

Technical Assistance Guide

In Support of the Memorandum of Understanding



Wisconsin Division of Vocational
Rehabilitation
&
Wisconsin Works Program

(Revised: 08/2009)

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Introduction

The purpose of this Technical Assistance Guide (TAG) is to support and put into practice the *2008 Memorandum of Understanding* (MOU) between the Division of Vocational Rehabilitation (DVR) and the Wisconsin Works Program (W-2) (http://dwd.wisconsin.gov/dvr/pdf_files/w2_mou.pdf).

The goals of this MOU are to:

- Increase successful employment outcomes for individuals with disabilities being served.
- Maximize available resources and reduce duplication of effort.
- Increase DVR Counselors' and W-2 Case Managers' program knowledge related to disability and low-income employment resources.
- Increase services to individuals with disabilities who are minorities or unserved or underserved.

This TAG was developed and piloted by a workgroup comprised of members from:

Wisconsin Department of Workforce Development

Division of Vocational Rehabilitation (DVR)-Assists individuals with disabilities to gain, retain, or advance in employment.

Wisconsin Department of Children and Families

Division of Family and Economic Security, Wisconsin Works Program (W-2) - Provides services to prepare individuals to work, and to obtain and maintain viable, self-sustaining employment.

W-2 workgroup members included representatives from:

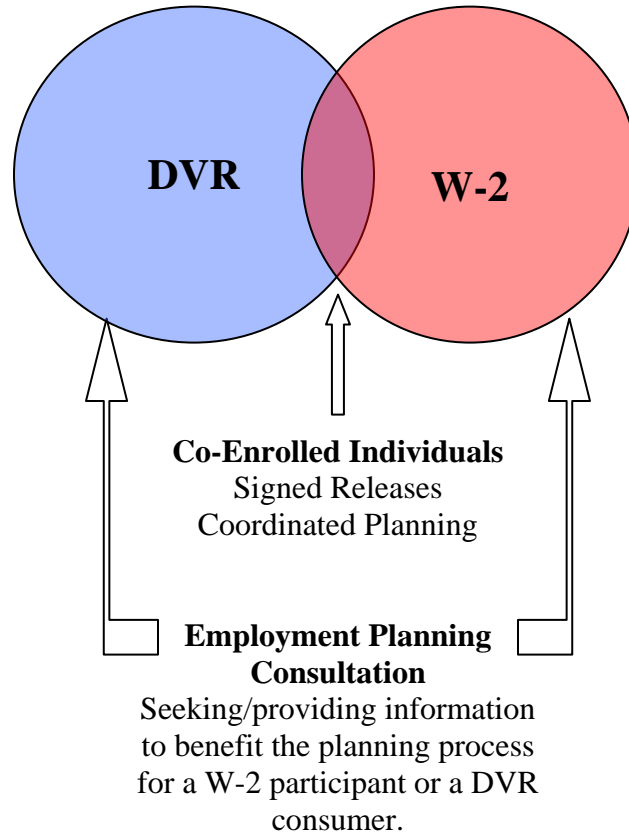
- DCF Central Office
- YWCA of Greater Milwaukee
- MAXIMUS Inc.
- Policy Studies Inc. (PSI)

The Wisconsin Rehabilitation Council

A citizen advisory council, appointed by the Governor, that advises and assists DVR in improving services for Wisconsin citizens with disabilities.

This guide was specifically designed to work with individuals with disabilities who are either consumers* in the DVR program or participants* in the W-2 program, but not co-enrolled in both programs or who are currently being served by both the DVR and W-2 programs.

*Due to differences in terminology across programs, the term *participant/consumer* will be used throughout the document when referring to individuals who are co-enrolled in both DVR and W-2.



This guide can be used as a framework for improved communication, coordination, and provision of services for individuals with disabilities who are working to obtain employment. It covers areas such as:

- Employment and Planning Consultation
- Referral & Eligibility Information
- Coordination and Employment Planning for Co-Enrolled participants/consumers
- Services Provided by DVR and the W-2 Program
- Funding and Cost Sharing
- Commonly asked Questions and Answers
- Program and other related information

We hope that everyone involved in this process finds this tool to be useful in working with our mutual participants/consumers!

Enhancing Communication with Participants

The following information is provided to assist both DVR staff and W-2 staff when working with participants/consumers. The information found in this section is for the purpose of enhancing communication and understanding by the participant/consumer throughout the process of them achieving their employment goals.

Modes of communication/accommodations:

- Both DVR and W-2 are responsible for ensuring that information is being shared in an appropriate format for the participants/consumers individualized needs.
- The best way to learn if a participant/consumer has any individualized needs is to ask them.
- The participant/consumer should be given assistance and accommodations as needed to assist them in understanding what is being shared with them.

Examples (the following examples are not meant to be all inclusive and are only intended as examples):

- A participant/consumer with a visual impairment may need documents provided in large print.
- Some participants/consumers may prefer written information while others may prefer it both written and verbally shared with them to meet their learning needs.

Benefits of coordination

When an individual is co-enrolled, federal and state laws require that the W-2 and DVR programs each develop a plan for employment; W-2 uses an Employability Plan (EP) and DVR uses an Individual Plan for Employment (IPE)). However, the two agencies have the ability to coordinate the two plans and the needed supportive services to the benefit of the participant/consumer and both agencies. The goals on these two plans may not always be the same or have the same timeframes.

When a participant/consumer will be potentially served by both DVR and W-2, or if they are currently co-enrolled in both programs, it is important for staff to explain the importance and benefits of allowing for coordination of services. Coordination between DVR and W-2 may:

- Give the individual access to a greater range of supports and services to help meet his/her needs.
- Help to expedite the achievement of his/her short and long term employment goals.
- Enable the individual to access the expertise, skills and knowledge of both DVR and W-2 staff.
- Ensure that the individual's Individualized Plan for Employment (IPE) and Employability Plan (EP) align as much as possible and are working towards the same outcomes.
- Enable some types of services and supports provided under the IPE to count towards W-2 participation under the EP.
- Eliminate repetition of similar activities and reduce overall workload on the participant/consumer.

Participant/Consumer Informed Choice

- It is important for participants/consumers to be involved in all decisions made throughout the process (e.g., employment goal, services, service providers, progress measures, etc.).
- Decisions should not be made for the participant/consumer.
- Participants/Consumers should also be aware of the consequences and impact of their decisions.

Examples:

- Participant/Consumer is co-enrolled in both programs but will not allow DVR and W-2 to communicate. The participant/consumer is requesting transportation services from DVR. DVR is required to seek comparable benefits. DVR is unable to verify if a consumer is receiving the same service from W-2. This can cause a delay or denial of a service.
- A participant/consumer may feel they are not benefiting from one or the program and choose to continue to work with only one, ending services with the other.
- Allowing the time for discussion and questions to be asked regarding choices made in the process should be allowed.
- A participant/consumer can make a choice or decision; either or both programs may not agree with the choice or be able to assist with it.

Employment Planning Consultation Not currently co-enrolled

Employment planning consultation is the provision of technical assistance between the W-2 program and DVR. For individuals with disabilities who are either consumers of the DVR program or participants in the W-2 program, but who are not currently co-enrolled in both programs, the agency representatives from W-2 and DVR may consult for the purposes of improving employment outcomes. *Employment planning consultation may also be provided for a W-2 participant who has been found eligible for DVR services but is currently on the waitlist.* The agency acting as the consultant would not bear any financial or ongoing counseling/case management responsibilities.

