

Agenda and Minutes



W-2 Contractors' Meeting

Location: MS Teams

Date: March 30, 2022

Time: 10:30 a.m. – 12:00 p.m.

Invitees

- | | | |
|---|---|--|
| <input checked="" type="checkbox"/> Mac Strawder (DCF) | <input checked="" type="checkbox"/> Minette Knotts (DCF) - note taker | |
| <input checked="" type="checkbox"/> Tony Dziedzic (FSC) | <input checked="" type="checkbox"/> Jennifer Marks (FSC) | <input checked="" type="checkbox"/> Stacey Eggen (FSC) |
| <input checked="" type="checkbox"/> Brian Wolfe (FSC) | <input checked="" type="checkbox"/> Sarah Kaminski (Equus WS) | <input type="checkbox"/> Steve Reinhold (Equus WS) |
| <input checked="" type="checkbox"/> Kanwen Shao (Equus Workforce Solutions) | <input type="checkbox"/> Christian Blaisdell (WRI) | <input checked="" type="checkbox"/> Jody Conner (WRI) |
| <input checked="" type="checkbox"/> Carolyn Frogness (WRI) | <input checked="" type="checkbox"/> Gina Brown (WCI) | <input checked="" type="checkbox"/> Shannon Franek (WCI) |
| <input checked="" type="checkbox"/> Vang Lee (AWWI) | <input checked="" type="checkbox"/> Carlyle Outten (AWWI) | <input type="checkbox"/> David Frechette (UMOS) |
| <input checked="" type="checkbox"/> Nicole Hagen (Ross) | <input checked="" type="checkbox"/> Reno Wright (Ross) | <input checked="" type="checkbox"/> Parker Rios (UMOS) |
| <input checked="" type="checkbox"/> Sandra Salazar-Lozano (UMOS) | <input checked="" type="checkbox"/> Jodi Prout (UMOS) | <input type="checkbox"/> NaTasha Chevalier (UMOS) |
| <input type="checkbox"/> Dallas Hawkins (UMOS) | <input type="checkbox"/> Rachel Zietlow (MAXIMUS) | <input checked="" type="checkbox"/> Neng Thor (MAXIMUS) |
| <input checked="" type="checkbox"/> Autumn Morgan (MAXIMUS) | <input checked="" type="checkbox"/> Randy Endsley (MAXIMUS) | |

Representatives from Department of Children and Families, Division of Family and Economic Security, Bureau of Analytics and Research, Bureau of Refugee Programs, Bureau of Regional Operations, Bureau of Working Families, and Partner Training Team were also in attendance.

Conference Line

Skype Meeting

Join by phone: (608) 316-9000, 51884694#

Agenda Items

1. WELCOME & INTRODUCTIONS / STAFF UPDATES

Owner: Mac Strawder

Time Allotted: 10 minutes

Details: roll call

Discussion:

- Mac conducted roll call.
- Patara shared staff updates:
 - Xiaoming Ma started her position as a Research Analyst for the Bureau of Child Support in 2019. She is transitioning back to the university setting with a position at the University of Wisconsin-Madison on April 8, 2022.
 - Tyler Platz came to the Bureau of Working Families in 2020 as a Research Analyst. He is also returning to the field of higher education as a Data Analyst at Southwest Wisconsin Technical College on April 8, 2022.
 - Minette Knotts started as an Operations Program Associate withing the Bureau of Working Families & Bureau of Refugee Programs in 2020. She is transitioning back into the legal field with a position at Milwaukee County Circuit Courts on April 15, 2022.
 - John Tuohy is retiring and will be serving as the Executive Director for the Wisconsin County Human Services Department.
 - Sierra Hartman is the new Refugee Programs Coordinator in the Bureau of Refugee Programs.

