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## Chapter DWD 17

### W-2 WORKER TRAINING

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Note: Chapter HSS 217 as it existed on October 31, 1999 was repealed and a new chapter DWD 17 was created effective November 1, 1999.

**DWD 17.01 Introduction.** (1) **AUTHORITY AND PURPOSE.** This chapter is promulgated under authority set forth in ss. 49.143 (2) (c) and 103.005 (17), Stats., to ensure that each financial and employment planner, resource specialist, and supervisor employed by a W-2 agency directly or by subcontract has successfully completed a training program to achieve acceptable W-2 worker job performance. Successful completion of prescribed training is required for all new W-2 workers. The department shall make ongoing training available for experienced W-2 workers.

(2) **APPLICABILITY.** This chapter applies to W-2 agencies and the financial and employment planners, resource specialists, and supervisors who are employed by those agencies directly or by subcontract.

**History:** Cr. Register, October, 1999, No. 526, eff. 11-1-99; CR 02-050: am. Register January 2003 No. 565, eff. 2-1-03; CR 06-044: am. Register November 2006 No. 611, eff. 12-1-06.

**DWD 17.02 Definitions.** In this chapter:

(1) "Automated system" means a computer-supported process used by the department, including CARES.

(2) "CARES" means the department's automated client assistance for re-employment and economic support.

Note: CARES is the automated system used by DWD to determine eligibility, calculate benefits, and retain data for W-2.

(3) "Case management" means the family-centered and goal-oriented process for assessing the needs of a W-2 group member and his or her family for employment, training, and supportive services and assisting the W-2 group member in obtaining services to achieve self-sufficiency.

(4) "Department" means the Wisconsin department of workforce development.

(5) "Experienced financial and employment planner" or "experienced FEP" means a FEP employed by a W-2 agency directly or by subcontract who has completed initial FEP training.

(6) "Experienced resource specialist" means a resource specialist employed by a W-2 agency who has completed initial resource specialist training.

(7) "Financial and employment planner" or "FEP" means a case manager employed by a Wisconsin works agency directly or by subcontract who determines eligibility, assists in the process of determining eligibility, or performs case management functions. "FEP" includes a case manager who specializes in employment attachment and retention, assists W-2 participants with special needs, or assists W-2 participants with the Supplemental Security Income (SSI) and Social Security Disability Income (SSDI) application process.

(7m) "New financial and employment planner" or "new FEP" means an individual who is employed as a financial and employment planner by a W-2 agency, directly or by subcontract, and who has not completed the initial FEP training. "New FEP" includes a permanent employee of the W-2 agency who transfers into a FEP position and who has not completed initial FEP training within the previous year.

(8) "New resource specialist" means a person who is employed by a W-2 agency directly or by subcontract as a resource specialist who has not completed the initial resource specialist training, including a permanent employee who transfers into a resource specialist position and who has not completed initial resource specialist training within the previous year.

(8m) "Participant" means an individual who participates in any component of the Wisconsin works program.

(9) "Resource specialist" means a worker employed by a Wisconsin works agency who performs application entry, provides an initial assessment of a potential W-2 applicant's needs, makes referrals to service providers, or evaluates an individual's need for W-2. "Resource specialist" may also include a worker employed by an agency contracted with the department to provide access services.

(9m) "Supervisor" means a worker employed by a Wisconsin Works agency directly or by subcontract who supervises W-2 financial and employment planners or resource specialists.

(10) "Wisconsin works" or "W-2" has the meaning given in s. DWD 12.03 (37).

Note: "Wisconsin works" or "W-2" is defined in s. DWD 12.03 (37), Wis. Adm. Code, as "the assistance program for families with dependent children, administered under ss. 49.141 to 49.161, Stats."

(11) "Wisconsin works agency" or "W-2 agency" has the meaning given in s. DWD 12.03 (38).

Note: "Wisconsin works agency" is defined in s. DWD 12.03 (38), Wis. Adm. Code, as "a person, county agency, tribal governing body, or a private agency contracted under s. 49.143, Stats., by the department to administer the Wisconsin works program under ss. 49.141 to 49.161, Stats., and DWD 12. If no contract is awarded under s. 49.143, Stats., 'Wisconsin works agency' means the department."

(12) "W-2 handbooks, manuals, and instructional materials" means department-issued handbooks, manuals, and memos that are addressed to W-2 agencies and set forth eligibility and benefit criteria and case maintenance and case processing information for Wisconsin works.

(13) "W-2 worker" means a resource specialist and a financial and employment planner.

**History:** Cr. Register, October, 1999, No. 526, eff. 11-1-99; CR 02-050: r. (4) and (6) to (15), renum. (5), (16) and (17) to be (4), (10) and (11), cr. (5) to (9), (12) and (13) Register January 2003 No. 565, eff. 2-1-03; CR 06-044: am. (5), (6), (7) and (8), cr. (7m), (8m) and (9m), Register November 2006 No. 611, eff. 12-1-06.