DVR may act as consultant to the W-2 agency in order to:

- Provide information and trainings on the DVR program, eligibility requirements, application procedures, scope of services, policies, and process to W-2 staff and participants.
- Assist the W-2 agency with identifying disability-related resources available within a participant's community such as qualified assessing agencies, treatment providers, disability advocates and other organizations whose mission includes serving individuals with disabilities;
- Provide technical assistance to the W-2 case manager in applying recommendations from a disability or vocational assessment in the development of the W-2 employability plan. This may include:
 - recommending work and training activities that are appropriate for the W-2 employability plan to help move the individual towards employment in the local labor market.
 - identifying specific disability accommodations and assistive technology to make work and training accessible to a participant.
- Determine if referral of a participant for DVR services is appropriate. (See [Referral and Eligibility](#) section, Page 9.) In cases where the participant is unsure of how enrollment in DVR would be beneficial, or the impact of receiving DVR services on other benefits they are receiving, **it may be appropriate to schedule a meeting with the participant, the W-2 case manager and a DVR representative to discuss how the two programs could coordinate to help the individual achieve his/her employment goal(s);**

Note: DVR is a voluntary program. If an individual is not interested in DVR services, DVR can provide consultation to an individual to explain the program and possible benefits of DVR services to help them make an informed choice on whether the DVR program is an appropriate match for them or not.

- Provide general information regarding disability-related topics; and

- **Provide referral and technical assistance for W-2 participants who are on the DVR waitlist.** Any technical assistance that can be provided while the consumer is on the waitlist can be of benefit to the participant in achieving their employability plan goal and also their future IPE goal.

W-2 may act as consultant to the DVR agency in order to:

- Provide information and trainings on the W-2 program, eligibility requirements, application procedures, scope of services, policies, and process to DVR staff and participants.
- Provide technical assistance and assist the DVR agency with identifying other resources available within the participants/consumer's community, such as financial assistance, supportive services for children and families, domestic violence, and AODA.
- Determine if referral of a consumer to the W-2 program is appropriate. (See [Referral and Eligibility](#) section, Page 9.)

Successful Agency Practices

W-2 and DVR agencies who serve individuals in the same geographic region should come to agreement on one or more methods for establishing and maintaining lines of communication. **All regions are encouraged to have monthly or quarterly gatherings of W-2 and DVR case managers to network, share information and provide updates about their respective programs.** This should also include providing up-to-date contact lists to the other agency.

The following are additional recommendations that could be put into practice to coordinate services for co-enrolled participants/consumers:

- Designate liaisons at the W-2 and DVR agencies that develop cross-program relationships and act as consultants when called upon by the other agency.
- Designate a first-point-of-contact at the W-2 and DVR agencies who would direct the question or request to the appropriate individual. This first-point-of-contact should have a working knowledge of this TAG and the responsibilities that both the W-2 and DVR agencies have as part of the MOU.
- **DVR and W-2 staff schedule office hours in each others office to be available as a resource and to meet with co-enrolled participants/ consumers.** By having a presence in each others office you are also available to consult on cases that are not currently co-enrolled, answer questions related to the DVR and W-2 program, and become familiar with staff from the other program.
- Hold joint staffings with co-enrolled participants/ consumers as a means of coordination. (See [Coordination of Employment Planning for Co-Enrolled DVR & W-2 Individuals](#) section, Page 11.)
- Schedule "in-service" trainings for each others programs.

Referral & Eligibility Information Not currently co-enrolled

The decision of whether a referral should be made to either the DVR program or the W-2 program should be determined together with the participant and other stakeholders, as appropriate. This may include staff from the program in question.

The following are general guidelines intended to assist in the decision making process. Staff from both the **DVR and W-2 programs are encouraged to contact each other to consult when it is unclear if a referral would be appropriate.**

A participant may choose to make a self-referral to either agency at anytime.

A referral to DVR should be made if all the following are met:

- The individual has a disability
- There are perceived barriers to employment
- The participant is interested in gaining competitive employment
- The participant has been informed of what DVR services are and is interested in applying for services

If a W-2 participant is applying to receive SSI/SSDI benefits and is unsure if they are interested in DVR services or the impact DVR services could have on their benefits, DVR can be contacted to discuss and assist the participant in making an informed choice.

DVR Eligibility Process:

An application for services can be requested by calling or stopping into a local DVR office. For DVR program and eligibility information, please refer to [Appendix 2](#).

When a completed application is received information and documentation of an individual's disability will be sought to assist in the eligibility determination. An eligibility determination must be made within 60 days unless an extension is requested and approved. For information on the eligibility criteria for the DVR program as well as DVR waiting list refer to [Appendix 2](#). Addresses and contact information for each DVR office can be found at <http://dwd.wisconsin.gov/dvr/locations/default.htm>.

A referral to W-2 should be made if:

- The individual is a custodial parent of a dependent child
- The family's income is below 115% of the FPL

There are other financial and non-financial eligibility criteria that are part of the eligibility process.

W-2 Eligibility Process:

An application for W-2 can be requested by calling or stopping into a local W-2 agency. In Milwaukee, W-2 agencies are broken out by regions. In the balance of the state there is a W-2 agency located in every county. Addresses and contact information for each agency can be found at <http://dcf.wisconsin.gov/w2/resources/w2agencies.asp>.

A determination of eligibility is made within 12 working days after the date of application unless the individual needs additional time to obtain required eligibility verification information.

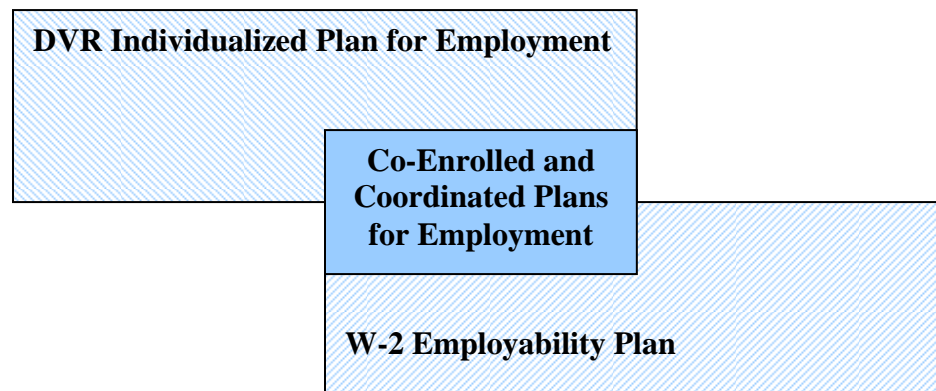
Successful Practices

- If there are questions regarding whether a specific individual should be referred, the participant, W-2 Case Worker or DVR staff can contact the program to consult on the circumstances of the specific case.
- DVR and W-2 can be contacted to obtain information related to their program to share with the participant. This information may be in the form of verbal information, brochures, a joint meeting if determined needed, etc.
- If DVR and W-2 staff schedule office hours in each others office they can be available to provide employment planning consultation and meet with staff and/or consumers to answer any questions related to eligibility and referral.
- Both DVR and W-2 should ensure that information being shared with the participant/consumer is provided in an appropriate format, that the participant/consumer is given assistance and accommodations as needed, and that the participant/consumer understands what is being shared with him/her.
- A contact list of the various DVR and W-2 staff should be kept up to date to allow programs and agencies to easily contact one another.
- **When a referral is being made have the participant/consumer sign a release of information to allow DVR and W-2 to follow-up with each other and share information related to and necessary for referral, eligibility and coordination. *This information could be shared in various formats- email, fax, phone call, etc.* (See [Appendix 2](#) & [Appendix 3](#).)**

Coordination of Employment Planning For Co-Enrolled DVR & W-2 Individuals

When an individual is co-enrolled in the W-2 and DVR programs, coordination between both programs and the individual is beneficial to all parties. Through coordination, both DVR and W-2 will:

- Increase successful employment outcomes for individuals with disabilities being served;
- Maximize available resources and reduce duplication of effort; and
- Increase DVR Counselors' and W-2 Case Managers' program & resource knowledge.



