Trainer's Notes

WWP Enrollment and Informal Assessment Processes for W-2

Purpose

To introduce the W-2 enrollment and informal assessment processes in the Wisconsin Work Programs (WWP) system.

Objectives

Upon completion of this course, you will be able to:
- Interpret elements of WWP's enrollment and informal assessment pages, e.g., referential data, field coloring indicators, buttons;
- Identify the flow of WWP's enrollment and informal assessment pages;
- Explain the importance of using the informal assessment data in your case management practices;
- Perform enrollment, informal assessment, and disenrollment functions in WWP.

Materials Needed
_____

Equipment
Laptop
Projector
Extension cord- w/ multiplugs

Trainer Materials/Resources
Trainers Notes
Participant Guide (a copy for the trainer to reference as needed, only)
Evaluations
Cardstock for Name Tents
Periodic Pause Activities (in appendix of TN)
Instructions for Computer lab: Access; guidelines;
Copies of relevant Operation Memos/Admin Memos
Sandra Case numbers for use for Trainer entries
WAMS ID for access to CWW and WWP training environments

Classroom/Learning Supplies
White Board Markers
Flip Chart Markers
Flip Chart paper- for parking lot items, questions on hold or than need follow up
Paper/plain printing paper for notes/ periodic pauses
Table top materials- markers, colored pencils, post-its, pens, fuzzy sticks, etc.

Notes:
- Remember one Sandra case must be created prior to and for each of your WWP training sessions. Information for creating a Sandra case is on **TN 103.**
- **CWW Training Environment (access from the Systems Gatepost page):** https://trn.cares.wisconsin.gov/
- **WWP Training Environment:** https://wwptrn.wisconsin.gov/

Suggested Pace

This course is a full 9-hour course. The following agenda is the suggested pace for each day.

Day 1

9:00 – 9:45: Introductions, Course Overview, Activity, Navigating in WWP Graphic
9:45 – 10:00: WWP Walkthrough – WWP Homepage, Participant Summary, Enrollment
10:00 – 10:30: Informal Assessment – Languages, Work History, Work Programs

10:30 – 10:45: Break

10:45 – 11:15: Informal Assessment – Education History, Post-Secondary Education, Military Service
11:15 – 11:20: Periodic Pause
11:20 – 11:50: Housing, Transportation, Legal Issues

11:50 – 12:50: Lunch

12:50 – 1:25: Informal Assessment – Participant Barriers, Child & Youth Supports
1:25 – 1:30: Periodic Pause
1:30 – 1:55: Family Barriers, Non-Custodial Parents, NCP Referral
1:55 – 2:00: Periodic Pause
2:00 – 2:10: Informal Assessment Summary, Tasks to complete
2:10 – 2:20: Guided Entry – Brenda – CWW Entries

2:20 – 2:30: Break

2:30 – 3:45: Guided Entry – Brenda – WWP Entries
3:45 – 4:00: Day 1 Wrap Up

Day 2

9:00 - 9:10: Start of Day 2
9:10 – 9:30: WWP Apps
9:30 – 9:35: Periodic Pause
9:35 – 10:35: Independent Entry – Janae

10:35 – 10:50: Break

10:50 – 11:10: Other WWP Notes
11:10 – 11:15: Periodic Pause
11:15 – 11:30: Implementation Notes
11:30 – 12:00: Activity and Closing

Welcome to Wisconsin Work Programs (WWP)

Introduce trainers – cover housekeeping topics like restrooms, and so on.

Introduce the class note taker and their role to capture questions that we are unable to answer and give that information to the WWP Project Leads. Answers will be available on a Question and Answer (Q &A) website following completion of the training sessions.

📄 **PG Page 4**

You've heard about WWP for months, and now it is almost here. This classroom training is part two of your training to prepare for implementation of Phase One of WWP-Enrollment and Informal Assessment.

You completed the Setting the Stage video series and the online prerequisite before attending today.

This training builds on that knowledge.

This training provides you the opportunity practice WWP enrollment and informal assessment entries.

🖹 **PG Page 5**

<div align="right">**Class Overview**</div>

During this class you will:

- Review what you learned about WWP in the prerequisites – not by giving you a quiz, but by probing your memory a little before we begin working in WWP.

- Make referrals to and enroll participants in WWP –participants **must** be referred and enrolled before we enter an informal assessment. Enrollment is a little different than in CARES Mainframe.

- See a walkthrough of the informal assessment pages in WWP – we'll spend a lot of time on this today. There are multiple pages to cover, plus additional places to enter details. We'll show them to you first before you log in to the system.

- Complete an enrollment and informal assessment along with your trainers in the WWP training environment.

- Complete another enrollment and informal assessment on your own. We give you the information about the participant, and you make the entries yourself. We are here to help you if you have questions and will check your results to see if you entered all the information in the right places.

- Learn about other functions, such as:
    o subsequent informal assessments. You enter new ones in class – how are assessments after that handled?
    o updating information – when to do it and how to do it,
    o viewing WWP history,
    o transferring participants to other FEPs or other offices,
    o disenrolling participants,
    o co-enrolled participants – this is something handled in a new way. W-2 participants also may be enrolled in other programs in WWP simultaneously (like Children First), and
    o the migration of information from CARES mainframe to WWP – there are processes and timelines we all need to be aware of.

- Leave prepared you for the after-class W-2 informal assessment practice scenarios. You will be given three additional scenarios to practice on your own. One is making updates to a participant's informal assessment information you created in class. The other two are new assessments for new participants. We'll give you those directions before you leave.

What do you know about WWP? - Activity

Purpose: Review WWP knowledge prerequisites, highlight positive aspects of WWP, and compile lists of challenges and questions to address in class or find answers.
.
Materials: Answer sheet in PG, Flip charts

Estimated Length: 25 minutes

Directions to Trainer: This is a 1-2-4-All activity. Give learners 5-7 minutes to answer the questions in the PG. Next, have learners find a partner and give them 3 minutes to share their responses. Then, have pairs find another pair and give them three more minutes to share. In the group of 4 have them designate a spokesperson from their group to share their groups responses when asked.

Go at least two rounds for each question before moving to the next one. Record responses on flip chart paper or in the Word document projected on the screen. Note takers can gather the information for us to compile and submit.

Do not get bogged down in the challenges but acknowledge that they are real. Assure learners that we will talk about those challenges as they come up during the training.

Pay attention to the questions listed. If they are easy ones, you may answer them right away. When applicable, tell learners that a question will be answered later in the class. If we don't have an answer for a question, remind learners that we have a note taker in the room who will record the questions and pass them along.

📄 **PG Page 6**

Trainer Instructions to Learners: Let's spend a few minutes discussing what you know about WWP so far as well as concerns and questions you have. To start, you have 5-7 minutes to write your answers to the questions on page 6 of your participant guide.

1. Based on what you already have learned, list three things you know for sure about WWP:

2. What are you most excited about with WWP?

3. What do you think will be the biggest challenge with WWP?

4. What is one key advantage of the new system?

5. What question(s) about WWP do you want answered during this class?

Now, find a partner and share your responses with each other. You have five minutes for this step.

Next, find another pair (form groups of four) to compare notes. You have five minutes to identify things you have in common.

Lastly, let's go around to each group to capture some of your responses to these questions on the flip chart paper to see if you are in a similar place in your knowledge, expectations and anticipation of WWP.

Navigating in WWP Graphic

📄 **PG Page 7**

Do you remember seeing this Infographic? It was part of the training you completed prior to this class. When we go into WWP, you'll see how these elements function.

- Colors – remember each color tells you about a data field. These colors guide us in our walkthrough of an informal assessment.

- Buttons – WWP is a web-based system, navigation and functions happen primarily with buttons. You'll see these buttons in action when we do our informal assessment walkthrough.

- Function Keys – if you are more comfortable using keyboard shortcuts rather than a mouse, there are some navigation keys you can use.

- Icons – take you to specific lists and details in WWP. We'll show you how all of them work.

We have reviewed what was covered in the prerequisites.

Now, we will walk through the informal assessment driver flow in WWP. I'll be explaining each page while my colleague makes the computer entries.

Your participant guide is designed to be your workbook, a place for you to capture notes and aha's that will help you working in WWP. A screen shot of each page of the informal assessment is followed by its purpose and one of more of the following as appropriate for each page:
- Case Management Benefits
- Additional Resources
- Space for you to take notes

Ask if there are any questions before we begin our trainer walkthrough of WWP.

Tell the learners If there are questions that that will be answered/covered later in the training, ask the learner to jot it down on a post it and when we get to that section we can check in with them to be sure it was covered. If answer can be provided quickly with no delay in the flow of the class, go ahead and answer it.

Let's begin in your PG page 8.

WWP Walkthrough

📄 **PG Page 8**

As we get started, my co-trainer will log into the WWP training environment to show us the WWP Homepage.

WWP Training Environment: https://wwptrn.wisconsin.gov/
Logon to WWP using your WAMS ID

🖥️ **Log in** to WWP Training and show the **WWP Homepage** on the projector.

The **WWP Homepage** is the default page when you log in to WWP. It provides a list of recently accessed participants, a list of participants assigned to the worker, and a list of participants referred or transferred to all Work Program (WP) offices in the contract agency. There is also a PIN search function to look up participants by PIN.

WWP Homepage Walkthrough:

When you log in, the default tab displayed is **Recently Accessed PINs**.

🖥️ **Click** on the **Participants by Worker** tab.

The **Participants by Worker** tab is a listing of all PINs assigned to the worker logged in to WWP. You can use the **Search** field to search by first or last name as well as PIN.

🖥️ **Click** the **Worker** drop-down in the upper right-hand corner of the page.

You also can select a different worker name for the list. It defaults to the user who is logged in to WWP.

🖥️ **Click** on the **Referrals & Transfers** tab.

It may take a few moments for the list to populate. The **Referrals & Transfers** tab displays a list of all participants referred to or transferred to your contract agency.

The Search functionality also works the same way on this list as on the previous one.

The **Refresh Information** button refreshes the page from CWW to pick up any new referrals since the page was first accessed.

🖥️ **Click** on the **PIN Search** tab.

The **PIN Search** tab allows you to search the system for a known 10-digit PIN, regardless of assigned office or worker.

⌨   *Trainer Demo Entries:*

- **Click** the **Participants by Worker** tab.
- **Enter** the last name of Sandra from your referred case in CWW Training in the **Search** field.
- **Click** to select your Sandra from the list.
- **Click** on the worker navigation toolbar. Point out the Help Center button.
- **Click** the ribbon again to remove it

Participant Summary – prior to enrollment

📄 **PG Page 9**

Participant Summary displays the participant's basic demographic information from CWW. It shows information related to W-2 and other work programs including:
- WWP enrollment information,
- demographic information,
- contact information,
- W-2 participation and eligibility,
- TMJ/TJ/CF program information,
- Learnfare information,
- other programs of assistance the participant is open for, and
- FSET enrollment status.

Additionally, it displays programs the participant is enrolled in or has been disenrolled from in WWP.

You enroll a participant from this page.

Walkthrough

Point out the **Enroll Participant** button on the upper left side of the page. This button is available only for a participant who is referred to, but not enrolled in a program.

Also note the referential data displayed on the page. Referential data is brought over from CWW. A limited amount pf data is shown unless that participant is enrolled in an office in the worker's contract agency (BOS) or in any Milwaukee agency (for Milwaukee staff). For Sandra, you can see her Basic Information, WWP Enrollment Information (she is Referred at this point), demographics and contact information.

🖥️   **Scroll** down to show her W-2 Participation and W-2 Eligibility information. You can see she is not open for any other programs, is not enrolled in FSET, and is cooperating with Child Support.

Note the **Refresh Information** button at the bottom of the page. If you update participant information in CWW, use this button to refresh the page and show the updated data.

Trainer Demo Entries

- **Click** the **Enroll Participant** button.
- A dialog box opens for enrolling Sandra. **Note** that if the **Program** field does not default to W-2, select it from the drop-down. The default FEP is the worker assigned on the **W-2 Request** page in CWW. The **FEP ID** field is a drop-down and shows all workers from the office that the participant could be assigned to. Learnfare enrollment also happens in WWP. If you choose that program, the system will ask for a Learnfare Case Manager ID instead of a FEP ID.
- WWP displays a message indicating the participant is eligible for enrollment. If the participant is not eligible, an error message displays.
- **Click** the **Enroll** button to enroll Sandra.
- When the dialog box closes, the **Participant Summary** page displays again.

Participant Summary – after enrollment

📄 **PG Page 10**

From this page, workers can disenroll a participant from the W-2 program, reassign the participant to another worker, or transfer the participant to a different office within a contract agency (BOS) or to a different Milwaukee agency (Milwaukee only).

Walkthrough

Point out the following new buttons available at the top of the page:

- **Disenroll Participant** is now in the upper left of the page. Use this button to disenroll a participant.
- **Reassign Worker** is on the right side. Use this button to assign the participant to another FEP.
- **Office Transfer** is on the far right side. You can transfer the participant from one office to another when appropriate. We'll talk more about that later in this class.

Case Management Navigation Toolbar

📄 **PG Page 11**

From the **Participant Summary** page, you can access the informal assessment from the Case Management navigation toolbar. You can access this toolbar from anywhere in WWP if you are working with a participant PIN.

Walkthrough

🖥️ **Click** on **Case Management** to open the toolbar.

Review the buttons available:
- **Participant Summary** returns you to this page.
- **Request Assistance** and **Client Registration** are used by other work programs that do not use CWW (e.g. Children First, Transitional Jobs, Transform Milwaukee Jobs).
- **Informal Assessment** accesses the informal assessment pages of WWP.
- **Time Limit** is used for tracking and updating W-2 time limit information.

Now, let's begin an informal assessment with Sandra.

⌨️ *Trainer Demo Entries*

- **Click** on the **Informal Assessment** button.

Informal Assessment

📄 **PG Page 12**

For a participant who has not had an informal assessment completed, this page begins the driver flow in WWP.

If a participant already has had assessment data entered in WWP, that information is displayed on this page. We'll see how that looks later in this training.

Walkthrough

Since there is no informal assessment data entered for Sandra, there is only one button available: the **New Assessment** button in the upper left of the page. Clicking on this button begins Sandra's initial informal assessment.

⌨ *Trainer Demo Entries*

- **Click** on the **New Assessment** button.

Languages

📄 **PG Pages 14-15**

Note that your PG has information about the **Languages** page in WWP on two pages. You'll see that the screen shot is on page 14 and the purpose, case management benefits, additional resources and note taking space are on page 15. This is how your PG is set up for each of the informal assessment pages.

The case management benefits should help you think about ways the information being collected can be used in your case management with the participant. The additional resources are links to websites related to the information collected on each page of the informal assessment. Remember, WWP is a great tool for informal assessment, but it is not the only tool you have available.

In the **Appendix** of your PG pages 81-83 we have compiled all the additional resources mentioned for each informal assessment page for easy reference when you are doing case management.

📄 **PG Pages 14-15**

If you look at the top of the **Languages** page here, on the screen or on the screen shot in your participant guide, you can see that each page in the Informal Assessment driver flow includes a brief statement. You can use these statements as a conversation starter to explain the information you want to gather.

The purpose of the **Languages** page is to collect information on languages the participant reads, writes, and speaks.

Completing this page will assist you in identifying the need for an interpreter/translator or other language services. You will also identify bilingual participants. They have a very marketable employment skill.

Ask learners if they can think of any other benefits of completing this page. There is space in the PG for them to list additional case management benefits.

Walkthrough

The first question asks what language the participant uses at home and if the language is read, written, and spoken. Note the purple color on the left side of the boxes that indicates a required entry.

🖥️   **Click** to select ARABIC from the first drop-down list.

If you choose a language other than English from the drop-down list, an additional required question about English skills appears. Farther down the page, a question about the need for an interpreter also appears.

The next question is about any other languages the participant knows. You can enter additional languages using the **+ Add Language** button.

Note the additional resource shown in the PG – a link to an online directory of Adult Basic Education and ESL resources available in Wisconsin.

Point out the **Notes** field at the bottom of the page**.** The **Notes** field is a place for you to document any entry on this page that is not adequately explained, or additional information gathered during the conversation that is pertinent. For example, you could explain why someone speaks English, but doesn't read or write it. **Remind** learners **Notes** are not linked to Case Comments in CWW or CARES Mainframe.

Also remind them about the F-Key/shortcuts at the bottom of the page. **Refer** to the infographic poster in the room (also in their participant guide) that lists each key's function.

Let's begin the informal assessment entries for Sandra on this page.

⌨   *Trainer Demo Entries*

- **Change** the answer for "What language do you use at home?" to ENGLISH.
- **Indicate** that it is Read, Written, and Spoken.
- Note that the purple highlights (indicating mandatory fields) in those boxes changed to yellow. Yellow indicates unsaved information.
- **Click** Save.
- Note that the yellow highlights are now purple again. Also note that there is a green check-mark next to the **Languages** page in the navigation menu. That indicates the page has been completed successfully and saved.
- **Click** + Continue to go to the next page.

Work History

📄 **PG Pages 16-17**

The purpose of this page is to collect information on the participant's current and past employment, subsidized employment, and volunteer work.

Ask learners what the case management benefits of collecting this information are. There are several listed in the PG including:
- Employment history is a critical part of informal assessment and can be used in building a resume.
- Past employment gives an indication of transferrable skills.
- Previous experience in an industry may lead to future opportunities in the same field or a similar one.
- Patterns of employment may indicate strengths or the potential for barriers that must be addressed.
- Current employment is a foundation for skill building and advancement.

Walkthrough

The first question on the page is about employment status**.** There are three choices – full-time, part-time, or unemployed.

If you choose full-time or part-time, the page requires you to gather additional information about the current job before it is marked as "complete."

