**Ongoing Processes 4**

**Trainer Guide**

#### Table of Contents

[CWW/WWP Entry Activities 3](#_Toc157149996)

[Email Guidelines 3](#_Toc157149997)

[New Employment Checklist 4](#_Toc157149998)

[Carmen 4](#_Toc157149999)

[Job Loss/Re-engagement Checklist 5](#_Toc157150000)

[Haylee and Luka 5](#_Toc157150001)

[Quia Activities 6](#_Toc157150002)

[W-2 Ongoing Processes Quiz 6](#_Toc157150003)

[Next Steps 6](#_Toc157150004)

[Email Text 6](#_Toc157150005)

# CWW/WWP Entry Activities

### Email Guidelines

#### Subject Lines - Choose one

* (Section Name: New Employment, Job Loss/Re-engagement) – (Case name) – 1st REVIEW (or 2nd, etc.)
  + Use this when edits are needed. Instruct the learner not to submit the EP yet.
* (Section Name: New Employment, Job Loss/Re-engagement) – (Case name) – Submit EP
  + Use this when all updates have been completed successfully. Instruct the learner to submit the EP and reply when they have submitted the EP.
* (Section Name: New Employment, Job Loss/Re-engagement) – (Case name) – COMPLETE
  + Use this when the EP has been submitted successfully.

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

* (Section Name) entries complete. You correctly entered all pages as instructed, entered comments, recorded an informal assessment, developed/updated the EP, and tracked assigned activities.
* Use the format above to list the Page Title and error.
  + Examples:

**Test Scores App** – Carmen has TABE scores that need to be recorded.

**PIN Comments** –be sure to include your rationale behind your placement change decision.

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

## New Employment Checklist

### Carmen

##### CWW

* PT job at the elementary school has ended
  + Ensure current month of income is ended and amount earned prorated
  + There should be one month with a $0 override
* New FT job at the chiropractic entered
  + Starts tomorrow, receives first paycheck in 3 weeks
  + Paid semi-monthly, 86 hrs/pay period at $15/hr
    - If learners calculate the hours/pay period incorrectly, remind them to multiply weekly hours by 2.15 to get hours/pay period for semi-monthly pay
  + Check the Employment Summary to ensure the first month of income is prorated with an override, then ongoing with the override removed
    - Ensure comments on the Employment page include how override amount was calculated and why
* Eligibility ran ignoring income and assets to allow W-2 to remain open
* Enter future dated placement change to CMF+ on the W-2 Placement page
  + Future dated to tomorrow
* Enter appropriate Case Comments

##### WWP

* Check transactions to ensure a new informal assessment was completed
* End Lunch Room Aide job at the local elementary school
* New employment added
  + Administrative Assistant at the chiropractic office, starts tomorrow
  + 40 hrs/wk, $15/hr, working M-F 7:30-4
  + Medical benefits and paid time off
  + Job duties: greeting visitors, answering phones, compiling mail, composing documents
* Update Education History page with completion of HSED
  + Remaining HSED test scores entered, completed last Friday, WI issued HSED (Language and Math should already be entered)
    - Science 150, passed
    - Social Studies 175, passed
    - Civics Pass
    - Health Pass
* W-2 Supportive Service Plan
  + All pages visited and plan submitted
  + Child Care Needs
    - Resources: YMCA and KinderCare
    - Short Term Plan of Action: Talk to mom about dropping off/picking up Lucia. Reach out to school about early drop off. Ask neighbor to watch Lucia until you get home.
    - Long Term Plan of Action: Enroll Lucia in a before/after school care program.
  + Transportation Needs
  + Resources: Local bank, Work’n Wheels, WETAP, JAL
  + Short Term Plan of Action: Figure out bus route. Talk to family/friends about getting a ride.
  + Long Term Plan of Action: Save up to buy a newer vehicle.
* EP (in progress)
  + Obtain HSED goal step completed for Long Term Career Goal
  + Other Program Goal of Obtain HSED successfully completed, new one added for Customer Service Technical Certificate
  + FT should be checked, PT should not be checked
  + Only assigned Job Retention activity
    - End date should match EP end date
  + Supportive Services included as appropriate
* PIN Comments documenting all changes
  + Comment Types: informal assessment, placement decision, employment, employability plan/activities, W-2 Plans

**\*\*After all updates are complete, tell learners to submit the EP, and remind them to reply once they have submitted it. \*\***

## Job Loss/Re-engagement Checklist

### Haylee and Luka

##### CWW

**Luka**

* Employment ended on the Employment page with appropriate overrides
* Placement changed to CSJ
* Case Comments entered explaining case changes

##### WWP

**Luka**

* Check transactions to ensure a new informal assessment was completed
* Work History page updated
* Participant Barriers page updated to include AODA
  + Participant Barrier page should not be completed
* Employability Plan updated
  + Review goals and goal steps
  + No employment included
  + Activities include AA meetings (PD activity code)
    - May or may not be assigned a full 40 hours, look to PIN Comments
  + Supportive services provided
* PIN Comments summarizing current situation
  + Employment change
  + Placement decision
  + Informal assessment
  + Barrier (confidential)
  + Employability Plan updates
    - If Luka is not assigned a full 40 hours in his CSJ placement, ensure the comments include a rationale for assigning less hours based on his current situation.

**Haylee**

* PIN Comments summarizing current situation
  + Placement change due to Luka’s job loss
  + Luka is still the placed parent due to being more employable

**\*\*After all updates are complete, tell learners to submit the EP, and remind them to reply once they have submitted it. \*\***

# Quia Activities

## W-2 Ongoing Processes Quiz

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

# Next Steps

1. Request the next curriculum.
   1. Request: W-2 NWT Completion (FEP)
2. Send the Email Text below.

## Email Text

#### Before Completion

**Subject Line: Next Steps: Completion**

You’re on the final stretch! You need one more curriculum to wrap up any loose ends and complete Initial TANF/W-2 New Worker Training. In this final curriculum, you will disenroll and close your cases as appropriate. You will complete a final assessment and score a minimum of 80%.

**You’ve come a long way…**