There are five areas where coordination can assist the individual, DVR, and W-2:

1. Initial Communication
2. Coordination Meeting and Identification of Employment Goal(s)
3. Identification of the Participant's/Consumer's Needs to Achieve the Goal(s)
4. Coordination of Support and Services
5. Follow-up

1. Initial Communication

Both the W-2 and DVR agencies share in the responsibility for initiating contact when an individual is co-enrolled. As methods of communication between agencies are established at the local level, the process of initiating coordination will become easier. Critical steps include:

- Obtaining necessary Releases of Information. (See [Appendix 2](#) & [Appendix 3](#).)
- Identifying the key persons that should be part of the coordination process. This should include:
 - Primary case manager(s) from DVR and W-2 programs
 - The co-enrolled individual and any authorized representatives
 - Case managers from any other program(s) who play a critical role in this individual's plan for employment.

- Coming to agreement about which case manager (W-2 or DVR) will facilitate coordination meetings.
- Scheduling the first coordination meeting in a location conducive to the planning process.
- If a participant/consumer is currently on the DVR waiting list, DVR is not able to provide services to the consumer until they are activated from the waiting list. However, DVR can provide consultation services at this time. (See [Employment Planning Consultation](#) section, Page 7.)

2. Coordination Meetings and Identification of Employment Goal(s)

- The purpose of coordination meetings is to help the individual achieve his or her employment goal(s). The coordination meeting should be attended by the co-enrolled individual, representatives from both programs, and others as determined appropriate.
 - A discussion of the participant's/consumer's involvement with each program, expectations, and identification of roles should occur.
 - The co-enrolled participant's/consumer's employment goal(s) should be developed based on the individual's skills, abilities, interests and local labor market information.
- Individuals who become co-enrolled will, in many cases, have already been through a process of assessment and employment planning with one or both agencies before coordination occurs across the two programs. Once the coordination process has begun, it is critical that the employment goals identified on the DVR IPE and the W-2 EP are aligned and or coordinated, although they will not always have the same goal or timeframes.
- Federal and state laws require that the programs each develop a plan for employment (W-2 uses an Employability Plan (EP) and DVR uses an Individual Plan for Employment (IPE)). However, the two agencies have the ability to coordinate the two plans and the needed supportive services to the benefit of the individual and both agencies.
- Federal law requires that the DVR program affords the person the opportunity to make informed choices. This means the individual must have the opportunity to understand their choices and the pros and cons of those choices. Informed choice does not require DVR to provide financial support for a specific choice. Informed choice means choosing among options, whether they be DVR supported or not supported.
- The W-2 and DVR agencies will not always share equal responsibility for all recorded goals (for example, W-2 could take primary responsibility for achieving the short-term employment goal and DVR could take primary responsibility for achieving the long-term employment goal).
- The individual must be able to walk away from the coordination meeting with a clear understanding of how the two programs are going to assist in meeting his/her employment goal(s).

3. Identification of the Participant's/Consumer's Needs to Achieve the Goal(s):

- Together the participant/consumer, DVR, W-2 and other participants, as determined appropriate, should discuss the participant's/consumer's identified goal(s) and what he/she will need to achieve the goal(s).
 - What barriers does the participant/consumer have that need to be addressed, both disability and non-disability related.
 - What resources and strategies are needed to assist the participant/consumer to reach the job goal?
 - What skills does the participant/consumer need to qualify for the job?
 - What does the participant/consumer need in order to complete the essential functions of the job?
 - Examples include:
 - Work experiences (short-term work training for the purpose of assessment, skill development, etc.)
 - Job skills training
 - Adult Basic Education
 - English as a Second Language (ESL) classes
 - Job search/job readiness assistance
 - Work place accommodations
 - Treatment and counseling
 - Rehabilitation Technology (e.g., telecommunications, sensory and other technological aids and devices.)
- The participant/consumer should be as involved as much as possible in identifying what he/she needs to get a job that matches their goal and keep that job.
- Identification of who is responsible for providing the services and supports are not identified at this point.

4. Coordination of Supports and Services:

- After the participant's/consumer's goal and his/her needs (services, supports, activities, etc.) related to achieving the goals are identified, discussions should occur looking at all options to locate the supports and services needed to achieve the individual's employment goal(s).
- Both W-2 and DVR must contribute resources within the framework of their programs policies and procedures. The agencies will need to work out cost-sharing agreements on a case-by-case basis. (See [Funding and Cost Sharing](#).)

5. Agree on Follow-up Steps

- Agree, in writing, who has responsibility for each part of the plan and incorporate into the EP and IPE.
- Schedule periodic meetings with DVR, W-2, and other participants as determined needed to assess progress and adjust the plan as needed.

- Ensure there is a clear understanding between agencies and individual of what next steps will be when an employment goal is achieved (i.e., follow-up services, case closure, etc.).
- Keep lines of communication open among key players.

Coordination Scenarios:

Scenario One

Ellen has a back injury that requires a sedentary job. She completed the 9th grade but dropped out during her sophomore year of high school. Previous work experience has included dish washing in the kitchen at a local restaurant and farm work on her family's dairy farm. Ellen recently became eligible for W-2 and has already participated in a job readiness/motivation workshop through the W-2 agency. The workshop provided training on soft skills and resume development.

Ellen's goals identified on her W-2 Employability Plan are to:

- complete her GED; and
- obtain a full-time job as an office assistant.

After consulting with a local DVR counselor, Ellen was referred to DVR by her W-2 Case Manager. Ellen was found eligible for DVR services. A meeting was held to discuss Ellen's background, current activities assigned under W-2, her disability and barriers to employment.

Through the coordination process, Ellen and the two agencies agree to work toward Ellen's education and employment goals.