💻   **Click** to select Part-Time for the "What is your employment status?" question. **Note** which fields are now required (purple). **Do this** for Full-Time and Unemployed as well and **note** how the required information changes.

If you choose Part-Time or Unemployed, a question appears about what is keeping the participant from working full-time. You can select multiple reasons in the drop-down. If you select PERSONAL CHOICE and/or OTHER as reasons, **Details** must be entered before the page is considered complete.

A follow-up question appears about past employment or volunteer work. A response of Yes to this question requires work history entries before the page is considered complete.

If there already was work history in the system for the participant, it shows on the page. To enter details on past or current employment, click on the **+ Add Work History** button.

💻   **Click** the **+ Add Work History** button.

Work History - Details

📄 **PG Pages 18-19**

Enter each job on its own page.

🖥️   **Click** the drop-down for **Job Type** and show the types of jobs that can be chosen. Note that there is a choice for STAFFING AGENCY. There are also several job types that start with TEMP. These are for the Trial Employment Matching Program, not Temp agency jobs.

🖥️   **Click** the check box for **Currently Employed**. Note that the **End Date** field is now greyed out. Scroll down to show the other fields on the page.

You enter information on hours and pay at the bottom of the page.

Point out the **Contacts** section on the page. Several informal assessment pages let you record information for a contact by clicking the Add (plus sign) button. In this instance, it could be contact information for an Employer. A contact created for a specific page shows on that page. You can add multiple contacts or access a master list of all the contacts created for a participant by clicking on the Address Book icon in any **Contacts** section or through the **Contacts** app in the **Case Management** navigation toolbar. Contacts may include Child Welfare Workers, Employers, Legal Representatives/Advocates, Treatment/Assessment providers, and so on. We'll see the **Contacts** section on several other pages as we continue through the informal assessment.

🖥️   **Click** the X in the upper left-hand corner to close the detailed view.

There is no set rule about how much work history to enter. The intent is to capture a history of work that may be useful in building a resume or showing patterns that may be occurring with employment. Some individuals may have several jobs in the past year alone, so capturing a shorter time may serve to illustrate the pattern. Other individuals with a more stable work history may have had only one or two jobs over several years. For that person, you may want to capture jobs from farther back in time if they are relevant to current circumstances.

As with other pages, you can enter **Notes** in the field at the bottom of the page.

Note the **Additional Resources** provided for Work History in the PG – Links to the Job Center of Wisconsin website and O*Net.

Let's enter some work history for Sandra.

⌧ *Trainer Demo Entries*

Work History Page:

- For the *"What is your employment status?"* question at the top of the page, **Select** Unemployed.
- For the *"What is keeping you from working full-time?"* question, **Select** LOOKING FOR WORK/NO WORK AVAILABLE from the drop-down.
- In the **Details** field, **Enter** *Nobody ever calls me back for an interview*.
- For the *"Have you ever been employed?"* question, **Answer** Yes.
- **Click** the **+ Add Work History** button.

Work History Details:

- For the **Job Type, Select** UNSUBSIDIZED from the drop-down**.**
- **Enter** a **Begin Date** of 03/01/2016 and an **End Date** of 04/03/2017**.** All four digits of the year **must** be entered.
- For the **Position, Enter** *Dishwasher* and for the **Company Enter** *Moundview Family Restaurant.* In the production environment, you can enter the FEIN here as well.
- In the **Location, Start Typing** BELMONT and wait for the system to prompt you with BELMONT, WI, USA. WWP uses lookup tools from Google to find matches in fields like this. **Click** on BELMONT, WI, USA to populate it in the box. You **must** select a valid City and State from the results or the system does not let you continue.

- Note that the **Save & Exit** button is showing at the bottom of the screen, but we are not done entering information yet. We must scroll down the page to see the remaining entries.

- **Enter** the **Street Address** (102 W Mound View Ave) and note that the **Zip** populates automatically (53510).

- In the **Job Duties** field, **enter** WASHING DISHES, CLEANING STATION AND PREP AREAS, TAKING OUT GARBAGE, MOPPING FLOORS. **Note** that any words indicated as potentially misspelled are being checked by your web browser and not by WWP.
- In the **Reason for Leaving** field, **select** FIRED from the drop-down. **Enter** *Lost job for poor attendance* in the **Details** field.

- In the **Wage/Hours Information**, **select** HOURLY WAGE from the **Pay Types** drop-down. **Pay Type** is a multi-select drop-down. More than one type can be selected as appropriate.
- **Enter** 20 as her **Average Weekly Hours.**
- **Enter** $7.50 as her **Beginning Rate** and **select** per HOUR from the drop-down.

- **Note:** Only one rate can be entered, even if multiple pay types were selected. If a participant has more than one pay type, such as regular pay and tips, you need to calculate and enter a total weekly amount. Use the **Notes** field to explain your weekly calculation.

- In the **Ending Rate** field, **check** the box to indicate that there was No Change in her wage.
- **Click** the **Save & Exit** button and note/correct any errors on the page.
- For the purposes of this walkthrough, we are entering only one job, but in the real world, you **must** collect a complete work history for the participant.

  Return to the Work History Page:
- The job displays on the **Work History** page. Clicking on the Work History button (briefcase icon) opens a new browser tab showing the work history list. This occurs any time you access a list page from within an informal assessment page. Be sure to close the new tab when you are finished looking at the list. This ensures you don't lose any changes.
- Clicking on the **Edit Entry** button (pencil icon) lets you edit information about the job. Clicking on the Delete button (trash can icon) lets you delete the job. **Click** on the **Delete** button to show that the system wants to know a reason for deleting the job. **Click** away from the button and the reasons go away.
- **Click** the **Save** button at the bottom of the page. **Note and correct** any errors that are highlighted on the page. **Check** that the green checkmark is next to the page name in the navigation menu.

- **Ask** learners if there are any questions on the page before continuing.
- **Click + Continue** to go on to the next page.

Work Programs

📄 **PG Pages 20-21**

This page collects information on other work programs (e.g., FSET, DVR, WIOA, etc.) that the participant is currently involved in, has participated in previously, or will be working with in the future.

Ask learners how collecting information on other work programs can benefit case management.

Suggested benefits listed in the PG include:
- The participant may have acquired skills or experience in past work program participation that may benefit current employability.
- Any other work program a participant is currently involved in is an opportunity for collaborative case management and the combining of resources.
- Current employability planning can incorporate preparation for future participation in other programs.

Walkthrough

The only question initially shown on the page is *"Have you, are you currently, or will you be involved in any other work programs?"* The page requires additional entries if the answer is Yes.

    ⌨   **Click** to select Yes.

A Yes response requires you to enter information about the participation in another work program. There is a drop-down to select the **Status** of PAST, CURRENT, or WAITLIST. If you select PAST, the system requires estimated **Start** and **End** dates. If you select CURRENT, only a **Start** date is required.

Another drop-down is for selecting the **Name** of the program.

    ⌨   **Click** the **Name** drop-down to show the available selections.

The **Location** field is required. It works like the Location field we saw on the **Work History** page, using Google data to look up matches based on what you type.

Use the **Details** field to explain details of the participation. The **Details** field requires an entry if OTHER is selected as the Work Program **Name**.

Use the **Contacts** section to enter contact information for a Case Manager or staff person from the other work program. We saw one of those on the **Work History** page as well.

You can enter information for any additional programs by clicking the **+ Add Item** button.

As with other pages, you can enter **Notes** in the field at the bottom of the page.

Let's say Sandra had been involved with a WIOA youth program in the past.

    ⌨   *Trainer Demo Entries*

- With only the Yes answer selected for the initial question on the page, click Save**.** Note that the system highlights missing required information in red (**Status, Name,** and **Location**). Also note the error message at the top of the page and the red exclamation point shown in the navigation menu. Scroll down (if necessary) to show the option to click Continue with Errors. An assessment cannot be considered complete with unresolved errors. Although you can continue to other pages and make other entries, the error on this page remains.

- In the **Status** drop-down, **Select** PAST.
- For the **Name** drop-down**, Select** WIOA YOUTH.
- **Enter** a **Start** date of 06/2016 and an **End** date of 08/2016.

As you are making entries, **note** that the list of errors at the top of the page is updating itself.

- In the **Location** field, **Enter** PLATTEVILLE and **Select** the match for PLATTEVILLE, WI, USA.
- In the **Details** field, **enter** *Sandra was in a Summer Youth Employment Skills training program*.
- **Click** the **Save** button. **Note and correct** any other errors on the page. **Check** that the green checkmark is next to the page name in the navigation menu.
- **Ask** learners if there are any questions on the page before continuing.
- **Click + Continue** to go on to the next page.

Education History

📄 PG Pages 22-23

This page collects information about the participant's high school graduation status, or about test scores if the participant is working toward a GED/HSED.

The information on this page is a critical part of the Educational Needs Assessment required by W-2 Policy (W-2 Manual 5.3.1). **Ask** if there are other reasons that education information benefit case management.

Benefits listed in the PG include:
- information about education history and test levels drives assignment of education activities
- this information also impacts employment and training opportunities.

Walkthrough

The page begins with the question "What is your high school graduation status?" There are four choices – Diploma, GED, HSED, or None. Selecting None indicates the participant did not graduate.

🖥️   **Click** the Diploma selection.

Selecting Diploma requires information about the **Last School Attended (K-12).** The **Location** field is another Google lookup field where you select the match that comes up from what you type.

After you enter the **Location**, the **School Name** is required. It also uses Google's lookup tools to find the school system name based on what you type. For this field, you are not forced to pick the suggestion – you can continue with a name that does not match any suggestions.

Last Year Attended is required. If the participant is not sure, use the best estimate.

⌨   **Click** the GED selection.

Selecting GED or HSED requires the **Last School Attended** information along with the **Last Grade Completed**, the **State Issued** for the GED/HSED in a drop-down, and the **Year Awarded.** If the exact year is not known, use the best estimate.

⌨   **Click** the None selection.

If the participant has not graduated high school and does not have a GED/HSED, a question, "Have you ever attended school?" appears. If you answer Yes, the **Last School Attended** section **must** be entered.

There is also a question *"Are you working towards a GED or HSED?"* Explain a Yes answer in the **Notes** field at the bottom of the page.

WWP tracks GED and HSED Test Scores and they can be entered from this page.

⌨   In the **Test Scores** section, **Click** the **add** (+) button.

Track test scores from GED/HSED tests here. **Date Taken** is a required entry**.** After that, enter details of the **Score** on individual tests and the **Pass/Fail** status. There is a **Details** field to explain anything beyond the scores that is important about this set of tests. After saving the data, it displays on the **Education History** page.

⌨   **Click** Cancel to close the **Test Scores** box.

WWP Also tracks other types of education level tests (e.g., BEST, TABE), but they are not entered on this page. Enter those scores directly using the **Test Scores** app under the Case Management navigation toolbar. We'll talk more about that later.

As with other pages, you can enter **Notes** in the field at the bottom of the page to explain anything not fully covered in other entries on the page.

Now, we'll put some information in the system for Sandra's education.

Trainer Demo Entries

- For the High School Graduation Status question, **click** on None.
- For the *"Have you ever attended school?"* question, **Select** YES
- In the **Location** field of the **Last School Attended** section, **Type** BELMONT. **Select** BELMONT, WI, USA from the suggested cities.

- In the **School Name** field, **Type** BELMONT. **Note** that BELMONT COMMUNITY SCHOOL DISTRICT is the suggested result, but we are looking for Belmont High School. We can enter other names; the suggestion is for convenience. Finish typing BELMONT HIGH SCHOOL in the field and move on to the next entry.

- For the **Last Year Attended, Enter** 2012**.**
- From the **Last Grade Completed** drop-down, **Select** 11TH GRADE**.**
- **Indicate** that she is not "Currently Enrolled?"
- **Indicate** she is not "Working towards a GED or HSED?" We will demonstrate entering test score information later.

- **Click** the **Save** button. **Note and correct** any errors on the page. **Check** that the green checkmark is next to the page name in the navigation menu.
- **Ask** learners if there are any questions on the page before continuing.
- **Click + Continue** to go on to the next page.

Post-Secondary Education

📄 PG Pages 24-25

This page collects information about post-secondary education, licenses, and certifications that the participant has or is working on.

Ask learners what the benefits are of assessing post-secondary education.

Benefits listed in the PG include:
- Post-secondary education makes a participant more employable and significantly increases lifetime earnings potential.
- If a participant is in the process of getting a degree or certification, completion may become part of the employability plan.
- Licenses and certifications are important assets when marketing a participant to employers.

The first question on this page asks, *"Have you attended, or are you currently attending a college or university?"*

⌨   **Click** to select Yes.

Answering Yes requires information in the **Colleges & Universities** section. The **Location** field uses the Google lookup tool as on previous pages. After entering the **Location**, you **must** enter the **Name** of the school. Again, Google lookup tools provide suggested names of schools based on the city you entered. You do not need to select one of the suggested schools. You can type the school name in directly. Next, indicate if the participant **Graduated** from that school.

The next set of fields asks for information on how much post-secondary work the participant completed at the school and when it was completed. Either enter the **Last Year Attended** or use the check box to indicate the participant is Currently Attending that school. Fields for how many **Semesters** have been completed, how many **Credits** have been earned, and any further **Details** follow. Enter this information if it is available and is relevant to the participant's current or future activities.

The **+ Add School** button lets you enter more schools the participant has attended.

Below the school information is a question that asks, *"Do you have any degrees?"* This appears only if the participant answers Yes to the previous question.

⌨   **Click** to select Yes for "*Do you have any degrees?"*

The system requires the following entries about **Degrees:**
- **Degree Name,** which is a free-text field
- **Degree Level** (drop-down)
- **College** (also a drop-down, but the choices are the school names entered in the **Colleges & Universities** section of the page)
- **Year Attained**

You can enter additional degrees, if applicable, by clicking the **+ Add Degree** button.

⌨   **Click** to select No for *"Do you have any degrees?"*, and Yes for *"Do you have or are you working towards any licenses & certificates?"*

Like the "Degrees" question, a Yes answer to the question about "Licenses or Certificates" requires additional entries.

The first drop-down is to select the **Type** – either LICENSE or CERTIFICATE. The **Name** of the license or certificate is required – this is a free-text field. There is a drop-down to indicate if it is **Valid in WI,** with possible responses of YES, NO, or UNKNOWN. You **must** enter the **Issuer** of the license or certificate in the free-text field.

Below that required information are date fields. The **Date Attained** field is for a month and year. It is not entered if you checked the **In Progress** box. There is also an **Expiration Date** field. Checking the No Expiration box does not require a date entry.

You can enter additional licenses or certificates by clicking on the **+ Add Item** button.

🖥   **Click** to select No for "Licenses & Certificates" and No for the first question about "Attended or currently attending college."

Once again, a **Notes** field is at the bottom of the page for additional information.

Sandra has never been to college and has no degrees, licenses or certifications, so her entries on this page will be simple.

⌨   *Trainer Demo Entries*

- For *"Have you attended, or are you currently attending college or university?"* **Answer** No
- **Indicate** that Sandra does not have any "Licenses or Certificates."

- **Click** the **Save** button. **Note and correct** any errors on the page. **Check** that the green checkmark is next to the page name in the navigation menu.
- **Ask** learners if there are any questions on the page before continuing.
- **Click + Continue** to go on to the next page.

Military Service

📄 **PG Pages 26-27**

The purpose of this page is to collect information on the participant's military service and training.

There are benefits to getting more than just a yes or no answer to the question about military service. **Ask** learners what benefits they can think of.

Benefits listed in the PG include:
• Knowledge of a participant's status as a veteran can help you make referrals to additional resources or opportunities (such as a local Veterans' Service Officer).
• Any skills learned during military service can be connected to civilian occupations.
• Skills learned also may be a foundation for additional education and training activities.

Walkthrough

The question *"Do you have any military training?"* is all you see when you first access the page. If the participant ever served in the military, answer Yes. More data fields open to collect further information. If the answer to the question is No, that is all you need to do to complete the page.

💻   **Answer** Yes to the question.

This displays the **Military History** section. Information collected about the participant's military history include: **Branch** of service (drop-down), **Rank** (drop-down), and **Rate or MOS** (free text field).

Rank represents the pay grade and level of responsibility the participant reached in his or her respective service branch. **Rate or MOS** (also known as "rating" and "Military Occupation Specialty") is the equivalent of the participant's specific job title in the military. A participant who has served in the military will know what these terms mean. If you want to learn more about them, you can look on the internet (military.com is a good resource in the Additional Resources section of your participant guide. To learn more about army ranks for example, search the site for "army ranks.").

Enlistment Date and **Discharge Date** can be entered. There is a drop-down for the **Discharge Type**, which is a required entry. Discharge types (Honorable, General, Other) can have an impact on a participant's ability to become employed and can affect other benefits or programs that a veteran might be eligible for. The link listed in Additional Resources for Military.com is good for looking up details on the various discharge types.

Skills and Training is a text entry field. It is a place for you to document the skills the participant acquired during his or her time of service.

A question about benefits based on military service displays at the bottom of the **Military History** section. Selecting Yes requires an entry in the **Details** field.

As with other pages, you can enter **Notes** in the field at the bottom of the page.

Since Sandra was never in the military, this page is also easy to complete.

                                        💻   ***Trainer Demo Entries***

- **Change** the answer for "Military Training" to No.
- **Let** learners know that in a later scenario, we will be entering information on this page.
- **Click + Continue** to go on to the next page.

Housing

📄 **PG Pages 28-29**

The purpose of this page is to collect information on the participant's current and past housing situations.

Ask learners what benefits are of assessing the participant's housing situation.

Benefits listed in the PG include:
- For a parent to participate in work or work activities, stable housing is essential.
- Research has noted that patterns of housing difficulties in the past may be an indicator of larger needs that may impact employability and participation.
- This is an opportunity to connect participants with available housing resources if needed.

