**Policy and Process**

**Trainer Guide**

#### Table of Contents

[Getting Started 3](#_Toc154730603)

[New Worker 3](#_Toc154730604)

[ATL 4](#_Toc154730605)

[Quia Activities 4](#_Toc154730606)

[Quia Process for New Worker Training 4](#_Toc154730607)

[Confidentiality Questions 5](#_Toc154730608)

[W-2 Policy and Process Quiz 6](#_Toc154730609)

[Next Steps 7](#_Toc154730610)

[Requesting the Next Curriculum 7](#_Toc154730611)

[E-mail Text 7](#_Toc154730612)

[Resource Specialist, FEP 7](#_Toc154730613)

# Getting Started

**IMPORTANT:**

Use the process below for all new workers. Refer to this section for future reference.

## New Worker

1. Receive e-mail notice of new worker from Reg Staff.
   1. E-mail includes:
      1. New worker’s name
      2. New worker’s email address
      3. Title of curriculum track being requested
2. Open New Worker Tracking Google Sheet.
   1. Add the New Worker to the appropriate agency tracking tab.
3. Send new worker the Welcome e-mail
   1. Send the content from “NWT\_Welcome\_Email”
      1. Attach the correct NWT Guide (RS or FEP)
      2. Attach InitialNWT\_TipsTricks
   2. Copy the ATL .
4. Create a folder in the NWT mailbox.
   1. Add curriculum track after trainee’s name (i.e., Smith, Sierra – FEP).
5. When necessary, follow up with an e-mail within a couple of days to:
   1. Ensure receipt and understanding of the training guide,
   2. Confirm WAMS and CARES IDs have been obtained,
   3. Provide contact information for [PTTTrainingSupp@wisconsin.gov](mailto:PTTTrainingSupp@wisconsin.gov).
   4. Explain process and use of Learning Center as needed
   5. Provide tips for completing distance learning
      1. Set aside time for training,
      2. Follow all instructions and processes step by step,
      3. Access and read all resources (policy, process, etc) cited,
      4. Schedule and take your time,
      5. Follow curriculum in the order it is assigned.

#### Tracking Progress

Track ongoing progress through e-mail folders, copying PTTTrainingSupp and ATL or supervisor if indicated, on each e-mail for the purpose of:

* Tracking completion of activities;
  + Update New Worker Tracking Google Sheet as modules and activities are completed by adding the date and your initials.
* Monitoring progress;
  + Determining lack of progress that may indicate too many job tasks or not enough time devoted to NWT,
  + Or quick progress that may indicate some activities are being missed/skipped.
* Knowing when to provide the next curriculum or next set of instructions to the new worker.

## ATL

Send ATL the ATL Welcome E-mail attaching to it the ATL Guide.

# Quia Activities

## Quia Process for New Worker Training

**IMPORTANT:**

Use the process outline below for all Quia activities in all subsequent curriculums.

1. Quizzes and Final Assessments
   1. A passing score of 80% or above is required for all quizzes and Final Assessments.
   2. Send an e-mail confirming the completion or status of the quiz or Final Assessment.
      1. **Quia Policy and Process Quiz**—Complete
      2. **Quia Policy and Process Quiz**—Retake
         1. NW must retake
      3. **Quia Policy and Process Quiz**—abandoned or in progress
         1. NW needs to complete
2. Quia Activities
   1. Review responses to questions
   2. Send email with feedback and recommended edits or confirming completion
      1. Quia W-2 Financial Eligibility Questions— Complete
      2. Quia Confidentiality Questions—1st Review
         1. This would indicate edits are needed and corrected responses should be resubmitted for review
      3. Quia Confidentiality Questions—abandoned or in progress
         1. This would indicate this activity has not been completed
3. Move the completed and/or graded (with passing score) Quia activity to the Archive.
4. Confirm that all Quia activities are complete in the current curriculum prior to assigning the next curriculum.
   1. If the new worker has not notified PTT of activities completed, go back through and confirm completion per steps above prior to requesting the next curriculum.
   2. If an activity has been Abandoned, notify new worker of the need to go back and complete the appropriate activity; providing activity link if necessary.