Identification of Supports and Services

Through the coordination planning process, Ellen, her W-2 case manager, and DVR counselor determine that for Ellen to achieve her goals she will need the following supports and services from W-2 and DVR:

- Adult basic education courses in order to raise her to a level of math and reading proficiency that will enable her to complete the GED requirements
- Basic computer skills training
- Work experience at a local business or charitable organization that will help Ellen practice general work place habits and soft skills in an office setting.
- Assistance with transportation costs to participate in the various activities.
- Rehabilitation Technology Assessment/devices (e.g., specialized work chair)
- Job Search assistance

Coordination of Supports and Services

The W-2 and DVR case managers come to agreement on the following cost-sharing strategy:

W-2 will:

- Cover costs of participation in adult basic education classes with a goal of raising her math and reading skills to the level needed to begin working on GED requirements in one year.
- Connect her with a work experience at a local business as an office assistant.
- Pay for transportation costs for work experience

DVR will:

- Enroll her in a 4-week training course on basic computer skills.
- Assist with disability-related needs
- Pay for transportation costs training and job search
- Assist with Job search

Scenario Two:

William is a high school graduate with a very brief work history. He lives with his elderly parents and he is also the single parent of a 5-year old son. After graduating from high school, William began working at an automotive shop repairing cars. Shortly thereafter, he started having panic attacks that were so severe that he stopped showing up for work and was eventually fired. William was later diagnosed with an anxiety disorder. It is difficult for him to be in public places especially if he is required to interact with strangers. Activities such as grocery shopping, classroom participation and community events are very difficult for him. William's parents have financially supported him and his son throughout his period of unemployment. But with the aid of medication and counseling, William feels he is now ready to start working again.

William first applies with DVR, knowing that his disability may qualify him for some employment services. At the initial appointment the DVR counselor explains to William that there is currently a wait list for DVR services and they discuss other resources that may be available in his community. The W-2 program is discussed and William decides to apply for W-2. William is found eligible for DVR services and is placed on the waiting list.

As part of the informal assessment process that is required for W-2 applicants, the W-2 case manager contacts the DVR counselor who met with William and requests that the counselor act as a consultant on Williams W-2 case to make recommendations for appropriate activities and workplace accommodations that may help William re-enter the workforce. William signs the necessary release of information forms to enable the W-2 case manager and the DVR counselor to speak directly about his case.

William's goals include:

- Short-term – obtain a full-time job in the automotive industry that will allow him to financially support him and his son and build his confidence;
- Long-term – Complete an associate degree in automotive technology that would enable William to fulfill his career dream of managing an automotive service repair business.

The W-2 agency will work with William towards his goal of full-time employment in the automotive industry. As a consultant, the DVR counselor is able to recommend strategies for the W-2 agency to use to help William with his employment search and accommodations that could help William adjust to a work situation.

When William is activated from the DVR waitlist, DVR will help William further explore with him, his goal of completing his associate degree and needed services.

Service Provision by the DVR & W-2 Programs

Services Under DVR:

The Wisconsin Division of Vocational Rehabilitation (DVR) can provide employment and training services to eligible consumers. The services provided will depend on the consumer's job goal and what he/she needs to reach that goal.

- ❖ Career guidance and counseling.
- ❖ Job search and placement assistance.
- ❖ Information and referral services.
- ❖ Transition-to-work services for high school students with disabilities.
- ❖ Supported employment services for persons with severe disabilities, includes time-limited, on-the-job supports.
- ❖ Rehabilitation technology.
- ❖ Vocational and other training.
- ❖ Disability and employment assessment.
- ❖ Transportation.
- ❖ Occupational licenses, tools and other equipment.
- ❖ Assistance in small-business plan development.
- ❖ Interpreter services.
- ❖ Rehabilitation teaching services.
- ❖ Diagnosis and treatment.
- ❖ Post-employment services.
- ❖ Any other services that are needed for you to reach your job goal.

Services Under W-2:

Each W-2 eligible participant meets with a Financial and Employment Planner (FEP), who helps the individual develop a self-sufficiency plan and determine his or her place on the W-2 employment ladder. The ladder consists of four levels of employment and training options. More information about these employment and training options can be accessed at <http://dcf.wisconsin.gov/w2/wisworks.htm>. (See also [Appendix 3](#).)

W-2 also provides education and training opportunities in conjunction with work or work-related activities in order to facilitate an attachment to the workforce as soon as possible. More information about education and training opportunities can be accessed at http://dcf.wisconsin.gov/w2/education_training.htm.

(Note: Information in this fact sheet pertaining to *Aggregated Education and Training* will be particularly useful in the W-2/DVR collaboration process.)

In addition to employment and training services, W-2 helps families connect with other community resources and provides work supports to help individuals retain employment and advance in their careers.

Funding & Cost Sharing

When there is an overlap of employment services, a cost sharing arrangement may be negotiated between DVR and the W-2 program. To determine who will pay for a service for a common participant/consumer, the DVR and the W-2 programs must be consulted.

The following are general guidelines to help understand how decisions can be made under the DVR and W-2 Memorandum of Understanding.

Test 1: Will the service help the participant/consumer achieve an IPE goal? If yes, DVR is primarily responsible for the service.

Test 2: Will the service help to achieve the EP goal? If yes, W-2 is primarily responsible for the service.

Test 3: If the same goal and service appears on both the IPE and the EP, DVR and W-2 are responsible for negotiating a cost sharing arrangement. Conflicts between W-2 and DVR are to be resolved utilizing the conflict resolution process outlined in [Appendix 5](#).

Examples of cost sharing:

- It is agreed between DVR and W-2 that a participant/consumer will need specialized job placement services to assist in gaining employment to meet the mutually agreed upon goal. DVR agrees to provide the job development services and W-2 agrees to cover the transportation costs associated with this service.
- A participant's/consumer's EP and IPE list an employment goal of part-time employment in childcare. W-2 agrees to provide the short-term childcare training and DVR agrees to fund a rehabilitation technology assessment to determine the participant's/consumer's accommodation needs when working in this field.
- It is agreed that a participant's/consumer's EP goal will be short term and is for working as a CNA. The participant's/consumer's IPE is agreed to as a long term goal of employment as an RN. The participant/consumer needs to complete CNA training as part of the goal of becoming an RN and will work as a CNA while going to school for RN. W-2 agrees to fund the CNA training and DVR funds the RN training.
- It is agreed by the participant/consumer, DVR and W-2 that W-2 will assist a participant/consumer in obtaining employment in a job that meets their current financial needs (does not necessarily tie into IPE goal) while DVR continues to assist the participant/consumer with training and future employment to meet their IPE goal.

Successful practices

- If there are any questions or concerns at the meeting regarding who should pay for services, both DVR and W-2 should schedule an additional meeting to finalize this. This will allow them time to consult with their supervisor and to not feel rushed to come to a conclusion in one meeting. If the issue can not be resolved they should work with their supervisor following the process outlined in the conflict resolution in [Appendix 5](#).
- Allow for creativity while still ensuring that all policy and purchasing procedures are followed for both programs.

Commonly Asked Questions

Who is responsible for obtaining a release of information?

Both the DVR program and the W-2 program are responsible for ensuring the confidentiality of the individual that is a participant in their program. Each program should obtain signed releases of information, allowing them to release necessary information, as appropriate, that meet their standards, and that are required by their policies. The participant should be informed of their rights related to confidentiality as well as the limits of it.

Should a W-2 participant be referred to DVR to have them determine if he/she has a disability?

Referral to DVR is for the purpose of determining eligibility for DVR services and should never be done for the sole reason of determining whether an individual has a disability.

How will an individual's W-2 benefits be impacted if they receive services from DVR?