Walkthrough

Point out the CWW icon and the **Current Address** section. This is taken from the **General Case Information** page in CWW.

In the **Current Housing** section, the drop-down contains a list of housing situations. There are also fields for entering the date the family began living in this housing situation and the monthly cost. The arrow button allows you to move the displayed information to the **Housing History** section and enter new current housing information.

There is a question, *"Are you at risk of being evicted or forced to move?"* Answering Yes to this question requires entry of **Details** to explain the situation.

Housing History shows any past housing situations entered in WWP. For new assessments that show no history, entering up to two years of past housing situations allows you to discover any patterns. The **+ Add Housing Situation** button allows you to make these entries.

A Yes response to either of the two remaining questions ("*Are you at risk of having a utility disconnected?"* or *"Does your current housing situation make it hard to work or participate in work activities?"*) requires **Details** explaining the circumstances.

Review the different action items under **Action Needed** that are possible for this page. Any items selected here are added to the **Action Needed** list. If you click on the **Add** button, you create an action item. Using the **Edit Entry** button, you can add more detail about the item. If you create an item in error, it must be deleted using the **Delete** button.

Let's enter Housing information for Sandra.

⌨ ***Trainer Demo Entries***

- From the **Housing Situation** drop down, **Select** RENT (SUBSIDIZED). Enter a **Begin Date** of 03/2018. The **Monthly Amount** is $30.00. The zeroes after the decimal point do not fill in automatically and must be entered.
- For the question about the family being "At risk of being evicted or forced to move." **Answer** No.
- **Click** on the **+ Add Housing Situation** button. **Enter** information showing they previously rented (unsubsidized) from 10/2016-02/2018. They were not evicted, and the monthly rent was $650. After completing the entry, **click** on the check-mark button to save it.
- **Answer** "No" to the **Utility Disconnection** and **Hard to work or participate in work activities** questions.
- **Check** the **No Action Needed** check-box to indicate that there is no **Action Needed**.
- **Click** the **Save** button and note/correct any errors on the page.
- After all entries are correct and the system shows the green check mark next to the page on the navigation tab, **ask** learners if there are any questions on the page before continuing.
- **Click + Continue** to go on to the next page.

Transportation

📄 **PG Pages 30-31**

This page collects information about transportation methods the participant may be able to access, as well as the status of his or her driver's license.

Transportation is often cited as one of the most important considerations for participants who are seeking work. **Ask** learners why assessing transportation is important for case management.

Case management benefits listed in the PG include:
- Reliable transportation is a key to participating in work or work activities and in getting and keeping employment.
- Some jobs require a valid driver's license.
- The type of license a participant holds (e.g., Regular, Occupational, Commercial, etc.) also impacts employability.
- You can document referrals given to the participant to assist with his or her transportation needs.

Walkthrough

The question *"Which transportation methods can you use to participate in work or work activities?"* is a drop-down field that allows you to select multiple methods. If you indicate that the participant has or borrows a car, questions about vehicle insurance coverage and registration display. Enter **Details** to explain the situation. If you select OTHER from the drop down, **Details** are required.

🖥️   **Click** on PERSONAL VEHICLE in the drop-down to show the data fields that appear. **Click** on it again to remove those fields**.**

This page has links to three tools from the Wisconsin DMV's website. Clicking on any of these tools opens a new browser window. Use the tools to help a participant:
- check the status of the participant's driver's license
- check eligibility for reinstatement of a suspended license
- check potential eligibility for an occupational license

If a license is suspended, an occupational license enables someone to drive only for limited purposes related to employment/school and maintaining his or her household (grocery shopping, medical appointments, attending church, etc.). More information on occupational licenses is available on the DMV website.

The next question is *"Do you have a valid driver's license?"* Answering Yes requires entries for the state of issuance, expiration date, and any restrictions. A No requires entry of a reason why the participant doesn't have a license and **Details** to explain.

Review the different items under **Action Needed**. The actions selected vary depending on the participant's circumstances. For example, a participant with a suspended license may be eligible to get an occupational license, and you can select Assist with Driver's License. Any tasks selected here are added to the **Action Needed** list.

As with other pages, you can enter **Notes** in the field at the bottom of the page.

Sandra doesn't have a vehicle. She walks and uses a bus to get around. Let's see how that look as we enter the information on the page.

🖥️   *Trainer Demo Entries*

- From the drop down of "Transportation Methods," **deselect** PERSONAL VEHICLE and **select** PUBLIC TRANSIT and BIKE/WALK by clicking on them.
- For "*Valid driver's license?"* **Answer** No.
- For the *"Why don't you have a valid driver's license?"* question, **select** NEVER APPLIED FOR A LICENSE from the drop-down.
- In the **Details** field, enter that *Sandra never applied for a license because she never needed one. She is not interested in getting one now.*
- **Check** the box to indicate that there is No Action Needed.
- **Click** the **Save** button and note/correct any errors on the page
- After all entries are correct and the system shows the green check mark next to the page on the navigation tab, **ask** learners if there are any questions on the page before continuing.
- **Ask** learners if Sandra's responses might prompt them to ask any follow-up questions (e.g. How well does she get around using the bus and walking? Has it created any problems with attending activities or looking for jobs?)
- After all questions have been addressed, **click + Continue** to go on to the next page.

Legal Issues

🖹 **PG Pages 32-33**

This page collects information about legal issues and required court appearances for the participant and members of the household. If Yes is answered for any question, additional information **must** be entered (such as dates of convictions, or upcoming court dates).

Ask learners what potential impacts assessing these issues can have on case management.

Case management benefits listed in the PG include:
- Legal issues may affect the participant's ability to participate in work or work activities.
- A Community Corrections Agent can be a collaborating partner in case management.
- Some required community supervision activities may be included in the Employability Plan.
- Referrals to outside resources may assist the participant with resolving or managing these issues.

Walkthrough

The first question asks, *"Have you ever been convicted of a misdemeanor or felony?"* Answering Yes to this question opens data fields for information about the conviction or multiple convictions as well as a question asking if the participant is on Community Supervision (Probation/Parole).

There is a separate question asking, *"Do you have any pending charges?"* These may impact a participant's employability now as well as in the future. Answering Yes requires entry of **Details** about the pending charges.

There are additional questions about restraining orders, "family members with legal issues" and "upcoming court dates." These situations also can affect ability to participate (for example, if family members' issues require the participant to be involved in meetings or transporting a family member). Similarly, participants may need accommodations for required court appearances when scheduling activities, even if the appearances are not related to charges or issues directly involving the participant.

Review the different **Action Needed** items. Anything you select here is added to the **Action Needed** list.

As with other pages, you can enter **Notes** in the field at the bottom of the page.

Sandra has had some legal issues. Let's enter that in the system.

⌨   ***Trainer Demo Entries***

- For *"Have you ever been convicted of a misdemeanor or felony?"* **answer** Yes.
- For **Type**, **select** MISDEMEANOR. For **Date of Conviction**, **enter** 06/2015. In the **Details, Enter** *retail theft*.
- For the question about "Community Supervision" **answer** No.
- **Answer** No for "Pending Charges," both restraining order questions and "Immediate family members with legal issues."

- For "Upcoming court dates" **answer** Yes. In the **Court Dates** section, **indicate** that the participant must appear in whatever county court you want three weeks from now as a witness in a lawsuit related to a traffic accident.
- **Check** the box to indicate that there is No Action Needed.

- **Click** the **Save** button and note/correct any errors on the page.
- After all entries are correct and the system shows the green check mark next to the page on the navigation tab, **ask** learners if there are any questions on the page before continuing.
- After all questions have been addressed, **click + Continue** to go on to the next page.

Participant Barriers

📄 **PG Pages 34-35**

This page collects information on the participant's health or personal life experiences that may impact his or her ability to get and keep employment. If Yes is answered for any question, additional information **must** be entered.

Why is it important for us to assess barriers? The assessment can:
- Assist you in determining if the participant may benefit from a formal assessment by a professional.
- Enable you to make important decisions such as the appropriate placement, short and long-term goals, and education and training activities.
- Identify any other services or work site accommodations needed.

Only the assigned FEP for this participant and his or her Supervisor can access this page (like WPBD in CARES Mainframe).

Note: If you are a RS you must complete the **Request Elevated Access** pop- up screen prior to gaining access to this page and the **Family Barrier** page. The state tracks and monitors these requests to ensure only those with a business need view and access these pages.

Walkthrough:

Questions about barriers can be very sensitive and are crucial to case management. Note that the Yes/No questions on this page also include a third option that the participant Refused to answer the question. You **must** ask the questions, but document if the participant refuses to answer them.

Do not encourage participants to refuse to answer. Make every effort to emphasize the benefits of answering the questions. If participants refuse to answer a question, remind them that they can volunteer to answer the question later.

The questions on this page are intended to bring out details of potential barriers. If the participant indicates that any of the issues identified on this page may impact participation, then create a barrier of the appropriate type using the + Add Barrier button to start the formal assessment referral process.

Physical Health section

The first two questions ask about **Physical Health**. Yes answers require an entry in the **Details** field.

💻   **Click** Yes to the first **Physical Health** question.

Answering Yes to either of the questions brings up a third question related to current visits to a health care provider and medications. A Yes answer requires an entry in the **Details** field.

Mental Health section

The second section of questions relates to **Mental Health.** These questions function the same way as the physical health questions, with Yes responses requiring **Details**.

⌨   **Click** Yes to the first **Mental Health** question.

A Yes to any of the three questions brings up a fourth question about treatment by a counselor or psychiatrist and taking medications for mental health conditions. A Yes answer requires an entry in the **Details** field.

AODA section

The third set of questions is about **AODA** issues. Yes answers require **Details**.

⌨   **Click** Yes to the first **AODA** question.

Answering Yes to either of the questions brings up a third question related to current AODA treatment. A Yes answer requires **Details**.

Cognitive and Learning Needs section

The fourth set of questions is about **Cognitive and Learning Needs**. Yes answers require details.

Domestic Violence section

📄 **PG Page 36**

The next section of questions has an added layer of confidentiality. Clicking Yes for **Display Next Section** opens the domestic abuse screening questions.

Important Note: Leave the default selection as No if it is not safe to ask these questions because other people are in the room or if the participant already has disclosed domestic abuse. If you determine it is not safe to ask the questions, just click No and move on. No additional notes or explanations are required.

⌨   **Click** Yes for **Display Next Section**.

If you determine it is safe to ask the questions, Click Yes and read the initial statement to the participant as it is written. Because this is a screening, also read each question to the participant exactly as it is written. Allow the participant the time to answer each question from his or her own perspective. Don't coach the participant or suggest responses.
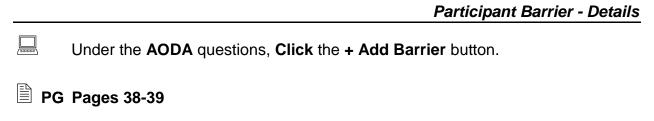
The participant can give a yes or no answer for each question or can refuse to answer. Check the **Refused** box only if he or she refuses to answer that specific question. A participant also can decline to complete the remaining questions at any time. Do not use the **Refused** box if this happens; just continue with the informal assessment and leave the responses to the remaining questions blank.

Scroll to show learners the questions that are included in the screening. There is a **+ Add Barrier** button below the questions.

If you click **Save** or **+ Continue** on this page, the questions in this section are hidden again, even if they have been answered.

As with other pages, you can enter **Notes** in the field at the bottom of the Participant Barriers page.

If the participant indicates that any of the issues identified on this page may impact participation, then create a barrier of the appropriate type using the **+ Add Barrier** button to start the referral process.

Participant Barrier - Details

⌨ Under the **AODA** questions, **Click** the **+ Add Barrier** button.

📄 **PG Pages 38-39**

When you click the **+ Add Barrier** button, it opens a **Barrier Details** page. Create a separate page for each barrier. Note that the **Barrier Type** defaults depending on which **+ Add Barrier** button you clicked. It is a drop-down and can be changed.

Barrier Subtype is available only if it is applicable (for Physical and Mental Health barriers and Cognitive and Learning Issues). An **Onset Month** is required. Note the information about an **End Month**. Entering an **End Month** causes WWP to consider the barrier "closed." Do this only when the barrier is no longer one that needs to be managed.

Use the **Details** field to provide additional details about the barrier.

You can enter a **Contact** for a treatment provider or any other resource related to the barrier. A Treatment/Assessment Provider contact type is confidential in the system, and only the assigned FEP or his or her supervisor can view and access this contact type. Any other type of contact is not confidential.

The **Formal Assessment** section contains links to four DCF forms:
- the Medical Examination and Capacity Form
- the Mental Health Report Form
- the Services and Accommodations Form
- the W-2 Formal Assessment Agreement

If an agency is using a state-approved local assessment form in place of the state form, it is not available on these links and **must** be accessed locally.

The Medical Examination and Capacity Form and the Mental Health Report Form open as PDF files that can be printed. They are not fillable forms.

The other two forms save the file in MS Word format.

When you enter a barrier, a **Referral Date** for a Formal Assessment is mandatory. You can enter a date that is in the past. You also can indicate if a participant declines a referral.

⌨   **Click** the **Referral Declined** box to show what happens when you do that. **Uncheck** the box to display the data fields.

Use the **Details** field to explain the circumstances of the referral.

After an assessment is complete, enter the **Assessment Date**. You cannot enter a future date in this field. Checking the Assessment Not Completed box requires **Details**. Check this box only if there will not be a formal assessment done for this barrier. If the referral has been made, but the assessment is not yet complete, leave the **Assessment Date** field blank.

⌨   **Enter** an **Assessment Date** using a date from a month ago.

When you enter an **Assessment Date**, a selection from the drop-down *"How long will the symptoms likely last?"* is required.

⌨   **Click** the drop-down to show the available options.

In addition, you **must** enter a **Recommended Reassessment Date** or check the box showing **Not Needed**. Use the **Details** field to add specifics about the duration or reassessment date.

When an **Assessment** Date is entered, you must enter a **Contact** for an assessment provider. TREATMENT/ASSESSMENT PROVIDER is one of the contact types you can select from the drop-down. This type of contact is confidential.

You can record up to three formal assessments for a barrier. Use the **+ Add Formal Assessment** button to document an additional assessment.

Use the **Delete** button (trash can icon) to delete a formal assessment. If all the required fields are entered and the information on the formal assessment is saved, you **must** select a reason when deleting.

The final section of the page asks about **Accommodations.** This section **must** be completed if you entered an assessment date and information regarding the formal assessment. If the answer to the accommodation question is Yes, then you **must** enter information about the accommodation(s).

🖳   **Click** Yes for the *"Are accommodations needed?"* question.

There is a drop-down to indicate what the accommodation is for. The accommodation options are based on information from the Job Accommodation Network (JAN) website (listed in the **Additional Resources** in the PG.)

You can enter a **Begin Date** and **End Date** for the accommodation if applicable. **Details** are required to explain the accommodation.

You can enter additional accommodations for the same barrier by clicking the **+ Add Accommodation** button.

Use the **Delete** button (trash can icon) to delete an accommodation. Note that you **must** select a reason when deleting if all required entries for the accommodation were completed and saved.

When you create a Domestic Violence barrier, the formal assessment section does not display. The only required entries are the **Barrier Type** and **Onset Month**. **Accommodations** can be added. If the participant discloses a domestic violence barrier, remember you must make the case confidential in CWW.

🖳   **Click** the X in the upper left-hand corner of the page to close the barrier details view.

Sandra doesn't report any physical or mental health issues but does tell us she's had some problems with alcohol. Let's enter that information on the page.

⌨   ***Trainer Demo Entries***

- For both Physical **Health** questions **select** No.
- For all three of the **Mental Health** questions **select** No.

   AODA:
- For both AODA questions **select** Yes. In the first **Details** field **enter** *I have had problems with drinking with my friends.* In the second one **enter** *Missed shifts due to alcohol use in past jobs.*
- For the "AODA Treatment" question **select** Yes. In the **Details enter** *Seeing a counselor weekly*.
- **Note** that Sandra says this issue may impact participation and she already is seeking treatment. This means it is appropriate to create an AODA barrier.
- **Click** the **+ Add Barrier** button.

   AODA Barrier Details:
- AODA is selected as the default on the detail page. **Enter** an **Onset Month** of 03/2016.In the **Details** field **enter** *Began counseling after court referral for assessment in 2016.*
- **Click** the Add Contact button (plus sign)**. Select** the **Contact Title** as TREATMENT/ASSESSMENT PROVIDER. A contact of this type is confidential.
- For the **Name enter** JOHN TAFFER and a **Phone** of 608-257-1234. Indicate that an ROI was signed on today's date. **Point out** that the link to download the ROI form is right in the **Add Contact** dialog box.
- **Click** Save to close the **Add Contact** dialog box. **Note** that the contact now shows on the **Barrier Details** section.

- For the **Referral Date enter** "03/14/2016" and **note** in the **Details** that the *referral was court ordered*.
- For the **Assessment Date enter** 10/01/2018. In the **Details** box **enter** *Most recent report from AODA Counselor*.
- From the drop-down for How long will the symptoms likely last? **select** 1 YEAR OR LONGER. In the **Recommended Reassessment Date** field **enter** 04/01/2019.
- in the **Details enter** *Next assessment with counselor due in April 2019*.
- The assessment did not restrict Sandra's hours of participation, so we will not enter anything for **Hours the individual can participate.**

- **Click** the **Search** button (magnifying glass icon) in the **Contact** field. **Select** John Taffer from the list of contacts that appears because he is also the assessment contact.
- Upon returning to the **Formal Assessment** section, note that there are options to edit the contact (pencil icon), clear the information from this field but leave it on the contact list (eraser icon) or delete the contact information from the system (trash can icon).
- For "Are accommodations needed?" **indicate** No
- **Click** Save and Exit to return to the **Participant Barriers** page. **Note** that the Barrier now displays on the page.