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2. TAX CREDIT AWARENESS & OUTREACH

Owner: Audrey Evert
Time Allotted: 5 minutes

Details:

- Update and/or discussion

Discussion:

- The American Rescue Plan Act increased the amounts and enabled families and workers to get the full value of these tax credits regardless of how much they owe in taxes.
- Claiming tax credits will not impact eligibility for Federal or State benefits funded Federally.
- Claiming tax credits will not affect immigration status, ability to get a green card, or your future eligibility for immigration benefits.
- Please see PowerPoint presentation below for reference:



Tax Credit Outreach
PPT pdf.pdf

3. DEMO OF W-2 AND EA MANUAL UPDATE

Owner: Abby Harrison
Time Allotted: 5 minutes

Details: update and/or discussion

Discussion:

- In relation to history and anyone accessing the Wisconsin Works (W-2) Manual, updated to show better understanding of history of previous pages. Information is available on cover sheet published via the listserv and working to get Emergency Assistance (EA) Manual listserv sent.
- When viewing the screen reader friendly version highlighted text in PDF version indicate manual updates from previous version.
- There is a table explaining changes in the updated released version.

4. WEBI AND WORK PARTICIPATION RATE (WPR) REPORTS

Owner: Pete Shay
Time Allotted: 15 minutes

Details: update and/or discussion

Discussion:

- Two new WPR reports out now.
- Additional increase in WPR is largely improved and is contributed by the following:
 - Using employment associated with employment record to determine how many hours someone is working.
 - Looking at new participation data rather than non-participation data.
 - Improvement on determining who is work eligible individual for WPR.
- New WPR reports are for July 2022 on.
- WPR breakdown by FEP ID is still in progress, it is fixed but not validated yet.
- Combined reports to be multiple tabs. WPR-01 WPR details for July 2022 onward.
- Working with BITS IT to finalize design of data warehouse to create reports.
- Focusing on RP reports and all other things in backlog.
- Webi lunch and learn for end of April or early May to be scheduled.

5. OVERVIEW OF OPERATIONS MEMOS (OM) 22-07 AND 22-08

Owner: Maureen Purcell

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Time Allotted: 10 minutes

Details: update and/or discussion

Discussion:

- OM 22-07: COVID-19 Policy Adjustments Incorporated in Permanent Policy
 - Financial eligibility determination for Emergency Assistance (EA).
 - In-person meeting requirements for Wisconsin Works (W-2) and EA.
 - Types of signatures accepted for W-2, EA, and Job Access Loans (JAL).
- OM 22-08: Clarifications to Obtaining a Formal Assessment for W-2 T Placements
 - New policy.
- See PowerPoint presentation below for reference:



OM 22_07 and 22_08
Presentation_March 31

- Any questions should be sent to The Policy SharePoint at <https://share.dcf.wisconsin.gov/bwfpolicy>.

6. RCA AND RMA ELIGIBILITY PERIOD EXTENSION

Owner: Tom Targos

Time Allotted: 5 minutes

Details: update and/or discussion

Discussion:

- The Office of Refugee Resettlement (ORR) is announcing the publication of the Federal Register Notice, Extending Refugee Cash Assistance and Refugee Medical Assistance From 8 Months to 12 Months.
 - In accordance with ORR regulations, the Director of ORR is announcing the expansion of the Refugee Cash Assistance (RCA) and Refugee Medical Assistance (RMA) eligibility period from 8 months to 12 months of assistance for participants whose date of eligibility for ORR benefits is on or after October 1, 2021. Please see the attachment below for additional information.



ORR -
2022-06356.pdf

- ORR Dear Colleague Letter (DCL) 22-12, Expansion of the Refugee Cash Assistance and Refugee Medical Assistance Eligibility Period will be posted to the ORR web site in the near future.
- The Bureau of Refugee Programs is working on an Administrator's Memo.
- Please contact Tom Targos at tom.targos@wisconsin.gov and Sierra Hartman at sierra.hartman@wisconsin.gov with any questions that arise.

7. SSI/SSDI INQUIRY

Owner: Adam Bozich

Time Allotted: 15 minutes

Details: update and/or discussion

Discussion:

- The Social Security Administration has agreed to provide a brief presentation to this group in the future.
- Adam asked agencies the following questions:
 - Is your agency engaging in conversations with participants to inform them that there are SSI and SSDI activities?
 - Does your agency have activities that are helping or advocating for participants that are trying to get an SSI or SSDI determination?

