

## Chapter DWD 17

### INCOME MAINTENANCE WORKERS

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**Note:** Chapter HSS 217 as it existed on October 31, 1999 was repealed and a new chapter DWD 17 was created effective November 1, 1999.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. 49.33 (3) and 49.143 (2) (c), Stats., to ensure that each income maintenance worker employed by a county agency, tribal agency, or W-2 agency has successfully completed a training program to achieve acceptable IM worker job performance. Successful completion of prescribed training is required for all new IM workers. The department shall make ongoing training available for experienced IM workers.

(2) **APPLICABILITY.** This chapter applies to county income maintenance agencies, tribal income maintenance agencies, W-2 agencies, and the income maintenance workers employed by those agencies.

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

**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 income maintenance programs.

(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) "County agency" means the agency established under ss. 46.215, 46.22, or 46.23, Stats.

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

(6) "Eligibility determination" means the act or process by which the situation of a person or a group is compared to a set of standards to determine whether the person or group meets the criteria for receiving a specific type of income maintenance.

(7) "Experienced IM worker" means an IM worker employed by a county, tribal or W-2 agency before December 1, 1999, or an IM worker who has completed initial income maintenance training.

(8) "Financial and employment planner" or "FEP" has the meaning given in s. 49.141(1) (d), Stats.

**Note:** "Financial and employment planner" or "FEP" is defined in s. 49.141 (1) (d), Stats., as "a caseworker employed by a Wisconsin works agency who provides financial or employment counseling services to a participant."

(9) "Food stamps" means the federal food stamp program under 7 USC 2011 to 2036.

(10) "IM handbooks, manuals, and instructional materials" means department-issued income maintenance handbooks, manuals, and memos that are addressed to county agencies, tribal agencies, and W-2 agencies and set forth eligibility and benefit criteria and case maintenance and case processing information for Wisconsin works, food stamps, and Medicaid.

(11) "Income maintenance" or "IM" means Wisconsin works, food stamps, or Medicaid.

(12) "Income maintenance worker" or "IM worker" has the meaning given in s. 49.33 (1) (c), Stats.

**Note:** 2001 Wis. Act 16 repealed s. 49.33 (1) (c), Stats.

**Note:** Section 49.33 (1) (c), Stats., defines "income maintenance worker" as "a person employed by a county, a governing body of a federally recognized American Indian tribe or a Wisconsin works agency whose duties include determinations or redeterminations of income maintenance program eligibility."

An income maintenance worker in a particular agency may have a different job title depending on his or her job function, such as economic support specialist, supportive service planner, resource specialist, or financial and employment planner.

(13) "Medicaid" or "MA" means a medical assistance program operated by the department of health and family services under Title XIX of the Social Security Act of 1935, as amended, and ss. 49.43 to 49.497, Stats.

(14) "New IM worker" means a person who is employed by a county agency, tribal agency, or W-2 agency as an IM worker on or after December 1, 1999, including a permanent employee who transfers into an IM worker position and who has not completed initial income maintenance training.

(15) "Tribal agency" means an agency designated by the elected tribal governing body of a federally-recognized Wisconsin Indian tribe or band and contracted by the department to administer Wisconsin works, Medicaid, or food stamps.

(16) "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."

(17) "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."

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

**DWD 17.03 Initial income maintenance training.**

(1) The department shall make initial IM worker training available to new IM workers directly or through contractors. The county agency, tribal agency, or W-2 agency shall ensure that each new IM worker completes the department's initial training during the first 6 months of employment.

(2) The new IM worker shall not make independent decisions related to eligibility for income maintenance programs or perform case management functions until the initial income maintenance training is successfully completed. Successful completion requires attendance for all class hours and involvement and participation in all instructional activities. The county agency, tribal agency, or W-2 agency shall develop evaluation strategies to ensure that the new IM worker achieves a minimum standard of competence.

(3) (a) *All new IM workers.* The department shall develop a standardized curriculum for training new IM workers. The approved curriculum shall include courses, independent study, and closely supervised practical experience that total at least 100 hours 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 program philoso-

phy, policy and procedure, eligibility determination, case management, interpersonal skills, and automated systems.

(b) *Financial and employment planners.* The standardized curriculum for new IM workers serving as financial and employment planners shall include:

1. Policy and procedure in IM handbooks, manuals, and instructional materials.

2. Automated systems used in IM programs.

3. Interpersonal skills needed to perform IM functions.

4. Case management information and skills, including:

a. Employment and training information for W-2 participants, including job readiness assessment, training opportunities, job search activities, labor market information, and job retention skills.

b. Special needs of the W-2 participant or a family member that 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.

(4) A county agency, tribal agency, or W-2 agency may develop its own training to implement the DWD standardized curriculum under sub. (3), with approval by the department. A county agency, tribal agency, or W-2 agency that chooses not to participate in the initial training for new IM 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 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) State how IM handbooks, manuals, and instructional materials will be used.

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

(d) Specify the number of hours of supervised practical experience, including the use of automated systems, IM 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 IM training implementation plan to: Training Section, DWD Division of Economic Support, P.O. Box 7935, Madison, WI 53707-7935.

A copy of the department's training schedule for new and experienced workers may be obtained by writing the above address.

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

**DWD 17.04 Ongoing training for experienced IM workers.** (1) The department shall develop an ongoing course or courses for experienced IM workers 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) Policy and procedure in IM handbooks, manuals, and instructional materials.

(b) Automated systems used in IM programs.

(c) Interpersonal skills needed to perform IM functions.

(d) Enhanced case management information and skills, including:

1. Employment and training information for W-2 participants, including job readiness assessment, training opportunities, job search activities, labor market information, and job retention skills.

2. Special needs of the W-2 participant or a family member that 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.

(2) **COMPARABLE TRAINING.** A county agency, tribal agency, or W-2 agency may develop its own training to implement the DWD standardized curriculum under sub. (1), with approval by the department. A county agency, tribal agency, or 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 IM training implementation plan to: Training Section, DWD Division of Economic Support, P.O. Box 7935, Madison, WI 53707-7935.

A copy of the department's training schedule for new and experienced workers may be obtained by writing the above address.

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

**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 county agency, tribal agency, and W-2 agency shall ensure that new and experienced IM workers are trained in a timely manner on all IM policy and procedure and automated system updates that are issued by the department.

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

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

**DWD 17.07 Reports and records.** (1) **ANNUAL REPORT OF ALL IM WORKER TRAINING.** Each county agency, tribal agency, and W-2 agency shall submit to the department by February 1 of each calendar year a report that documents training completed by all new and experienced IM workers during the previous calendar year.

(2) **REPORT OF INITIAL IM WORKER TRAINING.** Each county agency, tribal agency, and W-2 agency shall submit to the department by the first day of each month a list of IM workers who are required to complete initial IM worker training.

(3) **PERSONNEL FILE.** Each county agency, tribal agency, and W-2 agency shall include in the personnel file of all new and experienced IM 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 county, tribal, or W-2 agency shall make the training records available to the department upon request.

**Note:** Send the monthly list of IM workers who are required to complete initial IM worker training and the annual report on training to: Training Section, Division of Economic Support, P.O. Box 7935, Madison, WI 53707-7935.

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