    Completing Participant Barriers Page:
- For all the **Cognitive and Learning Needs** questions **select** No.

- **Select** Yes to **Display Next Section. Select** No as the response for each of the questions, as Sandra is not experiencing any domestic abuse issues.

- **Click** the Save button at the bottom of the page. **Note and correct** any errors that are highlighted on the page. **Check** that the green checkmark is next to the page name in the navigation menu.
- **Ask** learners if there are any questions on the page before continuing.
- **Click + Continue** to go on to the next page

Child and Youth Supports

 📄 **PG Pages 40-41**

This page collects information about children who may need services and support, especially child care. There are also questions related to WIC, Head Start, and other community programs for youth.

There are many case management benefits to collecting this information. **Ask** learners to name some of them.

Case management benefits listed in the PG include:
• Child care is essential to a parent to participate in work or work activities.
• A Child Welfare Worker involved with the family can be a collaborating partner in case management.
• Contact information for a Child Welfare Worker or other provider can be entered in the Contacts list from this page.
• Some court-ordered or planned child welfare activities may be included in the employability plan.
• Other resources that can benefit the children and may improve the life of the family can be identified on this page.

Walkthrough

Like CMCC in CARES, never enter confidential information like diagnoses on this page when describing special needs situations.

*** Access to this page is not restricted. Any worker in your agency can see the data entered here. Be sure not to enter confidential data. ***

Any information about children in the W-2 group displays as referential data from CWW above the questions. Data is for reference only and is not populated in WWP. The information about children must be entered by the worker.

There are two questions about children in the household. Answering Yes to either of these questions opens data fields for entering details about the children. Identifying a child as having special needs brings a question about participating in special needs programming.

Questions about WIC and Head Start are only displayed for participants who have a child under 5 years old.

Questions about mentoring and after school programs are only displayed for participants who have a child age 5 to 18 years old.

The next question applies to both children in the household and children of the participant who live with another person most of the time. Answering Yes to the "*Do any of your children currently have a child welfare worker?*" question opens a new set of fields to indicate which child has a worker, a **Details** field for explaining the current plan, and an opportunity to enter contact information for the Child Welfare Worker.

The question after that applies to the participant. *"Did you or will you age out of foster care?"* is displayed only for participants age 25 and under. Clicking Yes shows information and a link related to Independent Living Services. It also requires **Details**.

⌨   **Click** on Yes for this question to show the information and link**. Click** on the link to show the site that opens as a resource. **Close** the window for the website and **change** the answer back to No.

Answering Yes to *"Will there be any changes with your child care in the near future?"* opens a **Details** field to explain the future change (such as child will turn 13 and no longer be eligible for Wisconsin Shares, or child will be out of school for the summer and needs full-time child care).

Review the different action items in **Action Needed**. Any item you select is added to the **Action Needed** list.

Now we'll enter information for Sandra's family.

⌨   *Trainer Demo Entries*

- For *"Do you have any children age 12 years old or under?"* **answer** Yes. **Enter** a daughter, Zahara Mann, born in 2011 (8 years old), who is in an informal care arrangement and does not have special needs.
- **Click** the **+ Add Child** button and enter a son, Adrian Mann, born in 2015 (3 years old), who also has an informal care arrangement. Indicate that Adrian has **Special Needs** and explain in the **Details** field that *he has behavior issues*.
- For Children 13-18 with special needs **answer** No.
- For *"Does your family participate in any special needs programming?"* **answer** Yes. In the **Details** field **enter** *Adrian participates in the school district's early childhood program.*
- **Indicate** the family does receive WIC but does not participate in Head Start.
- **Indicate** that no children participate in after school or mentoring programs.

- **Answer** Yes that one of the children has a child welfare worker. The worker is for ZAHARA and the plan details should state that *an initial assessment meeting has taken place and the plan is still under development*.
- **Create** contact information for the child welfare worker (Tammy Sorenson, 608-555-5432). **Indicate** that Sandra signed a Release if Information (ROI) on today's date.
- **Click Save** to return to the main page.

- **Indicate** that Sandra did not age out of foster care.
- **Indicate** that no changes in the family's child care are expected soon.

- **Enter** an **Action Needed,** by clicking the Add button, for referring to Wisconsin Shares. **Click** on the **Edit Entry** button to open the **Edit Task** dialog box.
- **Indicate** that the task is assigned to the Participant. The **Task** is to apply for Wisconsin Shares at the Income Maintenance (IM) agency or Call Center. **Enter** a due date two weeks in the future. **Select** HIGH as the **Priority** from the drop-down. In the **Details** field, **enter** that *Follow up with the FEP when eligibility for Wisconsin Shares is established. Here is the website and phone: https://access.wisconsin.gov or 888-555-1111.*
- **Click** Save to close the dialog box and save the task.

- **Click** the **Save** button and note/correct any errors on the page.
- After all entries are correct and the system shows the green check mark next to the page on the navigation tab, **ask** learners if there are any questions on the page before continuing.
- After all questions have been addressed, **click + Continue** to go on to the next page.

Family Barriers

📄 **PG Pages 42-43**

This page collects information about SSI/SSDI applications for the participant and other household members as well as information about other family issues that may impact a participant's ability to participate in work or work activities.

Family barriers can impact case management just as significantly as a participant's barriers. **Ask** what learners think could be important benefits of assessing them.

Case management benefits listed in the PG include:
- If the participant has applied for or is interested in information about SSI/SSDI, have a conversation about the process and referrals for assessment.
- Connect the participant to an SSI/SSDI advocate if appropriate.
- You can make referrals to resources that address other family needs as well.

*** Only the assigned FEP for this participant and his or her Supervisor can access this page. ***

Walkthrough

The first section of the page is about **SSI and SSDI**.

💻   **Click** Yes for the question "*Have you ever applied for SSI or SSDI?*" A Yes answer opens more questions about prior applications for and/or receipt of SSI/SSDI. Answers to those questions may lead to the entry of more **Details**.

💻   **Click** to change the answer back to No.

Answering Yes to the question *"Are you interested in learning more about the SSI/SSDI application process?"* opens a **Details** field that requires you to enter an explanation.

💻   **Click** Yes to the question *"Has anyone in your family ever applied for SSI or SSDI?"* Answering Yes brings up more questions about past receipt of SSI/SSDI or the status of current applications for family members.

💻   **Click** to change the answer back to No.

The next section of the page asks questions about **family needs** and begins with a link to the "Need to care for a disabled family member" form. It will also display any available referential Learnfare data from CWW.

Answering Yes to the question about "caretaking responsibilities" requires entries to indicate which family member needs care and **Details** about the situation.

Similarly, a Yes answer to the question about "risky activities" requires an explanation in the **Details** field. The same is true for the questions about "Other behavior problems," "Suspension or expulsion from school," and "Other issues with your family."

Review the different action items available in **Action Needed.** Anything you select here is added to the **Action Needed** list.

Let's complete the entries on this page for Sandra and her family.

⌨   *Trainer Demo Entries*

- For *"Have you ever applied for SSI or SSDI?"* **answer** No.
- For "Learning more about SSI/SSDI" **answer** Yes. In the **Details** field, indicate that *Sandra has a son with a disability and would like to check into SSI for him*.
- For *"Has anyone in your family ever applied for SSI or SSDI?"* **answer** No.
- For "Caretaking responsibilities" **answer** Yes. Indicate that Sandra cares for her son, Adrian Mann. In the **Relationship** field, Select MINOR CHILD from the drop-down. In the **Details** section, enter that *behavior issues due to disability require parental supervision at all times*.
- Note the new question about *"Concern that these caretaking responsibilities will make it hard to participate."* **Answer** Yes, and in **Details** that *Sandra needs to be constantly supervising Adrian*. At this point you are taking the participant's word for it but remind learners about the link to the **Need to Care for Disabled Family Member** form. You will request more information in the **Action Needed** section.
- **Answer** No to the question about "risky activities."
- **Answer** No to the question about "Other behavior problems." Adrian's issues were already explained in other entries on this page.

- For the questions about "Suspension or expulsion from school" and "Other issues with your family" **answer** No.
- In the **Action Needed** section, click on the **Add** button to provide Need to Care for Disabled Family Member form. **Explain** to learners that we can leave this as a generic task and not enter details or a due date because this is something we will take care of before the participant leaves this appointment. We don't need interrupt the flow of the informal assessment to get the form now.

- In the **Action Needed** section, click on the **Add** button to Assess for SSI/SSDI Advocacy. **Click** on the **Edit** button to open the **Edit Task** dialog box.
- **Indicate** that the task is assigned to the Participant. The **Task** is to meet with the SSI/SSDI Advocate Gail Smith. **Enter** a due date two weeks in the future. **Select** MEDIUM as the **Priority** from the drop-down. In the **Details** field, **enter** that *appointment is scheduled at the job center one week from today's date <enter actual date>*.
- **Click Save** to close the dialog box and save the task.

- **Click** the **Save** button and note/correct any errors on the page.
- After all entries are correct and the system shows the green check mark next to the page on the navigation tab, **ask** the class if there are any questions on the page before continuing.
- After all questions have been addressed, **click + Continue** to go on to the next page.

Non-Custodial Parents

📄 **PG Pages 44-45**

This page collects information about the participant's role as a non-custodial parent (NCP), including information about the primary caretaker and the child.

A participant's role as an NCP may have impacts on his or her participation and employability. **Ask** learners for some benefits of assessing for this.

Case Management benefits listed in the PG include:
- Stressful family situations also can impact the participant's ability to secure and maintain employment.
- A non-custodial parent who struggles with making child support payments, payments on arrears (back monies owed on child support), visitation conflicts, and/or other issues related to co-parenting may create barriers.
- You can make referrals for services to support the participant.
- There may be an opportunity for connecting the other parent with services that could benefit the child.

Walkthrough:

The page initially features a single question, *"Do you have any children 18 or under who live with another individual most of the time?"* Answering No to this question requires no further entries on the page.

🖥️   **Click** Yes for the question.

A Yes answer opens new data fields to enter information on the **Primary Caretaker** and the **Children** involved.

Sandra is not an NCP, so we have minimal information to enter here.

⌨ *Trainer Demo Entries*

- For "Do you have any children 18 or under who live with another individual most of the time?" change the answer back to No.
- Click the + Continue to go on to the next page.

NCP Referral

📄 **PG Pages 46-47**

This page collects information about the Non-Custodial Parent(s) (NCPs) of the participant's children.

Benefits of collecting this information can include:
- Services provided to NCPs may help strengthen family relationships and enhance the economic well-being of the children.
- You can make a referral for NCP services. (Services offered by W-2 agencies vary but could include TEMP and/or TJ/TMJ.)

Ask Are there other benefits you can think of? (**note to trainer** – it's OK if they can't)

Walkthrough

The page initially features a single question, *"Do you have any children age 18 or under whose other parent isn't living with you?"* This is referring specifically to a non-custodial parent. There are three possible responses: Yes, No, and Skip. Skip the question only if it isn't appropriate to ask the participant for this information at the time of the assessment (e.g., there is a domestic violence situation), if the participant is the non-custodial parent, or if the participant refuses to provide the information. Document any non-confidential circumstances in the **Notes** field.

Answering No to this question requires no further entries.

⌨ **Click** to select Yes for the question.

A Yes answer displays information that you **must** provide to the participant. You can see that it is a lot of information.

🖥️   **Scroll** past the text box to the area of the page where data is entered.

Data is gathered on both the **Other Parent** and the **Children**. More than one child can be associated with an NCP by clicking on the **+ Add Child** button. You can enter more than one NCP by clicking the **+ Add Other Parent & Child(ren)** button.

For the **Other Parent** section, the **First Name** is required. Enter the remaining information if the participant knows the answers to the questions. Enter **Details** for the first two questions. If the answer to the "getting into contact" question is Yes, a **Contact** field appears to enter the NCP's contact information.

For the **Children** section, the **First Name** is required. Other questions include a drop-down for "How often does the other parent have contact with the child?" and a **Details** field to explain. There is also a question about a "child support order" for the child with an associated **Details** field.

Finally, as with other pages, a **Notes** field is available at the bottom of the page.

Sandra gives us information about her children's other parent.

🖥️   *Trainer Demo Entries*

- For *"Do you have any children age 18 or under whose other parent isn't living with you?"* **answer** Yes.
- **Enter** the name JAMES MANN as the **Other Parent. Indicate** that James is not presently "working or available for work," with *James is not currently paying child support due to being unemployed* in the **Details** section.
- **Indicate** that James is not "interested in participating in a work program."
- **Indicate** that Sandra does not know how to contact James.
- **Note to Trainer:** If anyone asks why she doesn't know how to contact him, explain that he has weekly visitation with Adrian, but shows up only 1-3 times a month for it. Sandra has no other contact with him.

- **Enter** ADRIAN as the **Child**. In the drop-down, **select** that James has contact with him 1-3 TIMES PER MONTH.
- **Indicate** that there is a "child support order" for $200 per month.
- **Click** the **+ Add Child** button and **enter** the same information for Zahara.

- **Click** the **Save** button. **Note and correct** any errors on the page. **Check** that the green checkmark is next to the page name in the navigation menu.
- **Ask** learners if there are any questions on the page before continuing.
- Click **+ Exit** to go to the **Informal Assessment Summary** page.

Informal Assessment Summary

📄 **PG Pages 48-49**

After you have completed the entries on all pages of the informal assessment and clicked Exit, WWP takes you to the **Informal Assessment Summary** page.

This page shows a summary of the information entered on all pages in the informal assessment and is where you submit the completed informal assessment. You can access informal assessment entries from this page to edit a current entry or view the history of previous entries. Information from confidential pages (Participant Barriers, Family Barriers) display only for the assigned FEP and his or her supervisor.

Benefits for case management include:
- The informal assessment information is viewable in one place.
- Sections can be expanded or collapsed to show details.
- Notice patterns to help with goal and activity planning.
- Any incomplete/incorrect entries can be accessed and edited easily before submitting the completed assessment.

At the top of the page is the Submit button that submits the completed informal assessment.

Walkthrough

When all sections of the summary are expanded, it is a very long document. **Scroll** down the page to show how data is summarized from the informal assessment pages. **Click** to collapse several sections to show how that is done.

The full questions from the individual assessment pages are shortened in the fields of this page. You can mouseover a field title to see the full questions.

🖥️   **Mouseover** a few field titles to show how the full question displays.

The navigation listing on the left shows green check-marks for all the pages in the list. This means all the pages have been completed and saved, but not submitted. If some pages were not completed at all, no check-marks display. If some pages were partially completed, a yellow exclamation point displays. If a page was not fully completed but saved with errors, a red exclamation point displays.

🖥️   **Click** the **Participant Barriers** page in the navigation listing. **Scroll** to show the blue highlighted section.

Notice the section highlighted in blue and titled **Display Next Section.** This is for the domestic abuse screening questions. Initially it indicates only if you selected Yes or No for that section. Clicking on the Expand button shows responses to the individual questions.

🖥️ **Click** the **Work History** page in the navigation listing. **Click** the edit icon for the **Work History** page.

Clicking the edit icon takes you directly to that page of the informal assessment, and you can make any changes on the page. Changes **must** be saved. If no changes are made on the page, you can navigate to any other page on the list…

🖥️ **Click** on the **Housing** page in the navigation listing.

…as we just did by going to the **Housing** page. You also can go back to the informal assessment summary by clicking the Back button or going to the **Case Management** navigation toolbar and then selecting **Informal Assessment.**

🖥️ **Click** on the **Back** button.

Review the responses with the participant to ensure that answers are accurate. Then submit the assessment as complete – as we will now do for Sandra.

💻 *Trainer Demo Entries*

- **Scroll** down the page to show how data entries are summarized from the informal assessment pages.
- **Note** that the Submit button at the top of the page is green and active. If all pages in the assessment were not complete, the button would be red, and the assessment could not be submitted. If the assessment already had been submitted, the button would be green, but would not be active.
- You have the option to print the full informal assessment summary if needed. Be aware that confidential information does print.
- **Click Submit.**

📄 **PG Page 50**
- Note the screen indicates that the informal assessment has been successfully submitted. This records an informal assessment completion on CARES screen WPTN.
- **Click Continue** to return to the **Informal Assessment Summary** page.

And with that, we have completed the WWP Informal Assessment. Next, we have a couple of items to review, do and think about after submitting a completed Informal Assessment.

Tasks to complete after submitting the informal assessment

📄 **PG Page 51**

After you have submitted the informal assessment, there still are tasks to complete.

- Review the **Action Needed** list with the participant.

🖥️   **Click** on the **Case Management** navigation toolbar in the header, and then select **Action Needed**.

If the participant has tasks to complete, you can print the list for him or her. Note that this list is not an Employability Plan, and items on it are not subject to W-2 payment reductions unless they are assigned as activities on the Employability Plan.

- You also may have entries to make in other systems. If you complete an initial assessment with a participant, you may be making a W-2 placement in CWW after the informal assessment. Remember to document placement decisions in Case Comments.

- PIN comments must be entered in CMCC in CARES Mainframe that summarize the informal assessment information and the job readiness of the participant. WPRU is no longer available in CARES.

- Remember, NOTES in the WWP informal assessment don't transfer to CMCC. Anything that you currently are required to enter on CMCC still **must** be entered there.

- After the assessment is complete, you may also be creating an employability plan on CARES Screens WPJS and WPAS and assigning activities on WPCS. These screens in CARES still function the same way they always have.

- Always remember to enter comments about the EP and activities in PIN comments on CMCC**.**

Informal Assessment Summary (after submitting assessment)

📄 **PG Pages 52-53**

After you have submitted the completed informal assessment, WWP returns you to the **Informal Assessment Summary** page.