When an individual is eligible for both W-2 and DVR, the goal of the two programs should be to work in coordination (see [Coordination of Employment Planning for Co-Enrolled DVR & W-2 Individuals](#) section, Page 11) to ensure that the individual's Individualized Plan for Employment (IPE) and Employability Plan (EP) align as much as possible and are working toward the same outcomes. This will further enable some types of services and supports provided through DVR to count towards W-2 participation.

If an individual who is co-enrolled in both W-2 and DVR refuses to allow coordination to occur between the two programs, this could make it more difficult for the individual to fulfill program requirements which could further lead to sanctions to the W-2 benefit.

What if a participant/consumer will not allow communication between DVR and W-2?

If a participant/consumer will not allow communication between DVR and W-2 it is recommended that the W-2 case manager and DVR counselor explain the benefits of coordination, as well as informed choice and the possible benefits and consequences of the choices being made. (See [Enhancing Communication with Participants](#) section, Pages 5-6.)

What are comparable benefits under the DVR program?

Prior to providing any DVR services to a consumer DVR staff must determine if comparable benefits or services exist under any program and whether those benefits or services are available to the consumer. If available, the comparable benefits and services shall be used in whole or in part to cover the cost of VR services. There are some services that are exempted from comparable benefits as well as provisions of when they would not be required. DVR can be contacted for further information.

Is there a waitlist for DVR services?

Yes. There are times when DVR does not have enough resources to serve everyone who is eligible for services. To manage this, the names of newly eligible consumers are placed on the waiting list. There will be times when there is no actual waiting list period for services. To determine the current length of the waitlist at the time you apply, contact your local DVR office.

If a co-enrolled participant/consumer is on the DVR waitlist what can W-2 do in the meantime to assist the participant/consumer?

W-2 staff should continue to work with the participant/consumer on their Employability Plan. DVR can be consulted as needed while the participant/consumer is on the waiting list. (See [Employment Planning Consultation](#) section, Page 7.)

What is the eligibility criterion for DVR services?

See [Appendix 2](#).

How can I find out the person I should contact at DVR?

Each region is encouraged to develop and maintain a contact list to share with the W-2 staff in their region.

How can I find out the person I should contact at W-2?

Each region is encouraged to develop and maintain a contact list to share with the DVR staff in their region.

What if a participant/consumer is not released to work by their medical provider?

If a participant/consumer is not released to work by their medical providers DVR may be able to still assist them towards employment. In Wisconsin, DVR has decided to assume that all individuals with disabilities can benefit from services. By working closely with the medical provider, and participant/consumer, trial work experiences and other services can be provided to assist the participant/consumer in attempting to work. In some cases a consumer is able to work with accommodations and with the right employment setting. If a consumer is interested in gaining employment but unsure if they will be able to due to their disability and limitations DVR can be contacted to discuss the specifics of the case and possible benefits from services

Should the EP and IPE goals match?

This depends. There are times when the EP and IPE are working towards the same goal. In other cases the EP goal will be a short term goal to assist the participant/consumer with immediate employment and the IPE goal will be the long term goal that the participant/consumer is working toward. This will depend on the needs of the participant/consumer and what is determined through the coordination process.

Who is responsible for paying for services?

See [Funding and Cost Sharing](#) section, Page 19.

What services can DVR provide?

See [Service Provision](#) section, Page 17

Sample Plans

DVR's Individualized Plan for Employment

Can also be found at: http://dwd.wisconsin.gov/dwd/forms/dvr/doc/dvr_12726.doc

Department of Workforce Development

Division of Vocational Rehabilitation

INDIVIDUALIZED PLAN for EMPLOYMENT (IPE)

Personal information you provide may be used for secondary purposes [Privacy Law, s. 15.04 (1)(m) Wisconsin Statutes].

CHECK ONE: IPE IPE AMENDMENT

MY LONG-TERM EMPLOYMENT GOAL IS:

THE DATE THAT I WILL REACH MY GOAL:

| SERVICES | START DATE | END DATE | PROVIDERS | WHO PAYS | PAYMENT METHODS |
|--|------------|----------|-----------|----------|-----------------|
| Primary: | | | | | |
| Secondary: | | | | | |
| Secondary: | | | | | |
| My progress will be measured by (include checkpoint dates): | | | | | |
| | | | | | |

I WILL BE RESPONSIBLE FOR:

DVR WILL BE RESPONSIBLE FOR:

- | | | |
|---|------------------------------|-----------------------------|
| I have been offered the choice to develop my own plan: | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| I have been offered assistance in creating my employment plan: | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| I have been given choices to assist me in creating my employment plan: | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| I have received a copy of my individual rights: | <input type="checkbox"/> Yes | <input type="checkbox"/> No |

For individuals receiving Social Security payments for reasons of disability and have received a Social Security “Ticket to Work” (TTW), please check the most appropriate box below:

- My signature on this Individualized Plan for Employment (IPE) form assigns my Ticket to Work to DVR.**
- Not applicable; no Ticket to Work.**

| | |
|---|-------------|
| Signature (Consumer Representative Signature, If Appropriate) | Date Signed |
| Counselor Signature | Date Signed |

Review Signatures

| | |
|---|-------------|
| Signature (Consumer Representative Signature, If Appropriate) | Date Signed |
| Counselor Signature | Date Signed |

| | |
|---|-------------|
| Signature (Consumer Representative Signature, If Appropriate) | Date Signed |
| Counselor Signature | Date Signed |

W-2's Employability Plan

Can also be found at: http://dcf.wisconsin.gov/forms/pdf/des_10788.pdf

STATE OF WISCONSIN
 DEPARTMENT OF WORKFORCE DEVELOPMENT
 Division of Family Supports

WISCONSIN WORKS (W-2) EMPLOYABILITY PLAN

Personal information you provide may be used for secondary purposes [Privacy Law, s. 15.04(1)(m)].

| | | |
|--------------------|---------|---------|
| PARTICIPANT: | SSN: | PIN: |
| PRINTED ON (DATE): | OFFICE: | WORKER: |

PART 1 – PARTICIPANT EMPLOYMENT AND RELATED GOALS

JOB GOALS DURING PROGRAM PARTICIPATION:

| | JOB TITLE | JOB (DOT) CODE |
|-------------|-----------|----------------|
| PRIMARY: | _____ | _____ |
| SECONDARY: | _____ | _____ |
| ADDITIONAL: | _____ | _____ |

RELATED GOALS NOT REQUIRED FOR PROGRAM PARTICIPATION:

LONG-TERM: _____

SHORT-TERM: _____

**PART 2 – PARTICIPANT PERSONAL GOALS
 (NOT REQUIRED FOR PROGRAM PARTICIPATION)**

| | PLANNED COMPLETION DATE |
|----------|-------------------------|
| 1. _____ | ____/____/____ |
| 2. _____ | ____/____/____ |
| 3. _____ | ____/____/____ |
| 4. _____ | ____/____/____ |
| 5. _____ | ____/____/____ |
| 6. _____ | ____/____/____ |

PART 3 – PARTICIPANT PROGRAM ACTIVITY PLAN
(REQUIRED FOR PROGRAM PARTICIPATION)

The participant program activity will begin on ____ / ____ / ____ and will be reviewed on ____ / ____ / ____.
During this time the W-2 placement is a _____. All W-2 payments may end if a new employability plan is not completed by the review date.

