DEPARTMENT OF
CHILDREN AND FAMILIES
Secretary Eloise Anderson
201 East Washington Avenue, Room G200
P.O. Box 8916
Madison, WI 53708-8916
Telephone: 608-266-8684
Fax: 608-261-6972
www.dcf.wisconsin.gov

State of Wisconsin
Governor Scott Walker

DEPARTMENT OF HEALTH SERVICES
Secretary Dennis Smith
1 West Wilson Street
P.O. Box 7850
Madison, WI 53707-7850
Telephone: (608) 266-9622
FAX: (608) 266-7882
www.dhs.wisconsin.gov

DFES OPERATIONS MEMO

No: **12-67**

DATE: **12/03/12**

FS	☐	**MA**	☐	**BC+**	☐
SC	☐	**CTS**	☐	**FSET**	☐
CC	☐	**W-2**	☒	**EA**	☐
CF	☐	**JAL**	☐	**JC**	☐
RCA	☐	**RMA**	☐	**Other EP**	☐*

PRIORITY: HIGH

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

SUBJECT: Wisconsin Works (W-2) Team Management Tool & W-2 Teams in Client Scheduling

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CROSS REFERENCE: Process Help #, 73
Operations Memo 12-57

EFFECTIVE DATE: December 8, 2012

PURPOSE

The purpose of this memo is to announce enhancements to the Team Management and Client Scheduling tools in CARES Worker Web (CWW).

- The Team and Caseload Management enhancements allow W-2 supervisors and workers to support the creation and management of teams relevant to the W-2 program and the new W-2 Geographical Areas.
- The Client Scheduling enhancement allows appointment scheduling based on W-2 teams.

BACKGROUND

Under the 2013 W-2 and Related Program Contracts, the Bureau of Working Families (BWF) has developed a new service delivery structure. The state is divided into 10 geographical areas. Four (4) geographical areas are in Milwaukee County, and six (6) geographical areas are in the Balance of State (BOS). Starting January 1, 2013, eight (8) contractors will administer the W-2 program across the 10 W-2 geographical areas.

Milwaukee W-2 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).

Milwaukee W-2 Agency	Milwaukee W-2 Geographical Area
Ross Innovative Employment Solutions	Northern
America Works of Wisconsin, Inc.	East Central
UMOS, Inc.	Southern
MAXIMUS Human Services, Inc.	West Central

In Milwaukee, the W-2 geographical area for an individual is based on the individual’s household address. Each of the four (4) Milwaukee geographical areas has a corresponding W-2 eligibility office. W-2 agencies must assign W-2 cases in Milwaukee to the W-2 eligibility office serving the participant’s address.

Balance of State W-2 Geographical Areas

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) BOS W-2 agency services three (3) different geographical areas.

BOS W-2 Agency	BOS W-2 Geographical Area
ResCare Workforce Services	Southeast
Forward Service Corporation	Southwest
Workforce Connections, Inc.	Western
Workforce Resource, Inc.	Northwest
Forward Service Corporation	North Central
Forward Service Corporation	Northeast

In BOS, the W-2 geographical area for an individual is based on the individual’s county of residence. BOS geographical areas consist of multiple counties. Each county is assigned one W-2 eligibility office number. Therefore, BOS W-2 agencies must manage cases in and across multiple eligibility offices. W-2 agencies must assign W-2 cases in the BOS to the W-2 eligibility office serving the participant’s county of residence.

Originally, the Department of Health Services (DHS) designed CWW team and caseload management tools with the following functionalities to support the Income Maintenance (IM) Consortia:

- Team creation based on county/tribe or IM Consortium;
- Caseload management allowing workers to search for cases by county/tribe, caseload number(s), or IM Consortium and IM worker ID(s); and
- Client scheduling allowing workers to set-up walk-in appointments, search for available interview slots, or search for scheduled interviews.

To support the new service delivery structure, BWF has enhanced CWW to provide W-2 agencies the ability to monitor and manage workloads within and across geographical areas based on the “team” approach.

POLICY

There are no policy changes associated with this CWW enhancement.

CARES WORKER WEB

TEAM AND CASELOAD MANAGEMENT ENHANCEMENTS

To manage and monitor workloads across a W-2 geographical area, BWF has enhanced the Team Management tool in CWW to allow W-2 agencies to create and manage teams within and across W-2 geographical areas.

Effective December 8, 2012, only workers with W-2 worker profiles can create, modify, or delete a W-2 geographical area team. Only workers with IM worker profiles can create, modify, or delete a team using the county or IM consortia options.