Walkthrough

🖥️   Return to the **Informal Assessment Summary** page

Notice the green check-marks are gone from the navigation menu. Clicking on a page in the navigation menu scrolls to that section of the **Informal Assessment Summary**.

🖥️   **Click** on the **Housing** page in the navigation menu to show how this is done.

There are two buttons available at the top of the page: **Edit Assessment** and **New Assessment**. **Edit Assessment** restarts the informal assessment driver flow and presents each page with the existing data, but you can use the navigation menu to go to the pages you need to update.

🖥️   **Click** Edit Assessment.

You can update any field on a page; then click **+ Continue** to display the next page.

🖥️   **Click** on the **Housing** page. **Scroll** down to the Notes field and type in a short note (such as "This is a note."). **Click + Continue**.

Note that there is now a green check mark next to the **Housing** page in the navigation menu and WWP automatically continued to the **Transportation** page.

You can exit the flow at any time by going back to the **Informal Assessment Summary**.

🖥️   **Click** on the **Back** button next to **Edit Assessment** in the header to return to the **Informal Assessment Summary**.

The **New Assessment** button starts from the beginning of the informal assessment driver flow, requires completion of all the pages and submission of the completed assessment. Any data you entered previously remains and can be updated, but you **must** update any places where you checked the **No Action Needed box**. Remember, initiating a new assessment means you **must** review all the informal assessment pages with the participant.

📄 **PG Page 53**

Review the following W-2 Policy References: W-2 Manual Chapter 5.2.1 specifies that a new informal assessment in the system **must** be completed at initial W-2 placement and at each placement change. Chapter 5.2.2. requires that the informal assessment inventory not only be completed initially, but also be reviewed as part of ongoing case management.

Walkthrough Complete

We covered a lot of information during this walkthrough. Don't worry if you feel like you didn't get everything. You will have opportunities to practice with WWP.

Ask What are your reactions to seeing an entire WWP Informal Assessment walkthrough? Get several reactions from learners and note any common themes you hear.

Transition to Guided Entry: Brenda

Now that we have shown you how the system works, it's time for you to make informal assessment entries along with us. We'll be working together on referring and assessing Brenda.

Guided Entry– Brenda

Learners will make entries in CWW and WWP Training Environments along with the trainer for Brenda's case.

Client Registration/Referral

📄 PG Page 54

Before we begin an informal assessment with an individual, that person must have a PIN in CWW, be referred to Work Programs, and enrolled in WWP. This process is like referring an individual to CARES Mainframe. When WWP is implemented, enrollment no longer will happen in Mainframe.

For training purposes, we must begin by creating a case in CWW Training that can be referred. This process starts with Client Registration.

Note to Trainer:
The scenario information given to learners is in italics for each page. This is a guided walkthrough. Talk through all entries you are making and be sure to move at a pace that all learners can follow. For entries in Details, Notes, and Case Comments fields, focus on the type of information to enter instead of an exact wording of what to enter.

Basic Information

Brenda is requesting W-2 services. Following the Trainer's entries in CWW Training, register Brenda _____ (make up a last name). Make up her SSN. She was born in 1991.

Brenda lives with her mother at 234 Maple St., Pewaukee, WI 53072. Her cell phone number is 262-983-5555. Brenda has a four-year-old son, Quinn.

🖥️

- **CWW Training Environment (access from the Systems Gatepost page):** https://trn.cares.wisconsin.gov/
- Logon to CWW Training Environment using your WAMS ID
- From the Navigation Menu, **Select Client Registration** then **Select Basic Information**.
- **Enter** BRENDA as the first name, make up a last name, from the **Gender** drop-down **select** FEMALE, make up a **Social Security Number**. (**Remind** learners that it is best to use random numbers when doing this. Numbers in order may have been used already and could cause issues with Clearance.) **Enter** Brenda's **Birth Date** for the year 1991.
- **Click** Next.

Potential Individual Matches

- **Ensure** there are no exact matches for Brenda. If any learner has a 100% match, data **must** be changed on the **Basic Information** page before creating a new RFA.
- **Select** the radio button for Create New RFA using entered Basic Information and **Click** Next**.**

Additional Data

- **Select** ES-ECONOMIC SUPPORT as the **RFA Type** from the drop-down. **Enter** today's date as the **Contact Date. Select** W-WALK IN as the **Contact Method** from the drop-down and E-ENGLISH as the **Language.**
- The **County/Tribe** should default to 18-EAU CLAIRE COUNTY. **Enter** 5518 as the **Eligibility Office.** Each learner enters his or her worker ID in the **Assigned Worker ID** field. The **Application Source** field should default to LA – LOCAL AGENCY OFFICE. (**TRAINER NOTE –** If eligibility office 5518 does not work, use office 5018)
- **Indicate** that Brenda's **Race** is BLACK/AFRICAN AMERICAN. **Click** the button to Populate Unknown Responses as No.
- **Select** NO for the **Hispanic** field.
- **Enter** Brenda's **Address** as *234 Maple Street, Pewaukee, WI 53072*. Her cell phone number is 262-983-5555.
- **Click** Next.

Program Requests

- **Indicate** Brenda is requesting only W-2.
- **Click** Next.

Print Application Registration

It is not necessary for us to view/print this in training. Leave the default entries as they are and **click** Next.

Complete Request for Assistance

- For the **Registration Filing Date, enter** today's date**.**
- **Click** the button to Make all Blank Program Filing Dates the same as the Registration Filing Date.
- **Click** Next.

RFA Comments

- In the **Comment** field, **enter** *Brenda is applying for W-2. She has a four-year-old son, Quinn, and is living with her mother.*
- **Click** the Add button.
- **Click** Next.

RFA Summary

- **Ensure** that the **RFA Status** is CR Complete.

After completing Client Registration, you must begin Application Entry to get to the point in CWW for you to refer Brenda to WWP.

- **Select** the radio button for Begin Intake Interview and **Click** Next.

Review Basic Information

No entries are needed on this page.   **Click** Next.

Individual/Case Clearance Results

Ensure Brenda passes clearance.   **Click** Next.

Case Comments

- In the **Comment** field, **enter** *Brenda passed clearance. Referring for assessment.*
- **Select** I – INTAKE as the **Comment Type.**
- **Click** the Add button.
- **Click** Next.

Household Members

Because we are not building a complete case for the purposes of this training, we are not entering Quinn on the **Household Members** page. Go ahead with the default information entered on this page.

- **Click** Next.
- An information box about adding additional members to the case displays at the top of the page. **Click** Next again to continue.

Health Care Request

This page defaults to NO for the request based on the Client Registration entries.

🖥️   **Click** Next to continue.

Medicare Savings Program Request

🖥️

- **Select** NO for Requesting this Program/Subprogram of Assistance?
- **Click** Next.

Family Planning Waiver Request

This page does not require entries. 🖥️   **Click** Next to continue.

Caretaker Supplement Request

This page defaults to NO for the request based on the Client Registration entries.

🖥️   **Click** Next to continue.

FoodShare Request

This page defaults to NO for the request based on the Client Registration entries.

🖥️   **Click** Next to continue.

Child Care Request

This page defaults to NO for the request based on the Client Registration entries.

🖥️   **Click** Next to continue.

W-2 Request

This page defaults to YES for the request based on the Client Registration entries.

- In the **Financial Employment Planner Information** section, **type** your CARES ID in the **Assigned FEP ID** field.
- Enter the current month and year for the **Effective Month** in the **Subsidized Housing Information** section.
- Select **3-No Housing Subsidy** from the **Low Income Subsidized Housing Status** drop-down.
- **Select** BRENDA from the **Individual** field drop-down for **W-2 Work Program Referral for Assessment.**
- **Click** the Refer Selected Individual button**.**
- **Note** the referral message that displays at the top of the page. CWW still mentions WPEN even though enrollment is now done in WWP, This reference will be fixed at a later date.
- **Record** Brenda's PIN from this message so you can find it if needed when enrolling her in WWP.

Brenda is referred to WWP. For our training purposes, no further actions are necessary in CWW. Next, we find her PIN in WWP and enroll her.

Note to Trainer: Ensure all learners have completed the referral before having them log in to WWP for enrollment.

WWP Entries

🗎 **PG   Page 55**

Find Brenda

🖳

- **WWP Training Environment:** https://wwptrn.wisconsin.gov/
- Logon to WWP using your WAMS ID
- **Note to Trainer:** If you (on your trainer computer) are not already there, **click** on the WWP logo to get to the list of recently accessed PINs. This is the default view for learners when they log in. Although there are likely PINs on your screen, the learners' screens should not show any when they log in to WWP Training.

There are multiple ways to find an individual who is referred to WWP but is not yet enrolled. Individuals referred to you should be listed on the **Participants by Worker** tab of the **WWP Home Page**. This is the quickest way for us to find Brenda.

We recorded Brenda's PIN in case we need to do a PIN search in WWP.

🖳

- **Click** the tab for **Participants by Worker**.
- **Click** on Brenda's PIN to go to the **Participant Summary** page.

Participant Summary/Enrollment

🖳

- **Click** the **Enroll Participant** button.
- In the **Enroll Participant** dialog box that opens, ensure your name is in the **FEP ID** field. It should be auto-populated from CWW.
- **Click** the **Enroll** button.
- **Note** the box closes, and now the **Participant Summary** page has different buttons at the top of the page (Disenroll, Reassign Worker, and Office Transfer).
- **Click** on the **Case Management** navigation toolbar in the header, and then **Click** the **Informal Assessment** icon.
- When the **Informal Assessment** page opens, **click** the **New Assessment** button

Languages

Brenda reads, writes, and speaks English.

⌨

- **Change** the answer for *"What language do you use at home?"* to ENGLISH.
- **Indicate** it is read, written, and spoken.
- **Click + Continue** to save and go to the next page.

Work History

Brenda is unemployed. She says she is not working because her current issues with depression and anxiety make it hard for her to balance a job with all her other struggles.

She worked as a Personal Care Attendant with Park Care CBRF in Pewaukee from April 24, 2015 through June 9, 2018. The CBRF is located at 1109 Cecelia Drive. Her duties included bedside personal hygiene, maintaining records, cleaning and disinfecting equipment, laundry, administering medications, and helping with meals. The job did offer paid time off and medical insurance.

She left due to concerns with her health and stress from the job. She made $9.90 per hour for 40 hours per week when she started. When she left, she made $11.90 per hour for the overnight shift.

Brenda says she liked working with residents individually. As time went on, staffing became an issue and she couldn't spend as much time with residents. The pressure of taking on additional duties to cover for staff shortages affected her anxiety. She does not want to return to a health care occupation as she feels the stress is too much for her.

⌨

- For the "Employment Status" at the top of the page, **select** Unemployed.
- From the drop-down of *"What is keeping you from working full-time?"* **select** MEDICAL ISSUES/DISABILITY
- In the **Details** field, **enter** *Issues make retaining employment difficult*. **Remind** class that we do not enter any confidential information (like a diagnosis of Depression) in the **Details** field. It is OK to refer to the confidential file or the Participant Barriers page for details as appropriate.
- **Answer** Yes to the "ever been employed" question.
- **Click** the **+ Add Work History** button.

- **Select** UNSUBSIDIZED as the **Job Type.**
- **Enter** 04/24/2015 as the **Begin Date** and 06/09/2018 as the **End Date.**
- **Enter** PERSONAL CARE ATTENDANT as the **Position,** PARK CARE CBRF as the **Company.**
- **Start Typing** PEWAUKEE as the **Location** and wait for the system to prompt you with PEWAUKEE, WI, USA. **Click** on PEWAUKEE, WI to populate it in the field.
- **Enter** 1109 CECELIA DR. for the **Street Address.** The **ZIP** of 53072 auto-populates.

- In the **Job Duties** field, **enter** BEDSIDE PERSONAL HYGIENE, MAINTAINING RECORDS, CLEANING AND DISINFECTING EQUIPMENT, LAUNDRY, ADMINISTERING MEDICATIONS, AND HELPING WITH MEALS.
- In the **Reason for Leaving** field, **select** ILLNESS from the drop-down. **Enter** *Could not continue to work due to issues* in the **Details** field. **Remind** learners that confidential information must not be entered in the **Details** field.
- In the **Wage/Hours Information** section, **select** HOURLY WAGE from the **Pay Types** drop-down. **Enter** 40 as her **Avg Weekly Hours.**
- **Enter** $9.90 as her **Beginning Rate** and **select** per HOUR from the drop-down.
- In the **Ending Rate** field, **enter** $11.90 and **select** per HOUR from the drop-down.

- In the **Notes** field, enter *Brenda enjoyed working with residents. She does not want to return to a health care occupation as she feels the stress of staff shortages is too much for her*.
- **Click** Save & Exit to save the information on this job and return to the **Work History** page.
- **Click + Continue** to save and go to the next page.

Work Programs

Brenda has no past or current involvement with any other work programs.

- **Select** NO to indicate Brenda has no "past or current involvement with any other work program."
- **Click + Continue** to go to the next page.

Education History

Brenda has a HS Diploma. She graduated from Jefferson High School, located in Jefferson, WI, in 2010.

🖳

- **Click** on Diploma.
- In the **Location** field of the **Last School Attended (K-12)** section, **type** JEFFERSON. **Select** JEFFERSON, WI, USA from the suggested cities.
- In the **School Name** field, **type** JEFFERSON and **select** JEFFERSON HIGH SCHOOL from the suggested results.
- **Enter** 2010 as the **Last Year Attended.**
- **Click + Continue** to save and go to the next page.

Post-Secondary Education

📄 **PG Page 56**

Brenda never attended college. She obtained a certification as a Personal Care Worker in April 2015 through a program sponsored by Waukesha County Technical College (WCTC).

🖳

- For "Attended or are you currently attending" **answer** No.
- **Indicate** that Brenda does have "Licenses or Certificates."
- **Select** CERTIFICATE as the type and **enter** PERSONAL CARE WORKER as the **Name**.
- **Select** YES to indicate it is **Valid in WI**. As the **Issuer, enter** WCTC.
- For the **Date Attained, enter** 04/2015**. The **Expiration Date** is unknown, so leave it blank.
- **Click + Continue** to save and go to the next page.

Military Service

After graduation from High School, Brenda enlisted in the Navy (July 2010). She was honorably discharged in July 2014 with a rank of E3 and a rating of LS (Logistics Specialist). She worked with mail at a large base in California. She does not know if she is eligible for any benefits because of her military service, but she has an appointment next Tuesday with someone at the Waukesha County Veterans Service Office.

Brenda enjoyed sorting the various kinds of mail and packages. She felt it was a job that was important to the people who lived and worked at the base.

⌨

- **Select** Yes as the answer for "Military Training."
- For the **Branch, select** NAVY**. Select** E3 as the **Rank.**
- For the **Rate or MOS, enter** LS (LOGISTICS SPECIALIST)**.**
- **Enter** "07/2010" as the **Enlistment Date. Enter** "07/2014" as the **Discharge Date.**
- **Select** HONORABLE as the **Discharge Type.**
- In the **Skills & Training** field, **enter** *Worked in mail facility for a large naval base*.
- For "Are you eligible for any benefits from your military service?", **Select** Unknown.
- In the **Notes** field, **enter** *Brenda enjoyed sorting the various kinds of mail and packages. She felt it was a job that was important to the people who lived and worked at the base. Brenda has an appointment (fill in the date for next Tuesday) at the Waukesha County Veterans Service Office.*
- **Click** + Continue to save and go to the next page

Housing

Brenda is staying with her mother since she lost her apartment in September 2018 and she does not pay any rent. After she lost her job, she could no longer afford the rent. This violates her mom's lease agreement, and the landlord has given Brenda six weeks to move out. (She is being forced to move.)

Brenda had rented an unsubsidized apartment from July 2016-September 2018. She was not evicted from this apartment. Her rent was $500 per month.

Brenda's housing situation is uncertain and makes it hard to work or participate in work activities. She is interested in a referral for housing assistance.

🖥

- For the **Housing Situation** drop-down, **select** TEMPORARILY LIVING WITH OTHERS. Enter a **Begin Date** of 09/2018. The **Monthly Amount** is $0.
- **Answer** Yes, she is "at risk of being evicted or forced to move."
- In the **Details** field **enter** *Staying with mother but must move out within the next six weeks.*
- **Click** on the + Add Housing Situation button. **Enter** information showing she previously rented (unsubsidized) from 07/2016-09/2018. She was not evicted, and the **Monthly Amount** was $500. In the Details field, enter *Brenda could no longer afford rent on the apartment after losing her job.* After completing the entry, **click** on the **save** (check-mark) button to save it.
- For the "Utility Disconnection" question, **answer** No, but **answer** Yes to the "Hard to work or participate in work activities" question.
- In the **Details** field, **enter** *Brenda needs to find permanent housing soon.*
- **Click** to add an action item to refer Brenda to Subsidized Housing in the **Action Needed** section. **Click** the edit button for the action to edit it. Assign it to the Worker, adding the Task of SEND REFERRAL INFORMATION TO THE HOUSING AUTHORITY OFFICE and a **Due Date** of one week from today. **Click Save** to close the box.
- **Click + Continue** to save and go to the next page.

Transportation

Brenda has a regular Wisconsin driver's license that expires 9/18/2021. She owns her own vehicle. It is currently registered and insured. She has never had a CDL.

- From the drop down of "Transportation Methods" **select** PERSONAL VEHICLE by clicking on it.
- **Click** on Yes to indicate that the "vehicle is both insured and registered."
- For "Valid driver's license," **answer** Yes. **Select** WISCONSIN from the drop-down for **State Issued**. **Enter** an **Expiration Date** of 09/18/2021.
- **Select** No to indicate that Brenda has never had a CDL.
- **Check** the box to indicate there is no **Action Needed**.
- **Click + Continue** to save and go to the next page.