## Confidentiality Questions

**You have just completed an interview with your customer, Joe Hughes, and he has left the agency. A co-worker comes up to you and asks, “Was that Joe Hughes in your office? What was he doing here?”**

**How might this put customer confidentiality at risk?**

*Connecting a customer’s name with being an applicant or recipient to persons not involved in the administration of the programs is a breach of confidentiality. Even though the co-worker is working in the same program as you, s/he does not need to know this information.*

**What actions can you take to maintain confidentiality?**

*Decline to answer in a tactful a way. Respond with a simple statement that you cannot discuss it right then. Ask if the worker needs to know for a work related reason.*

**You are shopping at your local grocery store when you meet face to face with Joe Hughes in the frozen food section. Joe recognizes you and starts a conversation, “Hey. I was thinking about my application. Didn’t you say I could get Medicaid and FoodShare benefits?”**

**How might this put customer confidentiality at risk?**

*If you discuss a customer’s case in a public place, you have no control over who overhears your conversation. If anyone overhears the conversation, it would result in a breach of confidentiality.*

**What actions can you take to maintain confidentiality?**

*Be polite, but firm. Tell the person that you cannot discuss the any work related questions in public. Ask him or her to contact you when you are at your agency, when you will have the information available and you can be of more assistance. If s/he persists, you should repeat the statement that you are not allowed to discuss work outside of your office.*

**A friend of yours, who is currently laid off from his job, has learned that you have access to the unemployment computer files. He asks you to check his file and that of his buddy from work. You owe him a big favor, and he has reminded you of that.**

**How will you respond to this request?**

*Workers are not allowed to access the information available in computer match and query systems except for administration of the programs authorized. Respectfully decline this request. Accessing the information and giving the information to this person could jeopardize your job. Personal favors are not repaid with professional connections.*

**A customer has just brought you a statement from his AODA counselor verifying that he is currently enrolled in a treatment program. The customer was staggering when he walked. His speech was slow and slurred. His eyes were half closed, dull looking, and he appeared to stare at nothing in particular. The AODA counselor’s notes request that the customer be provided accommodations to participate in any work program activities during this period of treatment and states three very sensitive problems the customer is currently dealing with.**

**What will you write in PIN comments?**

*PIN comments should contain only objective information about the customer and a reference to see the confidential folder. Comments could include what was witnessed, and general notes about follow-up with the counselor’s recommendation. No subjective statements are acceptable. Cross-reference the confidential folder in ECF.*

## W-2 Policy and Process Quiz

* Review the score and the questions missed, and provide feedback.
  + A passing score is 80% or above.
  + A score lower than 80% requires the new worker to retake the quiz.
* Copy the ATL on your responses.

# Next Steps

## Requesting the Next Curriculum

1. Check the New Worker Training Tracking Google sheet to ensure new worker completed NWT Orientation prior to requesting the next curriculum
2. Request the correct curriculum based on job function/curriculum assigned.
   1. **Resource Specialist, FEP**
      1. Request: Client Registration
3. Contact new worker via e-mail to prep for next curriculum
   1. See “E-mail Text” below
   2. Include:
      1. Status
      2. What to expect in the next series of course
      3. A reminder to follow the Guide step by step
      4. A reminder to submit case numbers as instructed
4. Send new worker NWT Hub e-mail
   1. Include:
      1. text from NWT\_HUBEmail
      2. NWT Hub Flyer

## E-mail Text

### Resource Specialist, FEP

**Subject Line: Next Steps: Client Registration**

You have completed the "W-2 Policy and Process" curriculum. Congratulations!

Next, after you finish the Systems Introduction courses, you access CARES Worker Web (CWW), have your WAMS IDs available, to complete Client Registration. You also will access the W-2 Policy Manual and learn about what case management means in the W-2 program.

Take your time and follow all instructions. If you have any issues, contact [PTTTrainingSupp@wisconsin.gov](mailto:PTTTrainingSupp@wisconsin.gov).

Good luck!