
      1. Request: Placement
2. Contact e-mail to prep for next curriculum
   1. Send “E-mail Text” below

## Email Text

### FEP

#### Before Placement

**Subject Line: Next Steps: Placement**

You have finished Assessment, so now it’s time to determine appropriate placement on both of your cases.

The first step is to complete a CBT that covers the W-2 Placement Policy. Then you will complete the Placement process for both of your cases. The System Entry Guide: Placement guides this process. Be sure to read all the related resources, follow the Guide step by step, and complete all activities as assigned.

After you have completed your entries, submit your case numbers to the Partner Training Team for review. If you have any questions or have any problems, contact PTT training support at [PTTTrainingSupp@wisconsin.gov](mailto:PTTTrainingSupp@wisconsin.gov).