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- What are some barriers that your agency faces in trying to help participants with this?
- Does your agency have specific staff providing SSI/SSDI advocacy work or do you subcontract with any organization that provides this type of work?
- Linda Richardson added for everyone's reference: The Scope of Work pages 17-19 outlines the W-2 agencies responsibilities in relation to individuals for SSI/SSDI. Including "Contractors shall maintain staff who possess a working knowledge of Social Security Administration (SSA) guidelines used to determine SSI/SSDI eligibility including, but not limited to, the forms needed to apply for, and the methods used by SSA when determining eligibility."
- AWWI
 - Meeting with W-2 Transition (W-2 T) participants and are communicating with participants that are SSI/SSDI bound that cannot work.
 - AWWI runs a Ticket-to-Work program which is reverse of SSI and use coordinator often for information as a resource.
 - Carlyle and Vang put together a service agreement with vocational assessment to determine with situation if able to join workforce in terms of activities.
 - With COVID-19, AWWI is limited with in-person services especially this population. Have people focus on immediate need on housing and it is more challenging with this population.
 - Specific staffing – no contractor and utilize coordinator for Ticket to Work program. Workers handling W-2 T and refer to sole program and outreach to help participant step-by-step to apply for SSI. Referring to Community Advocates as well to assist with appeals and applying. Also send participants to Legal Action of Wisconsin (LAW) for those needing assistance with appeals.
 - Vang shared the following link for free or low-cost fee legal services
<https://law.marquette.edu/assets/community/pdf/Civil-Legal-Aid-Flyer.pdf>.
- MAXIMUS
 - Autumn shared that they have activities to help with applications or assistance to connect with resources and application process.
 - Barriers – timeliness in submitting documentation, completing activity log correctly, refer participants to LAW and Community Advocates for legal assistance.
- Ross
 - Yes, conversations taking place with participants during formal assessments.
 - Given referrals to attorneys and have some that offer pro bono services with formal agreements with Ross.
 - Onsite license official counselor that has made referral suggestions after meeting with participants and completed second opinion assessments and mental health assessments.
 - Barriers – new FEPs and lack of internal knowledge of SSI/SSDI process in knowledge. Contacted SSA to request overview and training to FEPs via Zoom. Have someone on staff internally that has helped participants to advocate for this service and assists in filling out applications and provide training to new staff. Application process in general is complicated and lengthy participants' mention. Help find a physician and timeframe for appointment conflicts with timeline as wait is so long which prolongs process.
 - Online training from SSA on SSI/SSDI application process would be beneficial to Ross.
- UAMOS
 - Staff continue to inform participants that they may pursue SSI/SSDI benefits through the SSA and work to gain approval on this. Staff continue to have conversations with them about the SSI/SSDI application process, obtaining updated formal assessment through their health providers and seeking legal assistance through legal advocates and representatives throughout the community.
 - Currently each FEP works with participants individually to meet their needs. UAMOS continues to help participants with facilitating phone calls to SSA, legal providers, their health providers, DVR, etc. If they have a current case with the SSA, we continue to collect that information to see where they are at with their case.
 - Caseloads are high at the moment so we are doing what we can with each participant until our new staff are trained and more are hired. Also, the waiting period for decisions from the SSA is also long