The participant program activity plan will help you meet your goal to get a job. It lists the activities that will assist you in getting a job. Your worker will meet with you to talk about your progress and make changes to your plan, if needed.

| |
|---|
| ACTIVITY 1: _____ HOURS PER WEEK: _____ |
| PLANNED BEGIN AND END DATES: ____ / ____ / ____ TO ____ / ____ / ____ |
| PROVIDER OF SERVICE: _____ |
| LOCATION: _____ |
| SUPPORTIVE SERVICES: CHILD CARE _____ TRANSPORTATION _____ |
| REMARKS: _____ |

| |
|---|
| ACTIVITY 2: _____ HOURS PER WEEK: _____ |
| PLANNED BEGIN AND END DATES: ____ / ____ / ____ TO ____ / ____ / ____ |
| PROVIDER OF SERVICE: _____ |
| LOCATION: _____ |
| SUPPORTIVE SERVICES: CHILD CARE _____ TRANSPORTATION _____ |
| REMARKS: _____ |

| |
|---|
| ACTIVITY 3: _____ HOURS PER WEEK: _____ |
| PLANNED BEGIN AND END DATES: ____ / ____ / ____ TO ____ / ____ / ____ |
| PROVIDER OF SERVICE: _____ |
| LOCATION: _____ |
| SUPPORTIVE SERVICES: CHILD CARE _____ TRANSPORTATION _____ |
| REMARKS: _____ |

ACTIVITY 4: _____ HOURS PER WEEK: _____

PLANNED BEGIN AND END DATES: ____ / ____ / ____ TO ____ / ____ / ____

PROVIDER OF SERVICE: _____

LOCATION: _____

SUPPORTIVE SERVICES: CHILD CARE _____ TRANSPORTATION _____

REMARKS: _____

ACTIVITY 5: _____ HOURS PER WEEK: _____

PLANNED BEGIN AND END DATES: ____ / ____ / ____ TO ____ / ____ / ____

PROVIDER OF SERVICE: _____

LOCATION: _____

SUPPORTIVE SERVICES: CHILD CARE _____ TRANSPORTATION _____

REMARKS: _____

I have agreed that I will do the activities listed in this Employability Plan. I know that I must do these activities to receive my W-2 payments which include child care and transportation. I know if I don't do these activities, (including keeping all appointments, completing up-front job search, accepting a job, and keeping a job), my W-2 payment may be denied, ended, or reduced \$5.15 for each hour I miss. I will contact my worker if I cannot go to my assigned activities.

| | |
|--|-------------|
| SIGNATURE OF THE PARTICIPANT | DATE SIGNED |
| I have provided an explanation of the conditions and requirements for the activities listed, the W-2 participation time limits, and have answered the participant's questions. | |
| SIGNATURE OF W-2 WORKER | DATE SIGNED |
| COMMENTS: | |
| _____ | |
| _____ | |

Appendix 1 Glossary

Acronyms:

CARES - Client Assistance for Re-Employment and Economic Support

CMA - Case Management Agency (Milwaukee W-2 Program only)

CMF - Case Management Follow-up (W-2)

CSJ - Community Service Job (W-2)

DVR - Division of Vocational Rehabilitation

EP - Employability Plan (W-2)

EPC - Employment Planning Consultation

ESP - Employment Supports Planning

FEP - Financial and Employment Planner (W-2)

IPE - Individualized Plan for Employment (DVR)

JDPA - Job Development and Placement Agency (Milwaukee W-2 Program only)

ROI - Release of Information

TAG - Technical Assistance Guide

TANF - Temporary Assistance for Needy Families

W-2 - Wisconsin Works

W-2T - W-2 Transition

DEFINITIONS:

Assistive technology device - any item, piece of equipment, or product system, whether acquired commercially off the shelf, modified, or customized, that is used to increase, maintain, or improve the functional capabilities of an individual with a disability.

DVR Placement - can include job seeking skills, job search and placement assistance, job retention services, follow-up services and follow-along services. Services are determined based upon a consumer's individual needs.

DVR Employment outcome - entering or retaining full-time or, if appropriate, part-time competitive employment in the integrated labor market, supported employment, or any other type of employment in an integrated setting, including self-employment, telecommuting, or business ownership, that is consistent with an individual's strengths, resources, priorities, concerns, abilities, capabilities, interests, and informed choice.

Informed Choice - participants/consumers are provided with opportunities to participate actively and make meaningful decisions throughout the process including: evaluation and assessment services and providers, their employment goals and responsibilities, the services needed to complete their plans for employment, and the service providers and methods used to procure such services. Participants/ consumers may choose to involve family members, advocates and other authorized representatives throughout the process.

Rehabilitation technology - the systematic application of technologies, engineering methodologies, or scientific principles to meet the needs of, and address the barriers confronted by, individuals with disabilities in areas that include education, rehabilitation, employment, transportation, independent living, and recreation. The term includes rehabilitation engineering, assistive technology devices, and assistive technology services.

W-2 Placement - within the W-2 program, an individual may be placed in up to one of ten W-2 placement types, all of which are identified by a CARES W-2 placement code (in parentheses).

- Case Management Follow-up (CMF)
- Case Management Underemployed (CMU)
- Case Management for Participants who were Denied or Declined an Initial or Subsequent Extension (CMD)
- Trial Job (TBJ)
- Community Service Job (CSJ)
- W-2 Transition (W-2 T)
- Case Management Pregnant Women (CMP)
- Case Management Non-Custodial Parent (CMN)
- Case Management Minor Parent (CMM)

Appendix 2

Wisconsin Division of Vocational Rehabilitation

Division of Vocational Rehabilitation (DVR) Resources

This appendix includes information specific to Division of Vocational Rehabilitation. It provides information on Eligibility, how the waiting list works (Order of Selection), and what services DVR can provide.

a. Eligibility/Order of Selection for DVR

Two separate determinations must be made before an individual with a disability receives DVR services:

- Eligibility determination
- Placement on the order of selection waiting list

To be eligible for DVR:

- The individual has a physical and/or mental disability.
- The disability makes it difficult for the person to obtain, retain, and/or advance in employment.
- The individual requires DVR assistance to achieve an appropriate employment goal.

A person is presumed eligible for DVR services if they are receiving Social Security Disability Income (SSDI) or Supplemental Security Income (SSI) and want to work.

Because DVR may not have sufficient resources to provide services to everyone who is eligible, the Rehabilitation Act requires that people with the most significant disabilities be served first. That is the reason for the second determination, placement on the order of selection waiting list. Once an individual has met the test for the eligibility determination, DVR must assess how significantly disabled the individual is. DVR has three categories of severity:

- Most significantly disabled (category 1)
- Significantly disabled (category 2)
- Disabled (category 3)

To be placed in category 1, an individual must have significant functional limitations in three functional areas.

To be placed in category 2, an individual must have a significant functional limitation in one functional area.

To be placed in category 3, an individual would have limitations not determined as significant.

The following defines and gives examples of the functional areas assessed the waiting list. The placement of an individual on the DVR waiting list takes into account how severely disabled the individual is in the following areas:

Mobility

Mobility means the physical, cognitive and psychological ability to get to work from home and to move around a worksite or participate in work activities.

