**Client Registration**

**Trainer Guide**

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# System Entry Activities

## Client Registration

The following information is for those in the following curriculums:

* Resource Specialist
* FEP

### Email Guidelines for Responding to Trainees

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

In this section, we are reviewing the Client Registration entries to ensure you have correctly completed the W-2 request for all cases.

#### Subject Lines - Choose one:

* Client Registration – COMPLETE
* Client Registration – 1st REVIEW (or 2nd, etc.)

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

* Client Registration complete, comments entered documenting the request. Good job!
* Client Registration complete, need comments. Go to the RFA Comments page to enter these items.
* The Complete Request page needs RFA request date
* You have entered an RFA Extension Date and Reason. Please delete it on the Complete Request page. These fields are used only for extending the 30-day timeline for completing a program request and are rarely, if ever, used for the W-2 program.
* Client Registration complete, comments entered documenting the request. However, you proceeded a bit further in the process than you should have and started the application. Leave it for now, and when you get to Eligibility, you can correct any errors by following the System Entry Guide provided for that course.

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

## Case Checklist

### Carmen

#### W-2 Request

* RFA Type – ES
* Carmen, 24 years old
* Comment: Carmen is applying for W-2, for assistance in obtaining employment. She has one daughter, Lucia, age 6.
* There should be no extension request. W-2 has case processing time frames in which a W-2 case eligibility should be determined within 12 working days. This could be extended up to 30 calendar days if needed by the customer to provide verification and the W-2 agency also is assisting the customer in obtaining the verification
* **Stop** after Client Registration is complete

### Haylee

#### W-2 Request

* RFA Type – ES
* Haylee, 34 years old
* Appropriate comments for the case, such as case composition and that she is applying for W-2 for financial assistance and help finding a job.
* There should be no extension request. W-2 has case processing time frames in which a W-2 case eligibility should be determined within 12 working days. This could be extended up to 30 calendar days if needed by the customer to provide verification and the W-2 agency also is assisting the customer in obtaining the verification
* **Stop** after Client Registration is complete

# Quia Activities

## Client Registration 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. **Resource Specialist**
		1. Request: Reinforcing W-2 in the Classroom (RS)
		2. Request: W-2 NWT Completion (RS)
	2. **FEP**
		1. Request: Eligibility for FEPs
2. Send email text below.

## Email Text

### Resource Specialist

#### Before Completion

**Subject Line: Next Steps: NWT Completion**

You’re on the final stretch! One more curriculum is needed to wrap up any loose ends and complete Initial W-2 New Worker Training. The W-2 NWT Completion course is related specifically to your job function. You will complete a final assessment and score a minimum of 80%. You can review any of the courses you’ve taken in preparation for this assessment. You’re almost there!

### FEP

#### After CR/Before Eligibility

**Subject Line: Next Steps: Eligibility**

You have finished Client Registration, so now it’s time to determine eligibility on both of your cases. You will enter additional people in the household and collect all non-financial and financial information.

The first step is to complete a CBT that covers policies related to eligibility for the W-2 program. Then you complete the Eligibility process for both of your cases. The System Entry Guide: Eligibility 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 in CWW, 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.