Legal Issues

Brenda has no misdemeanor or felony convictions, no pending charges, no restraining orders, no family members with legal issues; and does not have any upcoming court dates.

- **Answer** No for all questions based on the scenario information.
- **Check** the box to indicate there is no **Action Needed**.
- **Click + Continue** to go on to the next page.

📄 **PG Page 57**

Brenda does not have any issues with physical health.

She has been seeing a therapist since January 2018 for depression and anxiety concerns. She believes it makes it hard for her to work or participate in W-2 activities. She left her job at Park Care due to stress and anxiety. She sees her therapist weekly and is taking medications.

Brenda reports no AODA issues, cognitive or learning needs, and says she is not dealing with any domestic abuse situations.

🖥️

- **Select** No for both Physical **Health** questions.

- For the **Mental Health** questions, **select** Yes for the question, "have you ever met with a counselor or psychiatrist." In the **Details** field, **enter** *Meets weekly with therapist since January 2018*.
- **Select** Yes for the question about "having mental health conditions." In the **Details** field **Enter** *Diagnosed with depression and anxiety.*
- **Select** Yes for the question about "conditions making it hard to work or participate in activities." In the **Details** field, **enter** *she had to leave her last job due to the stress and anxiety*.
- **Select** Yes for the question about "currently seeing a counselor or take medication." In the **Details** field, **enter** *Sees a therapist weekly and takes medication daily*.
- **Note** the FEP and Brenda agree that this issue may impact participation and Brenda is already in treatment. This means it is appropriate to create a Mental Health barrier.
- **Click** the **+ Add Barrier** button.

_____

__Barrier Details__

_____

Brenda has a mental health barrier with depressive and general anxiety disorders. The onset date is January 2018.

Her most recent assessment report was 10/07/2018 by Maria Mendez, PhD. The report states Brenda is in ongoing weekly therapy for anxiety and depression disorders. She takes medications daily. The treatment is expected to continue for more than a year. Brenda is due for reassessment on 03/07/2019.

The e-mail address for Dr. Mendez is maria@communitytherapyassociates.com. Her phone number is 262-455-5151. Brenda signs a release of information (ROI) form while she is meeting with you.

Based on the assessment, Brenda needs an accommodation of flexible scheduling for work activities.

🖥️

- The **Barrier Type** defaults to MENTAL HEALTH on the detail page. **Select** both the DEPRESSIVE DISORDER and GENERAL ANXIETY DISORDER sub types from the **Barrier Subtype** drop-down. **Mention** that we can enter more than one subtype because the onset date is the same for both.

- **Enter** an **Onset Month** of 01/2018. In the **Details** field, **enter** *Diagnosed in January 2018. Treatment is ongoing with medications and weekly therapy.*"
- **Click** to add a **Contact. Select** the **Contact Title** as TREATMENT/ASSESSMENT PROVIDER in the field next to it. Remember, choosing this **Contact Title** means the contact information is confidential.
- **Enter** DR. MARIA MENDEZ, PHD as the name, maria@communitytherapyassociates.com as the **Email,** and 262-455-5151 as the **Phone**. **Indicate** an ROI was signed on today's date.
- **Click Save** to close the **Add Contact** dialog box.

- For the **Referral Date, enter** 10/07/2018 and **note** in the **Details** the *referral was previously completed*. (Note that Brenda has provided us with the most recent report from her therapist, dated 10/07/2018. Because that information is current and is being used, enter it in the **Referral Date** field.)
- For the **Assessment Date, enter** 10/07/2018. In the **Details** field, **enter** *Most recent report from therapist*.
- In the drop-down for "how long the symptoms will likely last" **select** 1 YEAR OR LONGER. In the **Recommended Reassessment Date** field, **enter** 03/07/2019.
- In the **Details** field, **enter** *Next assessment with therapist due in March 2019.*

_____

- **Note to trainer**: We are not entering anything for **Hours the individual can participate.** If anyone asks, you can explain that, like Sandra's assessment, no information was given from the provider to indicate any hourly restrictions.
- **Click** the Search (magnifying glass) button in the **Contact** field. **Select** Dr. Mendez from the list of contacts that appears as the assessment contact.

- **Indicate** "Accommodations are needed" by clicking Yes.
- From the **Accommodations for** drop-down, **select** PANIC/ANXIETY. **Enter** a **Begin Date** of today's date. **Enter** *Flexible schedule* in the **Details.**
- **Click Save and Exit** to return to the **Participant Barriers** page.

- **Select** No for both AODA questions.
- **Select** No for all the **Cognitive and Learning Needs** questions.
- **Select** Yes to **Display Next Section. Select** No as the response for each of the questions, as the participant is not experiencing any domestic abuse issues.
- **Click + Continue** to save and go to the next page.

Child and Youth Supports

Brenda's 4-year-old son, Quinn Carmichael, is in an informal child care arrangement. He does not have any special needs. He stays with his Grandmother when Brenda needs him to. Brenda intends to continue using this arrangement.

The family receives WIC but does not participate in Head Start. The family is not involved with child welfare.

Brenda wants to apply for Wisconsin Shares.

- For "Children 12 or under" **answer** Yes. **Enter** Brenda's son, QUINN CARMICHAEL (born in 2015), with an INFORMAL **Care Arrangement**. Quinn does not have "special needs." In the **Details** field, **enter** *Stays with Grandmother when needed.*
- **Answer** No for "Children 13-18 with special needs."
- **Indicate** the family does receive WIC but does not participate in Head Start.
- **Answer** No Quinn does not have a "child welfare worker."
- **Indicate** no "changes with child care in the near future."
- **Click** to add an action item in **Action Needed** for referring Brenda to Wisconsin Shares. **Click** the **edit** button. Assign the task to the Participant. The task is to A*pply for Wisconsin Shares at the Income Maintenance (IM) agency*. Give a **Due Date** two weeks in the future. Assign it a high priority. In the **Details** field, indicate *Follow up with the FEP when eligibility for Wisconsin Shares is established. Here is the website and phone: https://access.wisconsin.gov or 888-555-1111.*

- **Click Save** to save the contact information.
- **Click + Continue** to save and go to the next page.

Family Barriers

Neither Brenda nor anyone in her family has applied for SSI/SSDI, and she is not interested in learning more about it.

Brenda has no caretaking responsibilities for a family member with special needs. No one in the household engages in risky activities, has behavior problems, or is facing suspension or expulsion from school. There are no other issues with the family.

⌨

- **Answer** No for all the questions on this page based on the scenario information.
- **Indicate** that there is no **Action Needed**.
- **Click + Continue** to go on to the next page.

Non-Custodial Parents

📄 **PG Page 58**

Brenda is not an NCP.

⌨

- **Answer** No for "Do you have any children 18 or under who live with another individual most of the time?"
- **Click + Continue** to go on to the next page.

NCP Referral

Quinn's father, Addison Carmichael, does not live with Brenda. Addison works and pays child support. Brenda is sure he does not want to participate in a work program and chooses not to provide his contact information.

Addison sees Quinn 1-2 times per week in the evening. He is ordered to pay $300 per month in support.

⌨

- For the question "Do you have any children age 18 or under whose other parent isn't living with you?" **answer** Yes.
- **Enter** the name ADDISON CARMICHAEL as the **Other Parent. Indicate** Addison is presently "working or available for work."
- In the **Details** field, **enter** *Addison is working and paying his child support.*
- **Indicate** Addison is not "interested in participating in a work program."
- **Indicate** Brenda does know how to contact Addison. **Leave** the contact field blank.
- **Enter** QUINN as the **Child**. In the drop-down, **select** that Addison has contact with him 1-2 TIMES PER WEEK.
- **Indicate** there is a "child support order" for $300 per month.

- Click **+ Exit** to go to the **Informal Assessment Summary** page.

Informal Assessment Summary

📄 **PG Page 59**

Review Brenda's summary to ensure all your entries match the scenario information.

*When the trainer gives the go ahead you can click the **Submit** button to submit the completed assessment.*

💻

- **Review** Brenda's informal assessment summary page. **Scroll** through the sections and note the major points of information for each one. Learner entries should match yours. Have them evaluate their own cases as you scroll through the information.
- **Check** that all pages on the navigation list show green check-marks. If they don't, assist learners to find any errors they made.
- After all learners have completed assessments with no errors, **click Submit** to submit the informal assessment.
- **Click Continue** to return to the **Informal Assessment Summary** page.
- **Click** on the **Case Management** navigation toolbar and then select the **Action Needed** app.
- **Remind** learners of the tasks that must be completed after an informal assessment – like reviewing needed actions. We are not logging in to CARES mainframe in this class, but in the real world, PIN comments **must** be entered on CMCC to summarize the outcome of the informal assessment and decisions made about the participant's employability.
- **Point out** the list of tasks in their PG.

Brenda's assessment is complete

Pat yourself on the back, give yourself or your neighbor a high five for a job well done. You can now log out of WWP.

Day 1 Wrap Up

📄 **PG Page 60**

Today we showed you informal assessment in WWP and you got to complete an assessment along with us.

Ask learners to think about everything we covered throughout the day and to look back at their notes. **Tell** learners to write the following next to each symbol:
- **Triangle** – three important points from today's class.
- **Square** – anything that "squares" with their thinking or that they agree with.
- **Circle** – anything that is still "circling" in their head or that they have questions about.

Give class 5-10 minutes to complete.

Ask for volunteers to share any points they wrote down, especially for the circle.

Tomorrow we will show you some additional features of WWP and you will complete another informal assessment independently.

We will start promptly at 9am – See you then!

Day 2 Opening

Welcome back! We have several features of WWP to cover before we give you time to work independently on another Informal Assessment in WWP.

Before we get started, let's take another look what you entered for your Triangle, Square, and Circle closing activity yesterday.

Ask: As you review your responses, do you have anything you want to add or change?
Ask: Could a couple of you share your thoughts?

Now, I'll move us back in to WWP to show you some features beginning with WWP Apps.

WWP Apps

Note to Trainer: This is a walkthrough. Use the PIN for Brenda that you created earlier. Learners are not following along with the entries in this section.

Action Needed

📄 **PG Page 61**

Let's look at where to find some of the entries we created for **Action Needed**, **Work History**, and **Contacts** outside of the driver flow. We can access those items in "apps" within WWP.

🖥 Using the **Case Management** navigation toolbar in the header, **click** on the **Action Needed** app.

This app displays all Action Needed items recorded on any page of the informal assessment. It allows you to update previously entered items and enter additional worker or participant tasks.

Benefits of this app include:
- A printable task list is available for the participant.
- You can check off completed tasks when accomplished.

Walkthrough

To add a new item, click the **+ Add Task** button.

If there are multiple tasks listed, use the **Search** field to find a specific one. You also can apply **Filters** to the list that affect how tasks display. The filter drop-down lets you select more than one type of Action to display. Only tasks included in the filter options will be displayed.

🖥 **Click** the **Sort By** field, not the arrow, for **Participant Tasks**. Unlike filters, sorting affects only the order in which the tasks display. You can sort by Page, Priority, Completion Date, and Due Date. The default sort is Due Date. **Click** the arrow in the box next to the sort order. Clicking this arrow lets you set the sort order to either ascending or descending. This is true for both worker and participant tasks.

🖥 **Click** the print button under participant tasks. **Click** the open button to open the pdf. Notice the printed list displays the task, due date, priority, and details. It is important for you to describe the task in detail because the page name and action item name do not display.

The circle to the left of each task is a quick way to indicate that it is complete. Clicking the circle displays a green check-mark and fills in the current date as the **Date Completed** for that task**.**

You also can edit or delete a task using the buttons.

⌨   **Click** on the **Edit** button (the pencil icon) for one of the tasks to show the **Edit Task** dialog box. You can change any applicable field for the task. You can backdate completion dates or even change a task previously marked as complete to incomplete. **Click** Cancel to exit that view.

So, let's add a new item for Brenda.

💻   ***Trainer Demo Entries***

- **Click** the + Add Task button.
- **Select** a **Worker** task**.**
- **Click** the drop-down for **Page** to show the different choices. **Select** HOUSING.
- **Click** the drop-down for **Action Item** and **select** OTHER.
- For the **Task, enter** *Get ROI Form signed by Brenda* and a **Due Date** a week from today**.** Due dates must be within the next six months. At this time, no alerts generate regarding these due dates, but future updates to WWP likely will add that functionality.
- In the **Details** box enter *Need ROI to coordinate with Housing Office.*
- **Click** Save and **note** that the task has been added to the Worker list.
- **Ask** learners if there are any questions on the app before continuing.

Participant Barriers List

📄 **PG Page 62**

💻   Using the **Case Management** navigation toolbar in the header, click on the **Participant Barriers** app.

This app displays a list of all barriers entered for a participant. Barriers can be edited, deleted, or added without going to the **Participant Barriers** page with the informal assessment.

The app view benefits for case management include:
- All barriers of all types are viewable in one list.
- Both open and closed barriers can be displayed.
- Update barriers easily based on formal assessment results or new accommodations needed.

Ask Are there other benefits you can think of?

*** Only the assigned FEP for this participant and his or her Supervisor can access this app. ***

Walkthrough

Like the **Action Needed** app, there is a search function to find a specific barrier.

You can sort barriers in ascending or descending order by onset month. You can apply a filter to show only barriers of a certain type. The drop-down lets you select more than one type.

💻   **Click** the **Filter by Barrier Type(s)** drop-down to show the available choices.

By default, the list includes any closed barriers, but you can click on the button to change that.

Use the buttons to edit or delete a barrier.

💻   **Click** the Edit button to open the **Participant Barrier** detailed view. This is the information we entered previously about the barrier. From this view, you can click Save and Exit, or click on the X in the upper left corner of the page if you have not made any changes. **Click** the X to close the page.

⌨️   **Click** the + Add Barrier button. This opens a blank barrier page. The **Barrier Type** drop-down lets you select any type of barrier. **Click** the drop-down to show the available choices. Barriers entered here display on the **Participant Barriers** page in the informal assessment as well. **Click** the X in the upper left corner of the page to exit without saving any information.

- **Ask** learners if there are any questions on the app before continuing.

Test Scores

📄 **PG Page 63**

⌨️   Using the **Case Management** navigation toolbar in the header, click on the **Test Scores** app.

This app displays scores from any GED/HSED test, Education Level test (TABE) and ESL/ELL tests (TABE CLAS-E/BEST). GED/HSED scores entered from the **Education History** page in the informal assessment display here. You also can enter GED/HSED scores here. You can enter TABE/TABE CLAS-E/BEST scores only through the app.

The app enables you to:
- Easily review educational progress and/or English proficiency levels in one place.
- Quickly enter updates and new scores.

Walkthrough

If no scores are entered, the page is blank. To add a new test, click the **+ Add Test** button.

Let's enter some TABE scores for Brenda.

⌨   *Trainer Demo Entries*

- **Click** on **+ Add Test.**
- **Click** on the **Test Type** drop-down to show the available choices. The choices are based on input from local agencies. **Select** TABE 9&10.
- **Enter** a date last week for the date taken.
- **Enter** the following test scores:
  o **Reading** (Brenda did not take the Language test) – Version 9, Grade Equivalency 7.6, Level M (medium)
  o **Math** – Version 9, Grade Equivalency 6.9, Level M.
- **Trainer Note:** If asked about the NRS field, explain that we are not entering NRS (National Reporting System) levels in this scenario. This is an adult education measure used by workforce agencies that administer WIOA and other federal programs that measure adult education outcomes. At this time, it is not required for W-2.
- **Click** the **Save** button. The scores now display on the **Test Scores** page. Note the tabs for the type(s) of tests above the score view. If you enter other types of tests, more than one tab displays at the top.
- **Ask** learners if there are any questions on the page before continuing.

Work History List

📄 **PG Page 64**

🖥️   Using the **Case Management** navigation toolbar in the header, click on the **Work History** app.

This app lists all the participant's jobs entered on the **Work History** page or entered previously in CARES. Jobs can be edited, deleted, or added in this app.

The benefits for case management include:
- The listing of jobs is viewable in one place. Patterns are easier to recognize.
- Quickly edit or add a job without going to the **Work History** page in the informal assessment.
- Use the work history listing to build a resume or complete an employment application.

Walkthrough

If no jobs are entered for the participant, this page is blank. For a participant previously enrolled in CARES within the last seven years, all jobs entered in CARES display as well as any jobs entered in WWP.

Like the previous pages, there is a search function to find a specific job. You also can sort the jobs by begin date in ascending or descending order.

Use the buttons to edit or delete a job.

To add a job, click the **+ Add Work History** button.

Let's add another job to Brenda's work history.

⌨   ***Trainer Demo Entries***

- **Click** the **+ Add Work History** button.
- For the **Job Type, select** UNSUBSIDIZED**.**
- For the **Begin Date, enter** 06/02/2013 and 04/21/2015 as the **End Date.**
- The **Position** is CASHIER and the **Company** is PEWAUKEE CORNER PUMP**.**
- **Start Typing** PEWAUKEE as the City and wait for the system to prompt you with PEWAUKEE, WI, USA. **Click** to populate it in the box.
- In the **Job Duties** field, **enter** *Waiting on customers, running cash register, cleaning floors, stocking shelves.*
- For the **Reason for Leaving, select** FIRED from the drop-down**.**
- In the **Details** field, enter *Lost job for poor attendance.*

- For the **Pay Type, select** HOURLY WAGE from the drop-down**.**
- **Enter** 26 as the **Avg Weekly Hours**.
- **Enter** $8.00 per hour as the **Beginning Rate** and **check** the box under **Ending Rate** to indicate that there was No Change**.**
- **Click** the **Save & Exit** button. **Note and correct** any errors on the page.
- This job now displays on the **Work History** list page. It also displays on the **Work History** informal assessment page.

