**Case Closure**

**Trainer Guide**

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# System Entry Activities

## Case Closure (FEP Only)

Copy and paste to e-mail: In this section, you closed both your cases in CWW and disenrolled them from Work Programs. We are reviewing your CWW case closures and reasons as well as the Work Programs disenrollment processes.

#### Subject Lines - Choose one

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

#### Feedback - For each case, choose one of the following

* Case closures are complete. You correctly closed your cases in CWW and disenrolled all individuals from Work Programs. Comments are entered correctly in both CWW and WWP.
* Provide specific feedback on specific errors.
	+ Examples:

**Carmen Work Programs** – Carmen is still enrolled in Work Programs. You must disenroll her in WWP on the Participant Summary page.

**Luka Work Programs** – Luka has been disenrolled from Work Programs, but needs comments entered in WWP regarding the reason for disenrollment.

**CWW** – This case is closed, but for the incorrect reason.

## Case Closure Checklist (FEP Only)

### Carmen

#### CWW

* New address in Illinois should be entered
	+ Moving to Rockford, IL
* Current Demographics Page
	+ Change Resides in WI and Intent to Reside in WI to No
* Enter episode End Date on the W-2 Placement page as of today’s date
	+ If learners do this on the same day as they completed Ongoing Part Four, they will need to first clear the future placement.
* Ensure the correct reason codes of:
	+ 238/239 (No longer resides in WI, Does not intend to reside in WI)
* There should be closure comments in CWW reflecting Carmen’s move to Illinois
	+ Example Comment:
	Carmen reported that she is moving to Rockford IL this week. I updated her address. Her W-2 case is now closed due to not living in WI.

#### WWP

* W-2 Participation Calendar
	+ Full participation entered on the W-2 Participation Calendar
	+ PIN Comments - Document her move to Illinois, participation, and case closure
		- Comment type – General, Participation Tracking
* Employability Plan
	+ Goal Steps completed as appropriate prior to ending the Employability Plan
	+ Auto populated End Dates
	+ Goals End Reason – Disenrollment
	+ JR - Actual End Date of today and JR Completion Reason – Disenrollment (If JR had a future start date, then the activity will be deleted and not show in the record.)
* Disenrolled from work programs on the Participant Summary page
* PIN Comments, Comment Type – Disenrollment
	+ Example Comment:
	Carmen reported that she is moving to Rockford IL this week. Her W-2 case is now closed due to not living in WI. I ended her EP and disenrolled her from work programs.

### Haylee

#### CWW

* Enter Episode End Date on the W-2 Placement page, and enter a work program end reason of 136 and/or 219
	+ Query – Confirmed Assistance Group Summary
* Ensure the correct reason code of:
	+ 136 (Loss of Contact with the Agency), or 219 (Failed to Complete Job Search Activities)
* There should be comments about why the case is closing

#### WWP (Haylee and Luka)

* W-2 Participation Calendar
	+ Entries on the W-2 Participation Calendar showing no participation in any activities.
	+ PIN Comments - Document disenrollment, non-participation, repeated and varied attempts to re-engage in work programs, and case closure
		- Comment type – General, Attempted Contact, Participation Tracking, Disenrollment
		- The FEP does not need to make a good cause determination for missed activities because the participant did not notify them and provide a reason for the absence.
* Employability Plan – Goals
	+ Goal Steps completed as appropriate prior to ending the Employability Plan
	+ Auto populated End Dates
	+ Goals End Reasons - Disenrollment
	+ Enter Actual End Dates for each activity
	+ Activities Completion Reasons - Disenrollment
* Disenrolled from work programs on the Participant Summary page

# Quia Activities (FEP/RS)

## Final Assessment

* 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.

# CBT Completion (FEP/RS)

## W-2 Training Expectations

* Ensure learner completed the W-2 Training Expectations CBT as part of the Reinforcing W-2 in the Classroom curriculum. This is required for initial NWT completion.

# Next Steps (FEP/RS)

## Completion E-Mail Text

**Final (copy to ATL, NWT Lead, and Reg Staff)**

**Subject Line: Congratulations, Name (Agency)!**

Congratulations! You have completed Initial W-2 New Worker Training appropriate to your job function! It was a lot of work, but you made it!

#### Just a couple of final things:

PTT will continue to partner with you as you transition into your role.

* If you get started on the job and feel like you need a review of a topic, you may access your completed training at any time by searching for the course in the Learning Center catalog. You also can look it up on your transcript and access it.
* You also may request onsite support if you feel there is an area you need more help with. Simply have your ATL complete the onsite request form at <https://dcf.wisconsin.gov/w2-partnertraining/onsite-request>.

Remember training continues!

* Your Reinforcing W-2 in the Classroom curriculum still may be assigned. It includes the remaining courses that must be completed within the first 12 months of your hire date.

#### And finally…

Good luck in your new position! It has been a pleasure working with you, and I hope that you found New Worker Training prepared you to begin your new job function with the knowledge, skills, and tools you needed to be successful.

The Partner Training Team

## NWT Evaluation E-Mail (FEP Only)

1. Send NWT Evaluation email separate from completion email
	1. Set a delay send for the next business day.
	2. Send to workers who completed **FEP** training.
	3. Use text from NWT\_Evaluation\_Email