**Review**

**Trainer Guide**

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# System Entry Activities

## Reviews

### Email Guidelines

#### Copy and Paste to Email

In this section, you completed an eligibility review. We are reviewing your system updates and entries and ensuring the review processes was completed.

#### Subject Lines - Choose one

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

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

* Review is complete. You correctly processed an eligibility review in CWW and updated WWP entries as needed. Comments are entered correctly in both CWW and WWP.
* Provide specific feedback on specific errors.
  + Example:

**Haylee Review** – Eligibility is pending due to not having confirmed eligibility.

## Review Checklist

Reviews can be checked in CWW in the query section of the menu, and then under confirmed assistance group summary. On the case summary page, the mode should be open and ongoing; if the case is still in review mode, it usually means that confirmation wasn’t done.

### **Carmen**

#### CWW

Complete a review using the Renewal driver in CWW.

* Check case summary to ensure review was completed and new review date generated
* Review Carmen’s assets
  + Savings Account - $75 – code BS
  + Checking Account - $350 – code BS
* CWW Comment type: “Renewal/SMRF”
  + Example Comment:  
    I completed a six month review today with Carmen. Her household still consists of her and her daughter, Lucia. Carmen continues to work at Clay Lamberton Elementary School part-time. I verified this with paystubs, and all her hours and wages are the same. She reports no other earned or unearned income. Carmen opened a savings account and still has her checking account. I verified both accounts with a bank statement. Carmen still owns a vehicle. The title/registration to verify ownership is already in ECF. I verified the current vehicle value with NADA. She reports no other assets. Lucia is still doing well in school. I verified this with school and attendance records. The W-2 case remains open and passing.

#### WWP

* PIN Comments, Comment types: Appointment – Other
  + Example Comment:  
    Carmen and I completed her six month review today. Carmen is still employed part-time at Clay Lamberton Elementary School. The job is going well and she is happy with her work. Employers have started calling her back for interviews, but she hasn’t received any other job offers. She continues to work with the Job Developer to prep for interviews. Carmen is making progress toward her HSED and hopes to take her remaining tests soon. She finished her Microsoft Word courses and moved on to the Excel courses. She says that they are helpful. We decided to leave her EP as is for now.

### Haylee

#### CWW

Complete a review using the Renewal driver in CWW.

* Check case summary to ensure review was completed and new review date generated
* Review Haylee’s assets
  + $130 prepaid debt card – code BS
  + No change to savings account
* Increase in child support income for Parker
  + $225/month – code DE
  + Ensure this was updated in the Details section
* Comments regarding review
  + Comment type in CWW “Renewal/SMRF”

#### WWP

**Luka**

* PIN Comments reflecting eligibility review appointment
  + Comment types: Appointment – Other

**Haylee**

* New Personal Goal entered on the EP
* PIN Comments reflecting eligibility review appointment
  + Comment type: Appointment – Other, Appointment – EP Review

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

# Next Steps

1. Request the next curriculum.
   1. Request: Ongoing Processes: Part Four
2. Send the Email Text below.

## Email Text

#### Before Completion

**Subject Line: Next Steps: Ongoing Processes: Part Four**

There is just one more section of Ongoing Processes to complete! In the next section you’ll work on ending employment and reengaging participants in activities.