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**State of Wisconsin
 Governor Scott Walker**

**TO: W-2 Agencies
 Income Maintenance Supervisors
 Income Maintenance Lead Workers
 Income Maintenance Staff
 Workforce Development Boards
 Job Center Leads and Managers
 Training Staff
 Child Care Coordinators**

**FROM: Janice Peters, Director
 Bureau of Working Families
 Division of Family and Economic Security**

DFES OPERATIONS MEMO					
No: 12-62		Amended			
DATE: 12/10/2012					
FS	<input type="checkbox"/>	MA	<input type="checkbox"/>	BC+	<input type="checkbox"/>
SC	<input type="checkbox"/>	CTS	<input type="checkbox"/>	FSET	<input type="checkbox"/>
CC	<input type="checkbox"/>	W-2	<input checked="" type="checkbox"/>	EA	<input type="checkbox"/>
CF	<input type="checkbox"/>	JAL	<input checked="" type="checkbox"/>	JC	<input type="checkbox"/>
RCA	<input type="checkbox"/>	RMA	<input type="checkbox"/>	Other	<input type="checkbox"/> *
				EP	
PRIORITY: HIGH					

SUBJECT: Job Access Loan (JAL), Wisconsin Works (W-2) Auxiliary Payment and Performance Outcome Payment (POP) Claim Approvals

EFFECTIVE DATE: January 1, 2013

PURPOSE

The purpose of this memo is to:

1. Inform Wisconsin Works (W-2) agencies of the Client Assistance for Re-employment and Economic Security (CARES) updates surrounding Job Access Loan (JAL) and W-2 auxiliary payment approval and pending payment listing screens; and
2. Introduce the W-2 Performance Outcome Payment (POP) claim approval process and related new CARES screens.

BACKGROUND

Under the 2013 W-2 and Related Programs Contract, the Bureau of Working Families (BWF) has developed a new service delivery structure. The state is divided into 10 geographical areas. There are four (4) W-2 geographical areas in Milwaukee County served by four (4) Milwaukee W-2 agencies. (See W-2 Milwaukee Geographical Areas Map). There are six (6) W-2 geographical areas in the Balance of State (BOS) served by four (4) BOS W-2 agencies. (See BOS Geographical Areas Map) One (1) of the BOS W-2 agencies serves three (3) different geographical areas.

➤ **Note:** For the purposes of this memo, “W-2 geographical area(s)” includes all of the geographical areas that a W-2 agency is contracted to serve. This is particularly important because one BOS W-2 agency is contracted to serve multiple geographical areas.

CURRENT APPROVER PROCESS

Currently in CARES, a W-2 agency assigns JAL and W-2 auxiliary payment claim approvers on the JAL Authorized Approvers screen (BIJA) and the W-2 Auxiliary Authorized Approvers screen (BIAW) using W-2 Eligibility office numbers or W-2 Work Program (WP) office numbers.

UPDATED APPROVER PROCESS

Effective January 1, 2013, a W-2 agency assigns JAL approvers on BIJA and W-2 auxiliary payment claim approvers on BIAW using W-2 Work Program (WP) office numbers only. This is also true for the new W-2 Performance Outcome Approvers (WPOA) screen.

BWF designed the new WPOA approver screen and updated the BIJA and BIAW approver screens so that W-2 agencies may designate approvers for particular W-2 WP offices. Approvers then have the ability to approve payments or POP claims initiated from any W-2 WP office within their W-2 geographical area(s).

W-2 agencies may elect to identify different approvers for each of the two (2) payment types and the POP claim or they may elect to identify approvers who can approve all three (3). However, a W-2 agency must identify at least one (1) approver for each of the three (3) approval functions in each geographical area the agency serves.