**DWD 17.03 Initial W-2 worker training.** (1) **FEPs AND RESOURCE SPECIALISTS.** (a) The department shall make initial W-2 worker training available to new FEPs and resource specialists directly or through contractors. The W-2 agency shall ensure that each FEP and resource specialist completes the department's initial training during the first 6 months of employment.

(b) No FEP may make independent decisions related to eligibility or perform case management functions until the initial W-2 training for new FEPs is successfully completed.

(c) No resource specialist may make independent decisions related to providing an initial assessment of a potential W-2 applicant's needs, making referrals to service providers, or evaluating an individual's need for W-2 until the initial W-2 training for new resource specialists is successfully completed.

(d) To successfully complete the initial W-2 training, a new FEP or resource specialist shall attend all class hours and shall par-

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ticipate in all instructional activities. The W-2 agency shall develop evaluation strategies to ensure that the new FEP or resource specialist achieves a minimum standard of competence.

**(1m) SUPERVISOR.** A supervisor who is employed on or after December 1, 2006, to supervise FEPS or resource specialists shall complete the department's new worker training for the job function of the workers that the supervisor is supervising during the first 6 months of employment, unless the supervisor worked in that job function within one year prior to the date of hire as a supervisor. If a supervisor supervises both FEPs and resource specialists, the supervisor shall be required to complete the FEP training only.

**(2) STANDARD CURRICULUM.** (a) The department shall develop a standardized curriculum for training new FEPs and resource specialists. The standardized curriculum shall include courses, independent study, and closely supervised practical experience and shall ensure that learning objectives support an acceptable standard of competency at completion. The curriculum may vary depending on job function and may include the following:

1. Program philosophy emphasizing W-2 as a work program.
2. Policy and procedure in W-2 handbooks, manuals, and instructional materials.
3. Eligibility determination.
4. Automated systems used in the W-2 program.
5. Interpersonal skills needed to perform W-2 functions.
- 5g. Civil rights compliance, cultural awareness, and diversity issues.
- 5r. Compliance with the Americans with Disabilities Act (ADA).
6. Case management information and skills, including:
  - a. Employment and training information for W-2 participants, including job readiness assessment, skills training opportunities, job search activities, labor market information, career planning, and job retention skills.
  - b. Special needs of the W-2 participant or a family member as those issues affect the W-2 participant's employability, including substance abuse, domestic abuse, and physical or mental disabilities.
  - c. Community resources and supportive services available to assist W-2 participants.
  - d. Collaboration and coordination with local child welfare agencies.

**(3) DOMESTIC ABUSE TRAINING.** (a) A FEP shall complete 12 hours of training in domestic abuse awareness within the first year of employment, including case management strategies and the department's comprehensive screening tool.

(b) A resource specialist shall complete 6 hours of training in domestic abuse awareness within the first year of employment.

(c) A supervisor who is required to take the initial W-2 training under sub. (1m) shall complete domestic abuse awareness training for the job function of the workers who the supervisor is supervising.

**(4) COMPARABLE TRAINING.** A W-2 agency may develop its own training to implement the standardized curriculum under sub. (2), with approval by the department. A W-2 agency that chooses not to participate in the initial training for new W-2 workers offered by the department or its contractors shall submit a training implementation plan to the department for approval at least 45 days before the planned start date of the training. Training plans shall be submitted to the department on an annual basis. The plan shall do all of the following:

- (a) Specify the number of hours of classroom training, independent study, planned exercises, and activities.
- (b) State how W-2 handbooks, manuals, and instructional materials will be used.

(c) Explain how training will address the interpersonal and case management skills needed to perform the W-2 function.

(d) Specify the number of hours of supervised practical experience, including the use of automated systems, W-2 program policy and procedure application, and case management techniques.

(e) Indicate the length of the training program.

(f) Describe how learning will be evaluated.

(g) Include the name, address, position title, and qualifications of each trainer.

**Note:** Send the proposed W-2 training implementation plan to: BW-2 Partner Training Section, DWD Division of Workforce Solutions, P.O. Box 7972, Madison, WI 53707-7972. A copy of the department's training schedule for new and experienced workers may be obtained by writing the above address or by accessing the Bureau of Wisconsin Works Partner Training website at <http://www.dwd.state.wi.us/dwspst>.

**History:** Cr. Register, October, 1999, No. 526, eff. 11-1-99; CR 02-050: r. and recr. Register January 2003 No. 565, eff. 2-1-03; CR 06-044: r. and recr. (1) and (3), cr. (1m), (2) (a) 5g., 5r. and 6. d., am. (2), (a) (intro.), 1. and 4., 6. a. and b., (4) (intro.), r. (2) (b) and (c), Register November 2006 No. 611, eff. 12-1-06.