- Now that there are two jobs, I'll demonstrate the **Search** field.
- **Begin typing** PARK CARE in the search field. WWP narrows the list. **Remove** that from the **Search** field and **type** in CASHIER. Now the list shows the other job. The **Search** feature finds the best match(es) based on whatever you type in it.

Contacts

📄 **PG Page 65**

🖥️   Using the **Case Management** navigation toolbar in the header, click on the **Contacts** app.

This app lists all contacts entered in WWP for a participant. Contacts can be edited, deleted, or added in this app.

This feature has a couple of key benefits for case management:
- All contacts for a participant are organized in one place.
- Contacts are easily searchable and updateable.

Walkthrough

If no contacts are entered, this page is blank.

Like previous pages, there is a search function to find a specific contact. You can sort contacts by first name or title in ascending or descending order.

Use the buttons to edit or delete a contact.

To add a **Contact**, click the **+ Add Contact** button.

Only Treatment/Assessment provider contact types are confidential.
Do not enter any confidential information when creating other types of contacts.

Now, we'll enter another contact for Brenda.

📟 ***Trainer Demo Entries***

- **Click** the **+ Add Contact** button**.**
- For the **Type, select** OTHER from the drop-down**. Enter** *church volunteer* in the field next to it.
- For the **Name, enter** SHARON HELPKE**.**
- **Enter** a phone number: 262-233-1999.
- **Indicate** that the ROI has been signed and **enter** today's date.
- In the **Details** field, **enter** *Has been helping Brenda with resumes and job interviews*.
- **Click** the **Save** button.
- As you can see, the contact displays now in the **Contacts** app.
- **Ask** learners if there are any questions on the page before continuing.
- **Click** the **Case Management** navigation toolbar and **select** the **Informal Assessment** icon to go to the **Informal Assessment Summary** page.

Independent Entry– Janae

📄 **PG Page 66**

Note to trainers:

Learners complete the entries for this scenario in the training environments for CWW and WWP. Note that there are places where they are instructed to stop making entries and have a trainer check their work before continuing. They also may ask questions.

Field-by-field entry instructions are not given, just the relevant information for each page in the Informal Assessment driver flow. Learners work at their own pace. After they have completed the entries successfully, give them permission to experiment with this PIN in WWP, making any entries they like until everyone in the class is done with the entries.

Allow 45 minutes for independent entries for the Janae case.

The **Trainer's Notes Appendix** contain the scenario information given to learners (*in italics*) plus notes on what to look for when checking their entries at the stop points.

Directions for Learners (read this to the class):

You are entering an informal assessment, on your own, for Janae. The information you need to enter Janae's informal assessment is in your participant guide. Complete the entries for Janae in the training environments for CWW and WWP.
Note: there are places for you to stop and have one of us check your work before you continue. If you have any questions, feel free to ask. You will begin your entries for Janae with Client Registration in CWW Training.

Client Registration/Application Entry

You are working with Janae who has two children, Martin (D.O.B. 9/18/2002) and Maya (D.O.B. 7/15/2015). Client Registration is done in CWW Training, for Janae _____. She was born in 1984.

She lives at 730 N. 29th St., Apartment 207, Milwaukee, WI 53208. Her cell phone number is 414-998-1318.

After Client Registration is complete, Application Entry is completed through the **W-2 Request** page. Learners enter their FEP ID, refer Janae to WWP from that page and record her PIN.

Learners are directed to stop before continuing to WWP to enroll Janae. **Verify** the learner recorded Janae's PIN in their PG page 62. **Observe** the learner finding her PIN in WWP and enrolling her, making sure she is properly assigned to the learner's worker ID. Learners then may continue on their own until the next stop point.

WWP Entries

📄 **PG Page 67**

Languages

Janae reads, writes, and speaks English. She says she took some Spanish classes in high school, but doesn't feel fluent reading, writing, or speaking the language.

Work History

Janae is employed part-time at Walgreens, 3522 W. Wisconsin Ave., Milwaukee, WI 53208. She is a Customer Service Associate working primarily as a cashier and works 15 hours per week. She has been there since November 2018 and earns $9.00 per hour, the same as her starting wage. She does not receive paid time off nor health insurance. She states that she found the Walgreens job on her own. It was the first one she could find after the coffee shop closed, but it's not something she sees as a career path. She was working more hours when she started the job (35 per week) but they cut her back to 15 hours per week as of January 3. Now she typically is scheduled to work on Tuesdays, Thursdays, and Fridays from 12:00 pm – 5:00 pm. She would really like to work full-time but needs to have something close to her home.

She worked previously as a waitress at the Northwest Coffee Shop (2308 W. Wisconsin Ave. Milwaukee, WI 53233) from March 2017 until the shop closed in September 2018. New owners took over, remodeled it to a high-end café, and brought in a whole new staff. She worked full-time, 40 hours per week, at Northwest Coffee and made $3.00 per hour plus tips the entire time she worked there. She received paid time off and health insurance. She said hotel guests were quite generous and she averaged $400 per week in tips. She really liked working with the owners of Northwest Coffee. They were giving her more responsibilities like training new staff and helping with food ordering. She was very sad when the shop was sold, and the new owners did not keep any of the old staff.

*(Remember – when entering more than one wage type, select each type in the **Pay Types** field, then calculate a total weekly amount for the **Begin Rate** and **End Rate** fields. You must list the breakout of the wages in the **Notes** field.)*

STOP — Learners are instructed to stop after completing the **Work History** page and have a trainer check their entries. You are checking only the **Work History** page currently. Give feedback to learners on the following key items. Allow them to make corrections and have the page re-checked for correct completion.

Key items to look for:

- Janae is employed part-time.

- An entry in the **Details** field for what is keeping her from working full time. It should say that Walgreens was the first job she could find after the coffee shop closed. It also should note that her hours at Walgreens have been reduced recently.
- Two entries for Work History: the current job at Walgreens and a past job at Northwest Café. **Click** on the details of each of those jobs to ensure that information entered matches what they were given (wages, hours, dates etc.)
- For Walgreens:
  - o Begin date of November 2018 and currently employed.
  - o No benefits offered.
  - o She found the job on her own.
  - o Most recent wage/hours effective 1/3/19 15 hours per week at $9 per hour.
  - o There should be an entry in **Wage/Hours History** for her original 35 hours per week effective November of 2018.
  - o Information in the **Notes** field that Janae does not see the Walgreens job as a career path.
- For Northwest:
  - o Her **Duties** at Northwest Coffee include the extra responsibilities listed in the scenario. Her reason for leaving is that the café closed, with **Details** entered about the new owners not retaining any current staff.
  - o She did receive paid time off and health insurance.
  - o Her **Begin Rate** and **End Rate** for Northwest Coffee show a weekly wage of $520 with comments in the **Details** or **Notes** field indicating she received $3.00 per hour plus $400 in tips per week.
  - o **Notes** at the end include information about how Janae enjoyed working with the owners at Northwest Coffee and the extra responsibilities they gave her.
- **Notes** at the bottom of the **Work History** page indicate that Janae wants full time work but needs something close to her home.

📄 **PG Page 68**

Work Programs

In December 2018, Janae applied for help from the WIOA Adult program to get training in hospitality management but is currently on a wait-list. Employ Milwaukee (the WIOA program operator) referred her to the W-2 agency for possible assistance while she is waiting.

Her WIOA Case Manager is Elizabeth Carter, 2342 N. 27th St., Milwaukee, WI 53210, (414) 270-1700.

Education History

Janae earned her HSED from Milwaukee Area Technical College in January 2005. She last attended Bay View high school in Milwaukee in 2001 and had completed her junior year. When asked, Janae comments that she was a good student, but felt she couldn't focus on school when she got pregnant with Martin.

Post-Secondary Education

Janae attended Milwaukee Area Technical College after getting her HSED. She completed two semesters of an Associate Degree in Culinary Arts (25 credits) but didn't go back after the spring semester 2006. She says she had some relationship issues and wound up leaving town for a while. Now, she is more interested in the management of restaurants than in cooking. She did not complete any degrees or certifications.

Military Service

Janae never enlisted in the military.

Housing

Janae has lived in her current apartment for 3 years. Her rent is $127 per month as she receives Housing Assistance (Section 8).

She is not at risk of eviction or of having utilities disconnected, and her housing situation does not impact her ability to work or participate in work activities.

*(Remember – on pages with an Action Needed list, you **must** check the No Action Needed box when no actions are needed, or WWP considers the page incomplete.)*

📄 **PG Page 69**

Transportation

Janae has a regular Wisconsin driver's license that expires 05/18/2022. She does not have a car, uses public transportation, and is able to get to all the places she needs to go. She has never held a CDL.

Legal Issues

Janae has never been convicted of a misdemeanor or felony, has no pending charges and no restraining orders. Her son, Martin, has had some problems with minor offenses and has been involved in the juvenile justice system. He currently is involved with a Youth Offender program and is complying with the requirements. If he keeps complying for another three months, his record will be expunged. He has no upcoming court dates.

STOP Learners are instructed to stop before continuing to the **Participant Barriers** page. **Check** the entries for the **Legal Issues** page, making sure there is an entry in the **Details** field relating to a family member with legal issues. Also, **check** that the information from the scenario about minor offenses, the Youth Offender program, and potential expungement of his record are included.

Participant Barriers

Janae does not have any issues with physical health, mental health, AODA issues, cognitive or learning needs, and is not dealing with any domestic abuse situations.

Child and Youth Supports

Janae's daughter Maya (D.O.B. 7/15/2015) is under 12 years old. She attends a licensed child care facility. She does not have any special needs.

Her son Martin is over 12 and does not have special needs.

The family receives WIC, and Maya is enrolled in Head Start. Neither of the children has a child welfare worker.

Janae receives Wisconsin Shares. She does not anticipate any changes in her child care in the near future.

Family Barriers

Neither Janae nor anyone in her family has ever applied for SSI/SSDI, and she is not interested in learning more about it.

Janae has no caretaking responsibilities for a family member with special needs. No one in the household engages in risky activities, has behavior problems, or is facing suspension or expulsion from school. There are no other issues with the family.

📄 **PG Page 70**

Non-Custodial Parents

Janae has a child who does not live with her most of the time.

The other parent of the child is Greg Jones. She has contact with him 1-3 times per month and does not want to change anything about her relationship with him.

The child's name is Marcus Jones. His date of birth is 1/1/2012. There is a child support order in place. She has contact with Marcus 1-2 times per week. He comes over after school on Wednesdays and stays overnight every other weekend.

There are no other adults caring for Marcus. Janae does not want to change anything about her relationship with Marcus and he is not in need of any services.

The monthly child support ordered is $100 and she does not owe any back child support. Janae is not interested in any child support nor visitation services.

NCP Referral

Martin's father, Jerome Jackson, currently is incarcerated and not paying Child Support. He is court ordered to pay $55/week. He has no contact with Martin or Janae.

Maya generally visits her father, Harmon Warner, every other weekend. Per the court order, he was paying $65 per week regularly for child support until two weeks ago. He lost his job, and Janae gives his contact information as she thinks he might appreciate some assistance in finding new employment.

He lives at 3805 N. 76th St., Apt. 4, Milwaukee, WI 53222. His cell phone number is 414-355-5454.

Learners are instructed to stop before submitting the informal assessment. Review the **Informal Assessment Summary**.

Key items to look for:
- The navigation menu on the left has green checkmarks for each page.
- **Languages** – a note about Janae taking Spanish in high school.
- **Work History** – already reviewed.
- **Work Programs**
  - Waitlisted for WIOA adult program.
  - **Details** and/or **Notes** explaining interest in training for hospitality management and referral for W-2 from Employ Milwaukee.
  - Contact entered for her Case Manager.
- **Education History** – a note about getting HSED through MATC in Milwaukee.
- **Post-Secondary Education**
  - Information on her attendance at MATC
  - **Details** indicating it was a Culinary Arts program
  - **Notes** regarding why she left school and her current interest being in management, not in cooking.
- **Housing** – date and rent amount from scenario, plus **Notes** indicating she gets section 8 rental assistance. No action needed.
- **Transportation** – uses public transportation and has current DL. **Action Needed** to provide transportation assistance (bus passes).
- **Legal Issues** – already reviewed.
- **Participant Barriers** - No barriers. Ensure all questions were answered and not refused.
- **Child and Youth Supports** – Child care at a licensed facility. Maya gets WIC and Head Start. No action needed.
- No **Family Barriers**.
- Janae is an NCP and the information about Greg and Marcus has been entered. There are no referrals for services.

- **NCP Referral**
  - Jerome – no referral. **Details** indicate that he is incarcerated.
  - Harmon may be interested. **Details** indicate he recently lost employment. His contact information is entered. Child support amounts listed for both children.

Instruct learners to make any corrections or updates needed before submitting the assessment. **Observe** learners submitting the assessment. **Remind** learners they can make edits and try other features in the WWP informal assessment using this PIN while waiting for others in the class to finish.

<div align="right">

Janae's Informal Assessment is complete

</div>

You have completed entries for two informal assessments in the WWP training environment. Excellent job!!

Self-assessment

Now, let's do a self-assessment:

On a scale of 0-10 with 0 being "not at all ready" and 10 being "I am 100% ready for the next challenge" how ready would you say you are to enter your next training cases?

By a show of hands, do we have any 9s or 10s in the room? If we do – great! If not, that's OK too. We know you are learning the system and it will take time and practice to feel more comfortable.

How about those from a 5 to an 8? That's right on target. The extra practice you get in the scenarios after class will cover some extra items we didn't necessarily talk about in class and build on your learning.

If you rated your readiness at 4 or lower, that is OK too. We all learn at different paces and we certainly don't expect you to be an expert in WWP yet. The after class practice will definitely help you build your knowledge and confidence in WWP. Don't be afraid to ask questions back at your office too. Everyone is learning this new system together.

Alternative approach to this self-assessment activity
1. Ask to stand as they are able or raise their hands, move a little, stretch a little.
2. Ask the learners to rank their WWP readiness on a scale of 1-10, 1 not at all ready to 10 you are ready to hit the ground running.
3. Explain that the trainer will count from 1-10 and as you hear the number that you ranked yourself you can sit down or put your hands down.

Summary
However, you rated your readiness you are continuing to build the foundation for WWP and deserve a pat on the back so reach your hand over your shoulder if you're able and pat yourself on the back. And state I have done a great job so far!

After this class, you will make entries in WWP Training for three additional cases.

Before we complete our training today, we have a few other items about WWP we need to discuss.

Other WWP Notes

Reassigning a Participant to Another Worker

📄 **PG Page 71**

🖥️   **Log in** to WWP on the trainer computer (if you're not logged in already) and project the home page on the screen.

WWP allows you to reassign a participant's case currently assigned to you to another FEP.

Walkthrough:

🖥️   Find Sandra's PIN that you were working with earlier from your recently accessed PINs or using the Search. Navigate to the **Participant Summary** page. **Click** the Reassign Worker button.

The **Reassign Worker** dialog box opens. The **Program** field auto-populates based on the program the participant is enrolled in and the worker's security profile. From the **FEP ID** drop-down, you can select any other FEP in your Contract Agency and assign the participant's case to that worker.

Note that the FEP ID also changes automatically in CWW (on the **W-2 Request** page). Because FEPs are assigned at the case level in CWW, all other PINs in that case also are assigned to the new FEP ID.

The automatic update also happens in WWP if the FEP ID is changed in CWW on the **W-2 Request** page.

🖥️   **Click** Cancel to return to the **Participant Summary** page.

Office Transfer

📄 PG Page 72

You also can access the Office Transfer button from the **Participant Summary** page. The transfer policy for W-2 has not changed and is as follows in the W-2 Manual:

Within the Boundaries of a Balance of State (BOS) Contract Agency – W-2 Manual 4.6.1.1

When a W-2 Participant moves to another area that still is served by your contract agency, you **must** transfer that participant to the Work Programs Office that serves that area.

Within Milwaukee County – W-2 Manual 4.6.2

When a W-2 Participant moves to another Milwaukee W-2 geographical area, your agency **must** transfer that participant to the other W-2 agency's eligibility (CWW) and work programs (WWP) offices.

For all transfers, the outgoing agency needs to complete the transfer to send the participant to the new agency. Before you transfer a participant to another agency/office in WWP, make sure you have followed all other processes your agency requires.

Walkthrough:
The transfer process requires two steps. One is transferring the participant in CWW. The other is to complete the transfer process in WWP. It does not matter which happens first, but both steps **must** be completed. Until the office numbers match in CWW and WWP, an error message displays in WWP. The error message does not prevent you from completing all the needed tasks in WWP prior to the transfer.

🖥️   On the **Participant Summary** page, **Click** the Office Transfer button.

The **Transfer Participant** dialog box opens. The **Program** field auto-populates to W-2. If the transfer was started in CWW, the Work Program Office field defaults to the office selected in CWW. The **FEP ID** field is not required and should be used only if you know the FEP who will work with the participant.

🖥️   **Click** Cancel to return to the **Participant Summary** page.

Remember, you can find reassigned or transferred participants by using the **Referrals and Transfers** and **Participants by Worker** tabs on the **WWP Home Page**. If a FEP is assigned to a new office when the transfer happens, the participant displays on the **Participants by Worker** tab. If a FEP was not assigned when the transfer happens, the participant displays on the **Referrals and Transfers** tab for the new office.

Note to trainers: If asked, this information is updated on CARES screen WPWI. However, workers are encouraged to find this information on the **Participant Summary** page in WWP.

Viewing History
Informal Assessment

📄 **PG Page 73**

The history view shows a "snapshot" of each informal assessment page at the point in time it was saved. If a page has multiple saved updates, you can scroll through them chronologically or select a specific date to view. You can view history only for pages that you have access.

You can see how information on an assessment page has changed over time. There is a record of each time a page is updated and who made the updates.

WWP creates a history entry for assessment pages each time a page is saved. Each saved version of the page is part of the history that you can view by clicking the History button.