The W-2 agency may designate between zero (0) and 14 approvers per W-2 WP office for POP claims and between zero (0) and 10 approvers for JAL and W-2 auxiliary payments. It is not necessary to have an approver listed under every W-2 WP office within the geographical area(s) because every approver, regardless of the assigned W-2 WP office, can approve payments or claims that are initiated from any W-2 WP office within the W-2 geographical area(s).

Approvers are currently associated with W-2 eligibility office numbers and W-2 WP office numbers. On January 1, 2013, a data fix will run in CARES to remove the approvers set up for the W-2 eligibility offices.

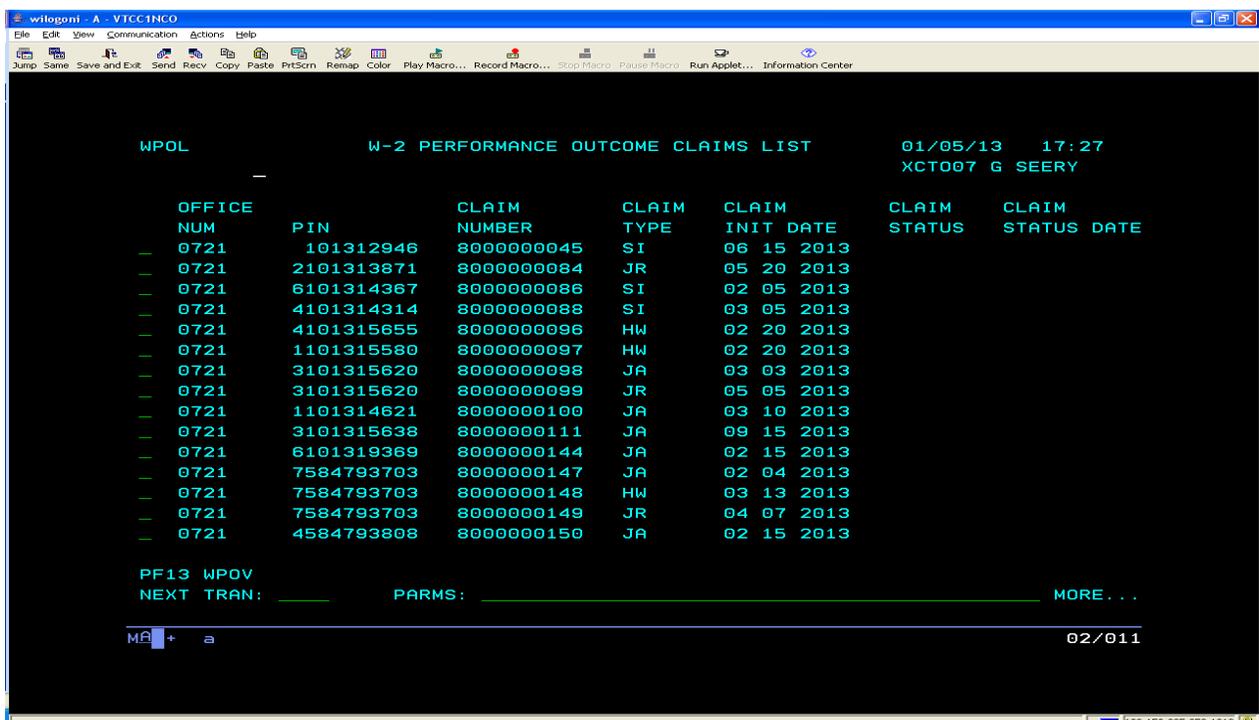