**DWD 17.04 Ongoing training for experienced W-2 workers.**

**(1) STANDARD CURRICULUM.** The department shall develop an ongoing course or courses for supervisors, experienced resource specialists, and experienced FEPs and shall make the course or courses available each year directly or through contractors. The department shall annually define required training courses and develop a standardized curriculum for each job function as needed. The curriculum shall include the following:

- (a) Refresher material on W-2 policy and procedure.
- (b) Automated systems used in the W-2 program.
- (c) Interpersonal skills needed to perform W-2 functions.
- (cg) Civil rights compliance, cultural awareness, and diversity issues.
- (cr) Compliance with the Americans with Disabilities Act (ADA).
- (d) Enhanced case management information and skills, including:
  1. Employment and training information for W-2 participants, including job readiness assessment, skills training opportunities, job search activities, career planning, labor market information, and job retention skills.
  2. Special needs of the W-2 participant or a family member as those issues affect the W-2 participant's employability, including substance abuse, domestic abuse, and physical or mental disabilities.
  3. Community resources and supportive services available to assist W-2 participants.
  4. Collaboration and coordination with local child welfare agencies.

**(2) COMPARABLE TRAINING.** A W-2 agency may develop its own training to implement the standardized curriculum under sub. (1), with approval by the department. A W-2 agency that chooses not to participate in training offered by the department or its contractors shall submit a training implementation plan to the department for approval at least 45 days before the planned start date of training. Training plans shall be submitted to the department on an annual basis. The plan shall:

- (a) Specify the number of hours of classroom training, independent study, planned exercises, and activities.
- (b) Indicate the length of the training program.
- (c) Describe how learning will be evaluated.
- (d) Include the name, address, position title, and qualifications of each trainer.

**Note:** Send the proposed W-2 training implementation plan to: BW-2 Partner Training Section, DWD Division of Workforce Solutions, P.O. Box 7972, Madison, WI 53707-7972.

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A copy of the department's training schedule for new and experienced workers may be obtained by writing the above address or by accessing the Bureau of Wisconsin Works Partner Training website at <http://www.dwd.state.wi.us/dwspts>.

**History:** Cr. Register, October, 1999, No. 526, eff. 11-1-99; CR 02-050: am. (1) (intro.) to (c), renum. (2) to be (3) and am. (3) (intro.), cr. (2) Register January 2003 No. 565, eff. 2-1-03; CR 06-044: am. (1) (intro.) and (a), (d) 1. and 2., cr. (1) (eg) and (cr), (d) 4., r. (2), renum. (3) to be (2), Register November 2006 No. 611, eff. 12-1-06.

**DWD 17.05 Trainer qualifications.** The department shall ensure that the person doing the training has:

(1) Knowledge of the programs and procedures in which the person will conduct training as evidenced by prior experience or education.

(2) Experience or education in training techniques or adult education.

**History:** Cr. Register, October, 1999, No. 526, eff. 11-1-99.

**DWD 17.06 Local responsibility for implementing updates.** Each W-2 agency shall ensure that all W-2 workers are trained in a timely manner on all W-2 policy and procedure and automated system updates that are issued by the department.

**Note:** These updates include Handbook and Manual releases, DWS Administrator's Memos, and Operations Memos.

**History:** Cr. Register, October, 1999, No. 526, eff. 11-1-99; CR 02-050: am. Register January 2003 No. 565, eff. 2-1-03; CR 06-044: am., Register November 2006 No. 611, eff. 12-1-06.

**DWD 17.07 Reports and records. (1) ANNUAL REPORT.** Each W-2 agency shall submit to the department by the second

Friday in January of each calendar year a report that documents training completed by all supervisors, new and experienced FEPs, and new and experienced resource specialists during the previous calendar year. The report shall include information on training received by individuals employed directly by the W-2 agency and individuals employed by the W-2 agency's subcontractors.

(2) **REPORT OF INITIAL W-2 WORKER TRAINING.** Each W-2 agency shall submit to the department by the first day of each month a list of supervisors, FEPs, and resource specialists who are required to complete initial W-2 worker training, including individuals employed directly by the W-2 agency and individuals employed by the W-2 agency's subcontractors.

(3) **PERSONNEL FILE.** Each W-2 agency shall include in the personnel file of all new and experienced W-2 workers information needed to document successful completion of training, including the title of the training program, dates of training, trainer's or sponsoring organization's name, number of hours of training, and location of training. The W-2 agency shall make the training records available to the department upon request.

**Note:** Send the monthly list of W-2 workers who are required to complete initial W-2 worker training and the annual report on training to the appropriate Regional Contract Administrator.

**History:** Cr. Register, October, 1999, No. 526, eff. 11-1-99; CR 02-050: am. Register January 2003 No. 565, eff. 2-1-03; CR 06-044: am. (1) and (2), Register November 2006 No. 611, eff. 12-1-06.