Examples of significant mobility limitations:

1. Person with mental illness who has sufficient anxiety when in public that he/she cannot utilize public transportation effectively
2. Person in a wheelchair who does not have the upper body strength to move around any areas which are carpeted or uneven.
3. Person who has traumatic brain injury and who cannot consistently take the bus independently to work because he/she becomes disoriented when anything unpredictable occurs in their routine.

Communications

Communication means the physical, cognitive, and psychological ability to exchange information effectively when participating in work related activities.

Examples of significant limitations in communication:

1. Individual with hearing impairment who cannot verbally communicate comfortably with hearing co-workers.
2. Individual with specific learning disability who cannot read written instructions from supervisor and translate them into expected work activities.
3. Individual with speech impediment who cannot communicate questions about work to co-workers or supervisors.

Self-Care

Self-care means the physical, cognitive, and psychological ability to perform activities of daily living at a level which allows the individual to participate in work-related activities.

Examples of significant limitations in self-care:

1. Quadriplegic who cannot take care of own toileting needs at work.
2. Diabetic who requires precise timing of meal and snack breaks and cannot work in situations requiring scheduling and work task flexibility and responsiveness to work flow variations.
3. Person with brain injury who cannot remember morning grooming procedures without prompting by an attendant - the attendant does not arrive in time to allow this person to get to work before 10 a.m.

Self-Direction

Self-direction means the physical, cognitive, and psychological ability to initiate, organize, and make decisions in one's own best interest at a level allowing the individual to participate in work-related activities.

Examples of significant limitations in self-direction:

1. Individual with alcoholism who relapses every 2-3 months and goes on multi-day binge not allowing him/her to report to work.
2. Individual with specific learning disability who cannot independently find work to do to keep busy, or to appear busy, at work.
3. Individual with history of depression who cannot apply for promotions because of depression and medication related lethargy.

Interpersonal Skills

Interpersonal skills means the physical, cognitive, and psychological ability to establish and maintain relationships with others at a level which allows the individual to participate in work-related activities.

Examples of significant limitations in interpersonal skills:

1. Individual with personality disorder who makes co-workers frightened and uncomfortable.
2. Individual with hearing impairment who speaks with exaggerated affect, which is normal in the deaf community, but which makes co-workers think he/she is angry or over-bearing.
3. Individual with depression who is socially isolated and unable to participate in the expected break room camaraderie of after-hours activities. Therefore, co-workers think he/she is stuck up and unfriendly.

Work Tolerance

Work tolerance means the physical, cognitive and psychological ability to meet the demands of participating in work-related activities. (For example, how long and under what conditions can the individual work?)

Examples of significant limitations in work tolerance:

1. Individual with anxiety disorder who cannot work when panic attacks occur. Requires very flexible scheduling to accommodate unexpected anxiety.
2. Individual with back injury who can only work four hours per day because of pain.
3. Individual with carpal tunnel syndrome who cannot manipulate with hand and finger dexterity consistently. Drops objects frequently because of lack of strength in hands.

Work Skills

Work skills mean the physical, cognitive, and psychological ability to meet employment expectations for entry-level workers (or in the case of someone who is already employed, the expectations of employers for someone at that level of employment). In other words, is there a reasonable expectation that this person could obtain some kind of work or participate in work-related activities without training?

Examples of significant limitations in work skills:

1. Individual with 8th grade education who has lifting restriction of five pounds because of back injury. Cannot perform unskilled labor.
2. Individual with brain injury who does not know how to stay on task for longer than five minutes without disrupting the work of co-workers.
3. Individual with specific learning disability who cannot fill out job applications or personnel papers as expected of new employees.

b. What is the role of a DVR counselor?

The role of the DVR counselor is that of vocational planning and support. Responsibilities of the DVR counselor would include any or all of the following:

- **Outreach:**

Sharing of information on the Division of Vocational Rehabilitation (DVR) program, its policies, and process to W-2 staff, participants, and other interested team members or community members. DVR provides outreach which will minimally include:

- Purpose of the Vocational Rehabilitation Program
- Eligibility requirements
- Application procedures
- Scope of services available to eligible students

- **Employment Planning Consultation:**

Providing W-2 program participants who have not yet applied for vocational rehabilitation services with assistance, strategies and creative ideas for identifying their employment goal, needs for services, and concerns to be addressed in achieving those goals. Topics may include information on disabilities, assessments, assistive technology, accommodations, community resources, labor market and employment. DVR does not bear any financial or ongoing counseling responsibilities under this definition unless the participant has an active individualized plan for employment (IPE) with DVR.

- **Information/Referral:**

To community programs and services that may assist an individual in reaching their employment and independent living goals.

- **Rehabilitation Counseling and Planning:**

Occurs when the individual is eligible for DVR and is no longer on the waiting list. Rehabilitation counseling will include assistance in the development of employment goals that are appropriate given a consumer's needs, priorities, strengths, preferences, abilities, capabilities, and interests and will be present throughout the entire VR process.

- **Service Provision:**

Services provided by DVR are individualized, and will be according to an approved Individualized Plan for Employment (IPE). All services provided by DVR will be directly related to the establishing and achieving a job goal. (See [Service Provision](#) section, Page 17.)

c. DVR Authorization for Release of Confidential Information Form

A copy of the DVR Authorization for Release of Confidential Information form can be found at http://dwd.wisconsin.gov/dwd/forms/DVR/doc/dvr_199_e.doc.

d. DVR Process Chart



This information is funded by Rehabilitation Services Administration WI Client Assistance Program grant H161A040054.

Appendix 3

Wisconsin Works (W-2) Overview

A Place for Everyone, a System of Employment Supports

Wisconsin Works (W-2) replaced Aid to Families with Dependent Children (AFDC) in September, 1997. W-2 is based on work participation and personal responsibility.

Under W-2, there is no entitlement to assistance, but there is a place for everyone who meets eligibility requirements and is willing to work to their ability. The program is available to low-income parents with minor children. Each W-2 eligible participant meets with a Financial and Employment Planner (FEP), who helps the individual develop a self-sufficiency plan and determine his or her place on the W-2 employment ladder. The ladder consists of four levels of employment and training options, in order of preference:

1. **Unsubsidized Employment:** Individuals applying for W-2 are first guided to the best available job opportunity. The W-2 agency supports the participant's efforts to secure employment through job search assistance. Once employed, participants may receive additional W-2 services to help them adjust to their new work environment and build skills that promote career advancement opportunities. Individuals in unsubsidized employment may be eligible for the state and federal Earned Income Credit, FoodShare, Medicaid, child care assistance to work or attend training, and Job Access Loans. The unsubsidized employment non-payment placements include Case Management Unsubsidized Employment (CMU) and Case Management Follow-up (CMF).
2. **Trial Jobs (Subsidized Employment):** Individuals who have the basic skills, but lack sufficient work experience to meet employer requirements, may be placed in a Trial Job. Through a Trial Job contract, the employer agrees to provide the participant with on-the-job work experience and training in exchange for a wage subsidy. Trial Jobs are expected to result in permanent employment. The employer must pay the participant a wage comparable to regular employees in similarly classified positions. Trial Job participants may be eligible for the state and federal Earned Income Credit, FoodShare, Medicaid, child care assistance, and Job Access Loans.
3. **Community Service Jobs (CSJs):** CSJs are developed for individuals who lack the basic skills and work habits needed in a regular job environment. CSJ positions offer real work training opportunities, but with the added supervision and support needed to help the participant succeed. CSJ participants receive a monthly grant of \$673 for up to 30 hours per week in work training activities and up to 10 hours a week in education or training. Individuals who are employed part-time, but have personal barriers that prevent them from increasing their work hours, may be placed in a part-time CSJ position with prorated benefits.

