BRP Technical Assistance

Operations Memo 23-06

Operations Memo 23-07

What is Technical Assistance?

- Technical Assistance (TA) is like training; it is targeted support related to program administration, usually on a very specific topic.

- Invites for TA on published Ops Memo content will be sent to a comprehensive list of partners; please forward to any staff and let us know when you want someone added to the list.

- Attending TA pertaining to Ops Memos is voluntary! Partners are responsible for any written requirements detailed in published OMs.

What is an Operations Memo?

- Generally provides information related to a change in operations and/or requirements, called "ops memos" or "OMs"

- Published on the Bureau of Refugee Programs website, on the policy page (https://dcf.wisconsin.gov/refugee/providers/policy/memos)

- Email notifications are sent to the same comprehensive list of partners whenever OMs are published.

OM 23-07:
Introduction of Two New BRP Forms

- Introduces two forms:
  - BRP Participation Agreement
  - Confidential Information Release and Discussion Authorization
- Effective October 1, 2023
- Introduces the document upload feature of the Wisconsin Refugee Programs Database (WRPD)

DCF Forms Search Page

- dcf.wisconsin.gov/forms (linked in OM 23-07)
- Search by the **full, specific name of the form** (Other forms exist that contain the words "Confidential Release" in the title, for example) and download.

WRPD Document Download

- Demonstration

BRP Participation Agreement

- Required for all BRP-enrolled participants
- Must be completed and downloaded into WRPD within 10 working days of program enrollment
- Intended to inform participants about the basic scope of BRP programs they are enrolled into, and document that they have been informed.

Confidential Information Release and Discussion Authorization

- Use as needed! Not required for everyone.
- "[This form] must be completed upon enrollment for any participant about whom information must be shared, outside of other BRP programs and/or as needed while discussing case details with… interested third parties."
- Must be uploaded into WRPD within 10 working days
- Intended to cover legal release of information requirements and authorize/facilitate discussions with third parties (e.g. sponsors)

OM 23-06:
Verification and Documentation Requirements Policy

- Summarizes existing policy on documentation
- Includes additional, detailed verification and documentation policy
- Effective October 1, 2023

Current Policy

- Found in the Contract addendum called the Scope of Services
- Covers basics:
  - Requirement to use WRPD
  - Requirement to record services and/or case notes within 10 working days of the service
  - Requirement to verify eligibility and collect demographic information
  - Requirement to maintain group/class-level documentation, if applicable
  - Record retention requirements

New Policy

Current policy still applies, plus newly introduced documentation and verification policies

What is documentation?

- Documentation means recording information about a case or individual.
  - Examples: case notes, case comments, recording a service in WRPD

What is verification?

- Verification means providing evidence that documentation is true.
    - Examples: Uploading a copy of an I-94, Social Security card, check stub

New Policy: Case Notes vs. Comments

- Either may be used in WRPD

- Only differences between case notes and case comments:
  - Different names
  - Different locations in WRPD
  - Different ways of viewing them

New Policy: 10-day Time Limit

- Previous policy stated "Sub-recipient must enter all required records into the WRPD within 10 working days of the occurrence to be recorded"
- This still applies! Other 10-day requirements now include:
  - Completing all documentation requirements
  - Completing all verification requirements

What Documentation and Verification Requirements?

- Everything outlined in Table 2 of the Ops Memo
- If it cannot be found in Table 2, then no additional documentation or verification is required. Simply entering the information (demographic info, recording a service, etc) into WRPD is sufficient.
  - There are approximately 175 total service or data fields in WRPD; only 21 of them appear in Table 2!

Documentation and Verification Requirements, Continued

Table 1: WRPD Document Categories

WRPD Document Category	Example Documents
DCF Published Forms*	Release of Information Individualized Employability Plan (IEP)
Immigration-Related Documents	I-94 Passport with eligible stamps Employment Authorization Document with eligible code Order of Release on Recognizance form
Other ID Verification Documents	SSN card Drivers License State ID
Other Supporting Documentation	Check stub Appointment confirmation Class attendance sheet

*BRP may require using certain forms, which will be detailed in the Scope of Services and/or the BRP Policy Manual, and announced via operations memos.

Table 2

It is only necessary to verify information in Table 2 once. If one of the acceptable sources of verification is already present in WRPD at the time of program enrollment, use the existing documentation to verify, but note that all program staff are responsible for ensuring that program's requirements have been met.

OM 23-06

New Policy: Other Details

- Backdating
- Documentation Best Practices
- Databases other than WRPD

Questions?

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