

From: DCF BWF Work Programs Help Desk <BWFWorkProgramsHD@wisconsin.gov>
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To: DCF DL DFES BWF W-2 Agency CARES Coordinators <DCFDLW-2AgencyCARESCoordinators@wisconsin.gov>; DCF DL DFES BWF W-2 Agency Directors <DCFDLDFESBFW2AgencyDirectors@wisconsin.gov>; DCF DL DFES BWF W-2 Agency Policy Coordinators <DCFDLDFESBFW2AgencyPolicyCoordinators@wisconsin.gov>
Cc: DCF DL DFES BWF W-2 REGIONAL STAFF <DCFDLDFESBFW-2REGIONALSTAFF@wisconsin.gov>
Subject: Reminders and Guidance on the Use of Telephonic Signatures
Importance: High

In response to COVID-19, DCF suspended the requirement for in-person meetings and written signatures and issued guidance on the use of telephonic signature. Since this adjustment, DCF has received several questions regarding applicant and participant telephonic signatures. To clarify policy requirements, here are a few reminders:

1. When collecting a telephonic signature, please use the guidance below regarding CCA. DCF created fillable forms with a space for CCA ID numbers for this reason.
2. When collecting an electronic signature, agencies may use DocuSign or another signature software that does not alter the content of the form. See guidance below.
3. Currently in CWW, a telephonic signature on the application summary page is only acceptable for a CMF/CMU placement (see error message below). Until this is able to be updated in CWW, agencies are permitted to choose “written” for the W-2 signature field so they can move past this page and continue the workflow. Agencies should be noting the telephonic signature generated through CCA and their use of this system workaround in case comments.

The screenshot shows a web form titled "Generate Summary" with a "Cancel" button and a "Reset" button. A red error banner at the top states: "The following events have occurred: GL 366: Interview type must be selected as CMF/CMU Phone Review when W-2 Signature is telephonic." Below the error, the form displays summary information for an effective date of 11/02/2020 for worker E DITSCHHEIT (XCT15T). The "W-2 Signature" field is set to "P - Telephonic". Other options include "View Summary" (E - English), "What would you like to do?" (MS - Mail Summary), and "Telephonic Signature ID" (132432156410). A note at the bottom indicates that the date of eligibility review will be recorded during the call. The form concludes with the heading "Signing Your Eligibility Review" and a statement: "I will now read a summary of the information you have provided and record your verbal signature. This is done to confirm what you said, and make

Policy Guidance on Telephonic Signatures:

W-2 agencies may conduct all appointments, typically held in-person, by telephone as necessary to reduce risk of COVID-19 exposure. W-2 agencies are to use the Contact Center Anywhere (CCA) software currently in use for CMF, CMF+, and CMU W-2 Eligibility Reviews to collect all required signatures from W-2 applicants and participants.

CWW will provide an option for collecting a telephonic signature for eligibility reviews for all placement types. It will not provide the option for collecting a telephonic signature for any other type of meeting, however. Therefore, for telephonic signatures for anything other than an eligibility review, FEPs will have to read whatever document is being telephonically signed, e.g., W-2 application, W-2 Participation Agreement, Employability Plan, etc., in order to record the agreement being made between the FEP and the participant, the FEP will need to read the language that is in the telephonic signature display in CCA. CCA will then provide the FEP with the interaction id number that the FEP should record in case comments.

BWF created three scripts agencies can use when utilizing CCA for telephonic signatures. The scripts are for Emergency Assistance and W-2 application signatures and W-2 requests for assistance.

Information on how to navigate the CCA software is available on the Partner Training Team (PTT) Learning Center in the [Contact Center Anywhere Reference Guide](#) for W-2 desk aid. Additional information on use of CCA can be found in Operations Memo [18-09: Telephonic Signatures for CMF, CMF+, and CMU W-2 Eligibility Reviews](#).

Please also reference this list of FAQs for further questions on the use of CCA and telephonic signatures:

Question	Answer
Previous questions reference the use of CCA, but is it alright to use DocuSign?	Yes, the use of DocuSign and other technology to obtain signatures and complete virtual appointments is acceptable.
Is use of CCA required at this time? Can it be used with a cell phone or alternate phone number application such as Google Voice? If it is possible to use on a cell phone, how can the authorized phone number be updated to use?	No, CCA is not required to be used at this time. Agencies are able to use DocuSign and other technology to obtain signatures and complete appointments virtually. Agency workers must use a phone number that is connected to their CCA accounts. If the worker's phone number has changed due to COVID-19, regardless of the new phone number type, the worker must update the phone number to connect with their CCA account. Instructions for updating the phone number can be found at https://dcf.wisconsin.gov/w2/partners/toolbox/helpdesk.
Can DCF provide a document	

<p>with the telephonic signature scripts for Request for Assistance, Completion of Eligibility, and Emergency Assistance for FEPs to use for consistency?</p>	<p>Yes, DCF provided telephonic signature scripts for RFA, Completion of Eligibility, and EA for FEPs to use for consistency. They were communicated via the BWF WP Help Desk on April 8, 2020.</p>
<p>When CCA is used for electronic signature there is no save document to put into ECF that it was signed. How should the agency handle this?</p>	<p>When an electronic signature is captured there is no requirement to send the documents to the participant for signature. To meet the ECF requirement, the agency can hand-write a note on the document to capture that it was signed telephonically along with the interaction ID and then scan the document into ECF. The W-2 agency should also mail applicant/participants copies of all documents that they signed telephonically for their reference.</p>

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