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- which makes it seem that participants with more severe barriers stay with us for a long time resulting in a higher life of a W-2 case which includes us working with them more on the basics to maintain their case is a good status such as EP review, eligibility review, extensions, monthly contact, collection of formal assessment documentation at its expiration or review date, etc.
- At the moment the agency does not but did last year when staffing levels were higher.
 - Equus
 - This is completed by EQUUS W-2 case managers during regular ongoing, Employability Plan (EP), and review appointments email communications (FEP: Participant) are also used between scheduled appointments discussing SSI/SSDI activities and progress
 - Appointments with medical, mental /physical health providers for documents that support SSI / SSDI case. Ongoing therapy/counseling activities with medical, mental/physical health providers that support the participant during the SSI/SSDI claim Assist with application forms. Referrals to DVR and their activity recommendations.
 - EQUUS W-2 case managers focus on what a participant can accomplish which at times conflicts with what a participant wants/thinks they can accomplish. SSI/SSDI track participants sometimes exhibit a low desire to participate in basic activities that offer accommodations (Online job club, online Work Experience (WEX) activities, completing basic online courses, GED/HSED activities). Extended response times from medical providers.
 - Racine County Opportunity Commission (RCOC) completes formal assessments and activity recommendations. The EQUUS W-2 Project may use the Action Review Group (which is part of EQUUS Workforce Services) evaluates the strength of SSI/SSDI applications.
 - FSC
 - Some conversation come through while doing informal assessments. Many participants are aware of SSI process prior to coming to agency and are currently in application or appeal process.
 - Activities – using work experience, some levels of training and online coursework, mental health counseling activities, using activities to get medical capacitation needed and medical appointments needed to help with their cause. Key referral player is Aging and Disability Resource Centers (ADRC) <https://www.dhs.wisconsin.gov/adrc> to assist with paperwork completion and attorney connections.
 - Barriers – many participants have had past denials and work to get participant to focus on what they can do vs. what they cannot do. Not always able to get relevant information back to support case and can have lack of participation from participant (transportation, child care issue, etc.).
 - Have had specific staff with background in SSI and sometimes those staff turnover. Quality Assurance team is equipped what SSI is and policies that go along with it. Have a few specialized staff that work with W-2 T and thereby have learned about SSI process as they are working with W-2 T population and have go to staff in regions that know the process to best of their ability and become residential experts. Contracts developed with vocational assessment providers to provide indications where they think participant can go in relation to SSI and SSDI.
 - WCI
 - Depends on participant and formal/informal assessments and what stage of SSI and SSDI process they are in.
 - Activities depend on participant and their situation. Online training opportunity available and work directly with medical assessment.
 - Ability to have participants or staff have a direct line to gather information through appropriate portals, the lack of direct connection to local advocate is a challenge. Connection with ADRC and lack of local advocacy through SSA office is missing.
 - WRI
 - It is an important part of formal and informal assessment process. Some may be eligible for SSI and SSDI, what do we need to do to verify and document, look to connect participant to appropriate resources to apply, and discuss a plan if not approved.
 - Had staff strong and good basis of SSA programs and advocacy. With turnover shorter on these staff. Utilizing resource centers. Participants have already established a relationship with an attorney for the most part.

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- Barriers – Issues with providing own requests satisfied with formal assessments, physical health providers are slow in responding to requests or not doing it at all, becoming more of an issue especially during COVID-19 pandemic, length of time for application process and sometimes takes years.
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8. AGENCY UPDATES

Owner: W-2 Agencies
Time Allotted: 30 minutes

Details: updates

Discussion:

- FSC
 - Human Resources department is doing a complete re-analysis of recruitment to hiring. Trying to optimize the process to receive the right resumes for position postings.
 - Is information on the Request for Proposal (RFP) coming out this year for W-2?
 - Linda Richardson stated there is a once-a-year extension that they plan on issuing and will work on RFP this Summer which will take a while to complete.
 - UMOS
 - Traction on open positions had good candidates interviewed and have open positions still for hire.
 - Will be attending a community resource fair for Kenosha and Racine to promote positions available across UMOS and specifically in Milwaukee.
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9. CLOSING

Owner: Mac Strawder
Time Allotted: 5 minutes

Details: Walk-ons and/or discussion if needed.

Discussion:

- Please submit agenda items to Mac Strawder.
 - Please include Topic, Presenter, and Duration for planning purposes.
 - Please provide Mac with presentation documents prior to the meeting.
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Next Meeting:

Wednesday, April 27, 2022
10:30AM-12:00PM
Microsoft Teams