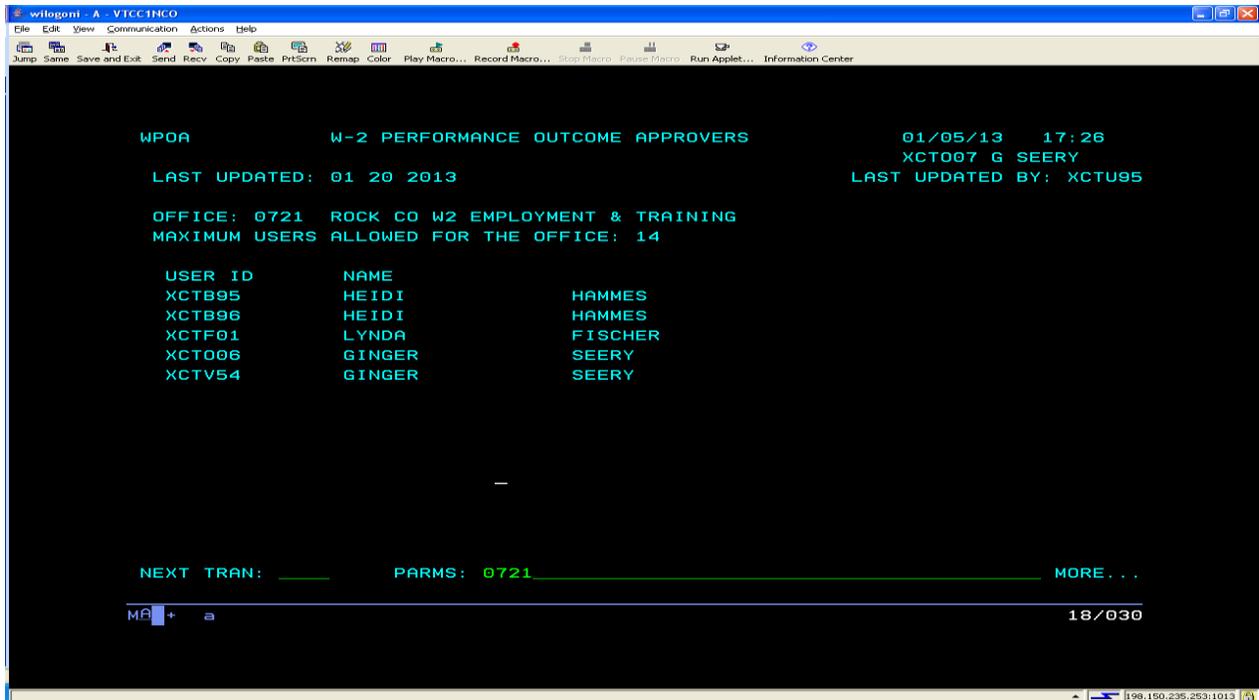
Because BWF enters the approver's Logon ID for JAL and W-2 Auxiliary payments, and POP claims for all W-2 agencies, the Bureau of Regional Operations (BRO) and the Milwaukee Operations Section (MOS) sent a spreadsheet via e-mail to all of the W-2 agencies requesting Logon IDs for all three (3) types of approvers. W-2 agencies were to complete this spreadsheet and e-mail it to BRO/MOS by December 3, 2012. W-2 agencies must request changes to approvers by completing [Form DCF-F-2582-E](#). BWF updated this form to include W-2 POP claim approvers. The title changed to *Job Access Loan, W-2 Auxiliary Payment and/or Performance Outcome Payment Claim Approval Designation*.