Under certain circumstances, CSJ participants may be eligible to meet their participation requirements through a combination of 25 hours of work training activities and up to 15 hours of class time in a technical college program. In addition to a cash grant, CSJ participants may be eligible for FoodShare, Medicaid, child care assistance, and Job Access Loans.

4. **W-2 Transition (W-2 T):** W-2 T is reserved for those individuals who, because of severe barriers, are unable to perform independent, self-sustaining work. W-2 T participants receive a monthly grant of \$628 for up to 28 hours per week of participation in work training or other employment-related activities; and up to 12 hours per week in education and training. Under certain circumstances, W-2 T participants may be eligible to meet their participation requirements through a combination of 25 hours of work training activities and up to 15 hours of class time in a technical college program. In addition to a cash grant, W-2 T participants may be eligible for FoodShare, Medicaid, child care assistance, and Job Access Loans.
5. While placements on one of the four rungs of the W-2 ladder are only available to eligible custodial parents, noncustodial parents, minor parents and pregnant women may be eligible for an array of case management services. In addition, a custodial parent of an infant 12 weeks old or younger may be eligible for a \$673 W-2 cash benefit.

Time Limits

W-2 participants are limited to 24 months in a single employment position category (Trial Jobs, CSJs, or W-2 T.) The maximum lifetime limit is 60 months. Extensions may be available on a limited basis when barriers exist that prevent employment.

Employment Supports

A major part of W-2 consists of the related support services and features designed to facilitate access to and sustain employment.

- **Job Centers** combine job search, job opportunities, education, training, and W-2 services in one location. This promotes integrated access to many related services.
- **Local Children's Services Networks and Community Steering Committees** organize community leaders to coordinate resources leading to self-sufficiency.
- **Child Support** partial or full payments are provided to W-2 custodial parents with the CS amount determined by each case situation. Child support (CS) received does not cause a reduction of the W-2 benefit payment.
- Wisconsin Shares Child Care is available to most low-income working families. Families pay a co-payment based on their income.
- **Job Access Loans (JALs)** are available to help families meet immediate financial needs that may prevent them from working--like car repairs and personal emergencies.

- **Transportation Assistance** ensures that parents can get their children to day care and themselves to work.
- **Health Care** is available through Medicaid/BadgerCare.
- **Workforce Investment Act (WIA) Program** offers employment placement/retention, job training and education-related training services. Services are available to both adults and youth and are delivered through the Job Centers.

Additional fact sheets describing different aspect of the W-2 program can be accessed at : <http://www.dcf.wisconsin.gov/w2/w2factsheet.htm>

Appendix 4 Comparison Chart

DVR and W-2 Staff can consult with each other at any stage of the process to ask about assessments, job or activity accommodations, individual barriers, and/or community resources for individuals. Consultation using an appropriate release of information can be done without opening a case with either agency. The purpose of consultation is to share information or experiences that may result in solutions for the individual.

| Eligibility/Wait List | Develop the Plan | Ongoing Assessment of the Plan | Getting the Job | Keeping the Job |
|---|--|---|---|---|
| <p>Eligibility for W-2 is based on the participant meeting non-financial and financial requirements.</p> <p>Eligibility for DVR is based on barriers to employment caused by disability.</p> <p>DVR has a waiting list for services. Severity of disability and application date determines the order of selecting names from the wait list. (Order of Selection)</p> | <p>An eligible/active participant/consumer of either program begins by working with staff to gather information through an assessment process to develop the Employment Plan including:</p> <ul style="list-style-type: none"> ▪ Identify job goals ▪ Identify job barriers ▪ Look at the labor market ▪ Look at work history ▪ Identify services to address barriers ▪ Identify supports to address barriers ▪ Identify a plan of action to find the job | <p>If a person is active in both programs, the job goal, services, and progress measures should be complimentary if not the same. One program cannot limit or expand the services of the other program.</p> <p>As service needs are identified, assess and address those needs.</p> <p>Examples of service needs may include assistance with:</p> <ul style="list-style-type: none"> ▪ Insufficient money management ▪ AODA issues ▪ Domestic violence ▪ Lifting restrictions ▪ Mental health issues | <p>Examples of W-2 job readiness activities may include:</p> <ul style="list-style-type: none"> ▪ Application and resume assistance ▪ Job Skills Training ▪ Work Experience ▪ On site mentoring ▪ Educational activities <p>Examples of DVR job readiness tools may include:</p> <ul style="list-style-type: none"> ▪ Temporary Work ▪ Application and resume assistance ▪ Job Skills Training ▪ On the Job Training ▪ Apprenticeships ▪ Job coaching ▪ On site mentoring <p>For additional information, <i>please refer to the Service Provision section, Page 17.</i></p> | <p>W-2 follow up on job retention is 1 year.</p> <p>DVR follow up on job retention is 90 days (minimum) and can be extended when appropriate.</p> <p>Common retention issues include::</p> <ul style="list-style-type: none"> ▪ Money management ▪ Medication management ▪ Medical management ▪ Relationship management ▪ Child care issues ▪ Transportation issues |

Appendix 5 Conflict Resolution

General procedures for intra and inter agency disputes:

A. For the resolution of disputes arising over issues addressed in this agreement, all parties will utilize the appropriate steps and methods as described herein. Attempts will be made to resolve the issue at the lowest level of disagreement. Informal resolution will be the first step in dealing with any disagreements relative to this agreement.

- **Examples beginning with field staff:**
- **Counselors / Case Managers**
- **Supervisors/Managers**
- **Directors**
- **Bureau Directors**
- **Deputy Administrators**
- **Administrators**

When an issue cannot be resolved at the lowest level, it should be referred to the next level as a formal dispute. Formal disputes under these procedures are to be submitted in writing at the appropriate local or state level. The materials presented will include: the regulation or requirement related to the dispute; the specific issue needing resolution; the prior steps taken to resolve the issue and any additional information that may be relevant to the dispute. Utilizing the information presented, a good faith effort will be made to reach a mutually satisfactory solution. Efforts must be made at each level for resolution in a timely manner.

B. Conflict resolution between participant/consumer and DVR or W-2:

Participants/Consumers or their legal guardians have the right to appeal DVR or W-2 decisions regarding eligibility, services, and other aspects of the IPE or EP. In these situations, an appeal should be filed following program appeal procedures.

C. Resolution of state department intra-agency disputes:

This agreement recognizes that each agency has its own administrative mechanisms for the timely resolution of internal disputes. This agreement recognizes these procedures and permits each agency to resolve its own internal disputes.

D. Resolution of state department interagency terms of agreement disputes:

When a formal dispute arises between agencies regarding the terms of this agreement the party seeking clarification shall use the following procedure for resolution:

1. The issue will be referred to the respective division administrator or their designees for resolution.
2. If unresolved by division administrators, the issue will be referred to the highest level within the agencies for resolution.
3. All necessary steps in the resolution under this section shall occur within 60 days from referral to division administrators. If acted on in good faith with just cause and through mutual consent, an extension may be granted.