Walkthrough:

Note to Trainer: Use the following case to show history entries:
Mariana Spain PIN 1204759545

Use the **Transportation** page to show a series of historical entries for this participant.

🖥️   **Return** to the **WWP Home Page** and access the demo PIN. **Navigate** to the **Informal Assessment Summary** page and **click** on the History button for the **Transportation** page.

Initially, the most recent version of the page displays. Note the screen shows the date and time it was last edited and the name of the person who made the last edit.

There are two ways to navigate through the history of pages. Arrow buttons allow you to "scroll" chronologically through entries.

🖥️   **Click** the buttons to demonstrate this.

The second way to navigate the history is by using the drop-down box to select a specific date/time to view.

⌨   **Click** on the drop-down to show how the saved versions of the page display.

On the **Child and Youth Supports, Legal Issues, Family Barriers** and **Non-Custodial Parent** pages, there are certain fields that require a reason when deleting an entry. The history of those delete reasons is not displayed in the history but will be added in a future WWP update.

Items that are saved as part of an embedded app (Work History, Contacts, Action Needed, Participant Barriers and Test Scores) display the details only on the most recent entry on the associated informal assessment page. There is a separate way to view the history of apps.

Apps

📄 **PG Page 74**

Contacts, Test Scores, and Action Needed are apps that track the date, the time, and the name of the user who made the most recent update. This is the extent of history that is viewable for these apps.

For Participant Barriers and Work History, viewing history works like it does for the informal assessment pages. A "version" of each barrier or job is stored each time the record is saved. When you access a barrier or job, you can view the history for that item by using the arrow buttons to navigate or by selecting the date/time of the desired version from the drop-down. You also can view history for deleted jobs by selecting them from the list.

Disenrollment

📄 **PG Page 75**

When a participant is no longer receiving services or relocates to another Contract Agency that is not part of the transfer policy, he or she **must** be disenrolled from W-2.

Start the disenrollment process in CARES Mainframe by ending all W-2 activities. Next, end the W-2 placement in CWW. Run eligibility before ending the placement if the case is closing for an eligibility-related reason.

Remember to enter PIN level comments on CARES screen CMCC and Case level comments in CWW on the **Case Comments** page.

<div align="right">**Walkthrough**</div>

Trainer Note: Use your Sandra PIN from the first day of class to show this function.

Lastly, move to WWP and use the Disenroll button on the **Participant Summary** page.

⌨️   On the **Participant Summary** page, **Click** the Disenroll Participant button.

The **Disenroll** dialog box opens. If you did not complete the steps in CARES or CWW, errors display indicating you need to complete those tasks prior to disenrollment. If you have completed the steps in CARES and CWW, a message displays that the participant is eligible for disenrollment.

WWP automatically closes any open barriers/accommodations at the end of the month when disenrolling a participant.

To complete the disenrollment, you simply click the Disenroll button.

⌨️   **Click** the Disenroll button to disenroll Sandra.

After disenrollment, you can view the **Participant Summary** page and continue to update **Work History** unless the participant enrolls in W-2 with a different Contract Agency. For Milwaukee agencies, you can view participant data even if the participant enrolls with another Milwaukee W-2 agency. The only exception is any confidential information or confidential case.

📄 **PG Page 76**

It is possible for a participant to be co-enrolled in W-2 and Children First. When this happens, Children First information displays on the **WWP Home Page** and the **Participant Summary** page as shown in your Participant Guide.

When a participant is co-enrolled, two Case Managers can update the participant's informal assessment information in WWP. For example, either Case Manager's name may be displayed as making the most recent entry on a page. Do not delete any information from the system that you did not enter.

Co-enrollment also impacts transfers and disenrollment. If a participant is in referred or enrolled status for Children First in Milwaukee, you can initiate a transfer to another WP Office within Milwaukee. WWP displays a message indicating you must inform the Children First Case Manager that the participant was transferred. If a participant is in referred or enrolled status in the Balance of State, you cannot initiate a transfer. In this situation, you must contact the Children First Case Manager to disenroll the participant before the transfer.

Note to Trainer: If asked, Children First Case Managers cannot transfer participants.

Due to system limitations, a co-enrolled Children First participant **must** be disenrolled with W-2. You need to contact the Children First Case Manager to have him or her complete the CF disenrollment. When you disenroll the W-2 participant, a message displays indicating that you **must** notify the Children First Case Manager that he or she needs to create a new RFA for the participant.

Note that in Phase II of WWP, this process likely will be significantly improved.

Note to Trainer: If asked, a participant can be disenrolled from Children First without being disenrolled from W-2. In this situation, barriers remain open for W-2.

Next, we will be covering what you need to know about Implementation of WWP

📄 **PG Page 77**

There are few additional items and deadlines you need to know about when WWP goes live.

Data Migration:
At the time of implementation, some information for all participants enrolled in the last seven years will transfer to WWP.

This includes some informal assessment information. The following pages will contain some data transferred from CARES: **Languages**, **Work History**, **Education History**, **Post-Secondary Education**, **Military Service**, **Transportation**, and **Participant Barriers**.

Informal assessment information migrated from CARES to WWP displays in various fields of the informal assessment pages. The Notes field on the specific page will display a note indicating that information transferred from CARES. Informal assessment pages may appear incomplete because all the required fields could not be completed with the transferred data.

On the **Work History** page, a flag displays indicating migrated information. To update information for a migrated employment record, use the Work History link on the Case Management navigation toolbar. After you make an edit to a migrated employment record, you **must** complete all the required fields for the job. You are not required to edit past employment records.

Transitioning Current Participants:
Current participants enrolled in CARES **must** have a new WWP informal assessment completed within six months of WWP implementation.

If you need to complete a new informal assessment prior to that date, you **must** complete a full informal assessment in WWP. The informal assessment screens in CARES will no longer be updateable and will not reflect any changes made in WWP.

Within the first six months, individual pages of the informal assessment can be changed without completing the entire assessment, but WWP will indicate that other pages are incomplete.

Note to trainers: many questions have been raised by agencies and workers regarding the Date of Last Contact on WPWI. WPWI will be view-only. BWF is getting rid of date of last contact as a concept in general, and it no longer will serve any official function. Workers are encouraged to use the **Participant Summary** page in WWP to find information previously gathered from WPWI.

Communication between CARES and WWP:
Some information from entries in WWP is sent to CARES.

- When submitting an informal assessment, the transaction "Informal Assessment Completed" is recorded on CARES screen WPTN.

- When entering a job on the **Work History** page, the dates, wages and so on are recorded on CARES screen WPEH for processing of POP claims.

A note about CARES Mainframe and driver flows:

Now that the informal assessment driver flow happens in WWP, there is no longer a driver flow in CARES Mainframe. When you press Enter on the first page of the EP in CARES, **WPAS**, you will be driven to **WPJS** to complete the Employability Plan, but that is the only "driver" that will happen. You will have to navigate to other screens in CARES directly.

What do you know NOW about WWP? - Activity

Purpose: Review WWP knowledge from classroom learning, highlight positive aspects of the new system, and compile lists of challenges that learners can address in follow-up practice after class.

Materials: Answer sheet in PG, flip charts

Estimated Length: 20 minutes

Directions to Trainer: This is a 1-2-4-All activity. Give learners five minutes to answer the questions in the PG (note that two are the same as in the introductory activity, but they may have different answers now based on what they have learned).

Next, have learners find a partner and give them five minutes to share their responses. Then, have pairs find another pair and give them five more minutes to share.

After the groups of four complete their allotted sharing time, ask each group in turn to share a response to each question. Go at least two rounds for each question before moving to the next one. Compile responses on flip chart paper or in the Word document projected on the screen. Note takers can gather the information for us to compile and submit.

Pay attention to the areas where learners feel they need more practice. After class, practice scenarios should help with some of the issues, but if there are others identified, encourage learners to work with their Supervisor or ATL to find additional support opportunities.

🗎 **PG Page 78**

Trainer Instructions to Learners: Let's spend a few minutes discussing what you NOW know about WWP after completing this training. This will seem familiar, in fact the first two questions are those we asked you when we started the class. Maybe your answers are different now. We'll give you five minutes to write your answers to the questions.

1. What are you most excited about with WWP?

2. What do you think is your biggest challenge with WWP?

3. What is one key way you feel WWP will help your case management?

4. After this class, what will you need more practice on in the WWP system?

Now, find a partner and share your responses with each other. You have three minutes for this step.

Next, find another partner group (form groups of four) to compare notes. You have three minutes for this step.

Lastly, let's go around to each group and share an answer to each question that we can document on our class answer sheet.

What's Next?

📄 **PG Page 79**

Now you have completed the classroom portion of the WWP training, you'll have more opportunities to practice before it goes into production.

Within a few days, expect an email from the Learning Center Registration staff with information about the practice scenarios. There are three scenarios: one contains changes to Brenda's case and two new scenarios. If you have questions along the way, work with your ATL or Supervisor, or email the Partner Training Team.

Remember, we have been taking notes of questions that have come up during this class that we were unable to answer. Check the Q & A page for those answers when it becomes available.

Your partners in the Bureau of Working Families (BWF) appreciate your patience as you learn and become familiar with WWP Phase One with enrollment and informal assessment. Phase II is scheduled for late 2020 which will include Employability Plans, Activity Assignments and participation tracking. We have a lot to look forward to!

📄 **PG Page 80**

Please complete your evaluations before you leave. Enjoy WWP when it goes live on February 25!

Trainers Notes – Appendix One

Directions for creating Sandra's case in CWW Training

Client Registration

The participant name is Sandra _____. Date of birth 7/18/1994. Complete an RFA for W-2 only with you (the trainer who is doing the trainer demo) as the assigned worker.

Sandra lives at 955 S. Chestnut St. Apartment 1 in Platteville 53818. Her cell phone number is 608-933-1515. She has no other phone.

Application Entry

Add her two children: Zahara (age 7) and Adrian (age 3). They are full siblings.

Any needed verification is provided, VR codes are not critical information for this case.

Request only W-2. Sandra does get a rent subsidy. Refer Sandra to WWP.

The absent parent is James Mann.

They receive no other benefits.

You do not need to enter any assets nor income for Sandra.

Run eligibility and confirm W-2. Note Sandra's PIN in case you need it to locate her in WWP for enrollment during the class.

Trainers Notes – Appendix Two
Activities for Periodic Pauses

This is a collection of suggested activities to be used as energizers or as brief activities coming back from breaks.

Breathing Exercise

from https://momentousinstitute.org/blog/it-just-takes-30-seconds

Sit up tall, like your spine is made of a stack of pennies and put both feet on the floor. Close your eyes or look down. Imagine breathing in like you're smelling a flower (count four seconds). Now breathe out like you're blowing on a bowl of hot soup – carefully so as not to splash soup everywhere (count eight seconds).

Repeat three times.

Guided Meditation

from https://yoga.lovetoknow.com/Guided_Meditation_Script

Take a slow, deep inhale and a complete exhale.

As you begin awareness of your breath, start to notice what thoughts are going through your mind. What are you thinking about?

Do not get caught up in your thoughts, but just begin to notice them as they travel across your mind. Let them go as they pass and watch them come and go. Continue to breathe deeply.

I will begin to describe settings. Allow your mind to jump immediately to those settings. Let your mind be free to travel, and do not become attached to any one setting or image.

You are a traveler jumping from place to place in your mind. Now we will begin. An ocean. A deep, blue ocean. A beach with white sand. A seagull flying over the sand. Pelicans chasing the current over the waves. The waves crashing on the beach. The white sand. The desert. Cactus in the desert. Blue sky. Blue, cloudless sky. Birds singing. A walled garden. Lush, green grass. Storm clouds. A cool breeze. The crack of thunder. The dark sky illuminated by lightning. A long, dirt road stretching toward the horizon. A grove of olive trees. A farmer. A woman pulling water from a well. Children playing in the distance. A tall tree, stretching up to the sky. Blue sky. Warm sun. Mountains in the distance, topped with snow. A farmhouse. Sunset. White, puffy clouds. As the daylight wanes, a burning candle. Flickering flame. Dancing quietly.

Now take a slow, deep inhale.
Long, complete exhale.
Open your eyes.

Stretching Exercises

*From
https://www.eatsmartmovemorenc.com/FaithPlanningGuide/Texts/Ideas%20for%20PA
%20Breaks%20in%20Mtgs.pdf*

UPPER BODY STRETCH

Sit up tall in your chair or stand up. Stretch your arms overhead and lace your fingers together, turn the palms to the ceiling. Breathe out and stretch to the right. Take a deep breath in and come up to the center. Breathe out and stretch to the left. Place your arms back at your side. Take a deep breath in and lift your shoulders up to your ears. Breathe out and let shoulders drop. Repeat 3 times.
Put your hands behind your lower back and lace your fingers together, stretch your shoulders back, open your chest, keep your head in the center and look straight ahead. Relax.

NECK AND SHOULDER RELAXER

Turn your head to look over your right shoulder. Run chin down and across the chest to look over your left shoulder and return along the same path. Turn to the left and repeat on the other side. Slowly roll both shoulders backwards in large circles. Do four full circles. Place your hands on your shoulders and make large circles backwards with the elbows. Do four full circles.

LOWER BODY IN MOTION

Sit up tall in your chair, feet flat on the floor. Keep seated, lift your heels off the floor then put them back down. Repeat 5 times. Lift your right leg out straight in front of you, slowly point your foot (toes toward the ground) and hold for 10-15 seconds and flex your foot (toes toward the ceiling) and hold for 10-15 seconds. Rotate the ankle in a circle to the right, repeat several times, then rotate the ankle to the left several times. Put the right foot on the floor, lift the left leg and repeat.

Sentence Starters

Have poster paper around the room (if we are able) and have sentence starters on them. Take a few minutes and let learners get up out of their seats and move around. Maybe play music during this time. Some examples of questions we could have:

I am enjoying WWP because…
I am exciting by…
A case management benefit of WWP is…

Book, Movie, Song

Divide class into 3-4 groups.

Ask each group to choose one or two titles (book, movie, or song) which best describes the content of today's class and why they chose that title.

Do a quick report out.

Quick Questions

Ask one of these questions and have learners share responses:

- What is the coolest feature of WWP that you've seen so far and why?
- What page from the WWP informal assessment are you most looking forward to using with participants and why?
- Which informal assessment page in WWP is the easiest to use and why?
- Name something that is captured on a WWP assessment page that CARES Mainframe doesn't even have a field for.

Add other appropriate questions to this list.

One Key

Best if used towards end of day.

Divide class into 3-4 groups.

Tell each group to pretend that they are going to train a class on WWP. What is one key concept they would want to use in their training. If there is time, they could draw it out or conceptualize it somehow (this could also be a closing activity).

WWP Word Find
Find the hidden WWP terms.

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L  A  G  E  L  L  P  X  O  L  Q  Z  G  S  B  E  M  L  Y  J  O  P  N  Q  H
J  B  S  V  M  H  Q  F  K  C  I  L  C  R  E  V  I  R  D  B  H  Y  F  R  P
T  I  J  E  K  I  X  P  E  F  M  P  S  R  E  I  R  R  A  B  J  Y  L  D  M
S  E  M  K  U  R  L  K  L  P  I  D  C  D  C  N  O  I  T  C  A  G  P  Y  U
E  Z  L  P  C  S  H  I  R  E  W  J  N  G  F  H  Z  C  S  E  T  O  N  R  O
G  E  M  Z  O  W  S  A  T  P  J  W  K  G  S  W  S  E  M  S  W  U  H  O  G
A  T  H  S  N  Y  F  I  P  A  R  T  I  C  I  P  A  N  T  L  N  O  P  T  A
P  E  W  U  T  W  O  R  K  P  R  O  G  R  A  M  S  Z  X  I  O  A  S  S  D
T  W  P  I  A  N  K  G  Y  Q  L  Y  F  Q  I  Q  X  P  F  A  I  B  R  I  L
S  V  C  R  C  X  E  W  N  F  N  A  S  E  L  I  N  K  S  T  T  U  E  H  J
E  U  T  E  T  H  J  M  T  R  P  Q  N  E  O  L  C  T  U  E  A  X  F  K  P
T  U  V  O  S  N  B  I  S  P  K  I  E  G  R  F  W  B  R  D  T  V  E  R  H
Q  A  C  S  L  S  M  N  S  S  L  G  X  A  U  V  U  R  X  A  R  U  R  O  O
S  U  U  A  H  B  M  F  R  V  E  L  M  G  C  A  I  Z  Q  M  O  E  R  W  T
J  H  E  K  U  R  R  O  A  A  H  S  N  P  H  X  G  C  D  F  P  X  E  S  S
M  K  E  S  U  O  M  R  E  K  Q  I  S  S  I  A  T  E  E  W  S  X  D  Z  B
E  L  E  Y  R  A  M  M  U  S  S  K  Y  A  V  N  Y  E  S  U  N  F  T  S  L
V  L  R  J  L  D  W  A  Y  U  K  V  P  C  N  I  E  D  U  C  A  T  I  O  N
R  N  T  N  E  M  L  L  O  R  N  E  N  M  J  L  F  I  V  E  R  F  Z  Q  K
A  E  R  O  C  S  F  H  U  W  O  L  F  R  E  V  I  R  D  V  T  Y  G  L  M
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ACTION	APPS	ASSESSMENT	BARRIERS
CLICK	CONTACTS	DETAILS	DRIVER
DRIVER FLOW	EDUCATION	ENROLLMENT	FEP
HOUSING	INFORMAL	ISSUES	LANGUAGES
LEGAL	LINKS	MILITARY SERVICE	MOUSE
NCP	NOTES	PAGES	PARTICIPANT
PIN	REFERRED	SAVE	SCORE
SUBMIT	SUMMARY	TEST	TRANSPORTATION
WORK HISTORY	WORK PROGRAMS	WWP	