CARES

NEW AND UPDATED CARES APPROVER SCREENS

New W-2 Performance Outcome Approvers Screen

Effective January 1, 2013, BWF will add two new screens to the CARES mainframe. CARES screen WPOA records approver information for POP claims. CARES screen WPOL lists all pending POP claims. (See **Viewing Pending Payments and Claims**)



Updated CARES Approver and Pending Approval Screens

BWF has made the following changes to screens BIJA, BIAW, JAL Request Approval (BIAJ) and W-2 Auxiliary Request Approval (BIWA) screens to improve the approval process.

JAL Authorized Approvers

Current BIJA	New BIJA
Only a worker who is assigned to a W-2 WP office on BIJA may approve a JAL payment on BIAJ for that office.	An approver who is assigned to a W-2 WP office within a W-2 geographical area(s) can approve a JAL payment that is initiated from any W-2 WP office within the W-2 geographical area(s).

JAL Request Approval

Current BIAJ	New BIAJ
Displays the pending JAL payments for the W-2 WP office of the assigned approver.	An approver can go to this screen with the W-2 WP office number and the screen will display all pending JAL payments for the W-2 geographical area(s).

W-2 Auxiliary Authorized Approvers

Current BIAW	New BIAW
Only a worker who is assigned to a W-2 WP office on BIAW may approve an auxiliary payment on BIWA for that office.	An approver who is assigned to a W-2 WP office within a W-2 geographical area(s) can approve an auxiliary payment that is initiated from any W-2 WP office within the W-2 geographical area(s).

W-2 Auxiliary Request Approval

Current BIWA	New BIWA
Displays the pending W-2 auxiliary payment for the W-2 WP office of the assigned approver.	An approver can go to this screen with the W-2 WP office number and the screen will display all pending auxiliary payments for the W-2 geographical area(s).

VIEWING PENDING PAYMENT AND CLAIM APPROVALS

The approval screens for POP claims, JALs, and W-2 auxiliary payments display all pending claims for the W-2 geographical area(s) (instead of individual W-2 WP offices).

POP Claims

If a worker goes to the W-2 Performance Outcome Claims List (WPOL) screen with a W-2 WP office number in the PARM field, all initiated POP claims (along with the last seven (7) days of approved, withdrawn and denied claims) are displayed for the entire W-2 geographical area(s). This data is available for any worker associated with the W-2 geographical area(s).

JAL and W-2 Auxiliary Payments

If an approver goes to screens BIAJ or BIWA with a W-2 WP office number in the PARM field, all pending claims are displayed for the entire W-2 geographical area(s).

➤ **Note:** JAL and W-2 auxiliary workers who are not approvers will not be able to view payments.

CHANGES TO ALERTS

Beginning January 1, 2013, CARES will generate alerts for pending JAL and W-2 auxiliary payments and POP claims based on the same criteria. This is different from the way CARES generated alerts for JALs and W-2 auxiliary payments prior to January 1.

JAL and W-2 Auxiliary Alerts Prior to January 1, 2013	JAL, W-2 Auxiliary, and POP Claim Alerts Beginning January 1, 2013
CARES sent alerts for JAL and W-2 auxiliary payments to approvers assigned to the W-2 Eligibility office or W-2 WP office where the payment or claim was initiated.	CARES sends alerts for all payments and claims to all of the approvers designated for the W-2 geographical area(s).

When a JAL or W-2 Auxiliary payment or a POP claim is ready for review for approval, CARES sends an alert to all approvers within the W-2 geographical area(s). If an approver initiates a payment or claim, that approver cannot approve that payment or claim. The only action the initiator can take is to withdraw the payment or claim.

When the approver approves a payment or claim, CARES deletes the alert associated with that payment or claim from the other approvers' task list. When a JAL or W-2 auxiliary approver denies a payment, CARES sends an alert to the person who initiated the payment.

If CARES withdraws a payment or claim through a batch process, CARES sends the person initiating the payment or claim an alert.

CONTACTS

For Policy Questions in the Balance of State: Bureau of Regional Operations, W-2 Regional Coordinators

For Policy Questions in Milwaukee: Milwaukee Operations Section Regional Administrators

For CARES Processing Questions: W-2 Help Desk

*Program Categories – FS – FoodShare, MA – Medicaid, BC+ – BadgerCare Plus, SC – Senior Care, CTS – Caretaker Supplement, CC – Child Care, W-2 – Wisconsin Works, FSET – FoodShare Employment and Training, CF – Children First, EA – Emergency Assistance, JAL – Job Access Loan, JC - Job Center Programs, RCA – Refugee Cash Assistance Program, RMA - Refugee Medical Assistance Program, *Other EP – Other Employment Programs.

DCF/DFES/BWF/AW