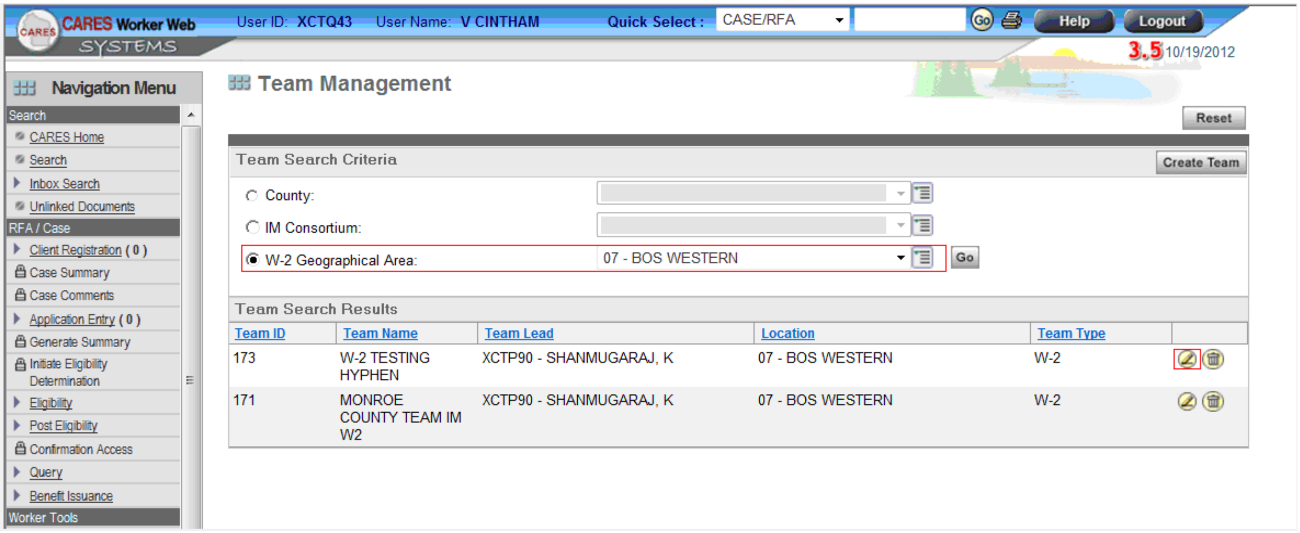
- CWW will allow W-2 geographical area based teams within BOS to be composed only of workers who have update access to at least one office associated with that particular W-2 geographical area; and
- CWW will allow W-2 geographical area based teams within Milwaukee to be composed only of workers who have update access to the W-2 eligibility office associated with that particular Milwaukee W-2 geographical area.

Additionally, the Caseload Management Page will be enhanced to allow case searches by Financial and Employment Planner (FEP) ID and within a W-2 geographical area.

BWF has modified the following pages in Cares Worker Web (CWW):

Team Management Page

W-2 agencies begin the process of creating and editing teams on the Team Management page. Workers access this page via the Navigation Menu in CWW under Worker Tools.



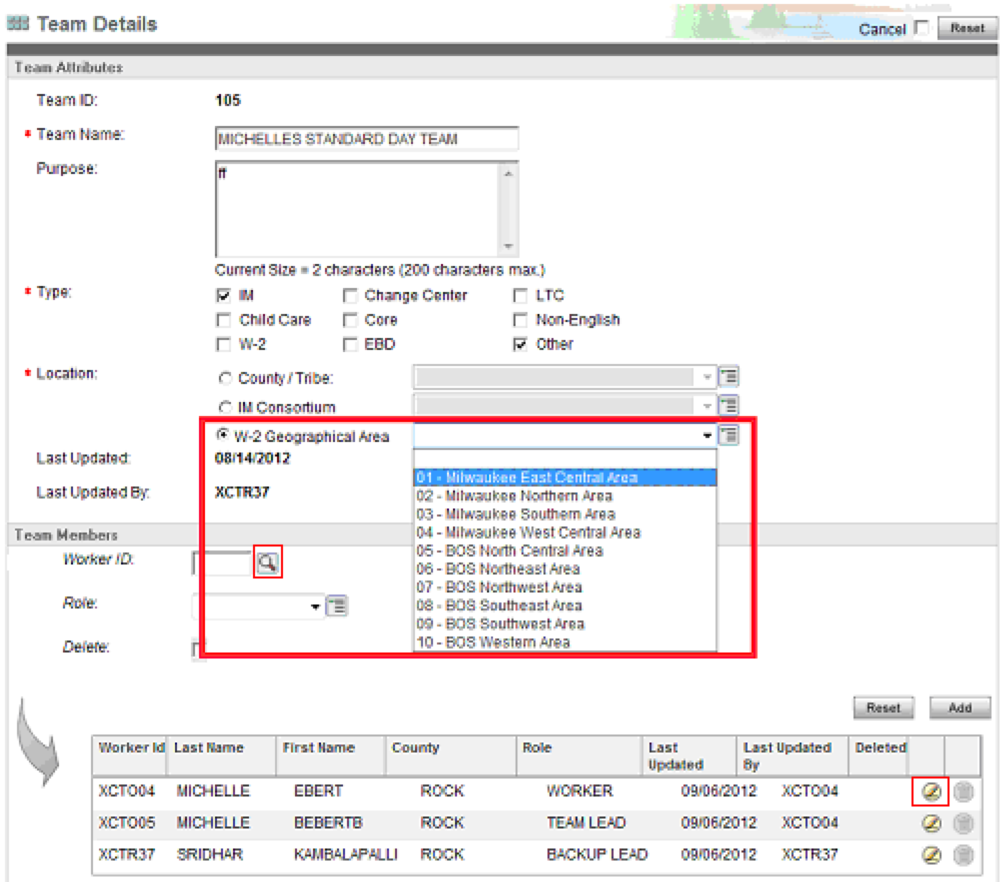
W-2 supervisors and workers with a CARES security level of 50 or higher can create a team at the W-2 geographical area level by clicking the “Create Team” button. Workers are then brought to the Team Details page where they can create the new team.

To view or edit existing teams, select the “W-2 Geographical Area” radio button option and then click on the “Go” button. By default, the county(ies) associated with the logged-on worker’s ID will be pre-selected in the County/Tribe field on the Team Search Criteria page.

To edit a specific team, click the pencil icon next to “Team Type” in the Team Search Results section. This will take you to the Team Details page, where you can edit the team.

Team Details Page

W-2 Supervisors and workers with a security level of 50 or higher can use the Team Details page to create or edit an existing team.



The Team Name, Type and Location fields are required. Team names are limited to 40 characters and cannot be used more than once within the same W-2 geographical area. The worker may use the “Purpose” box to describe the team.

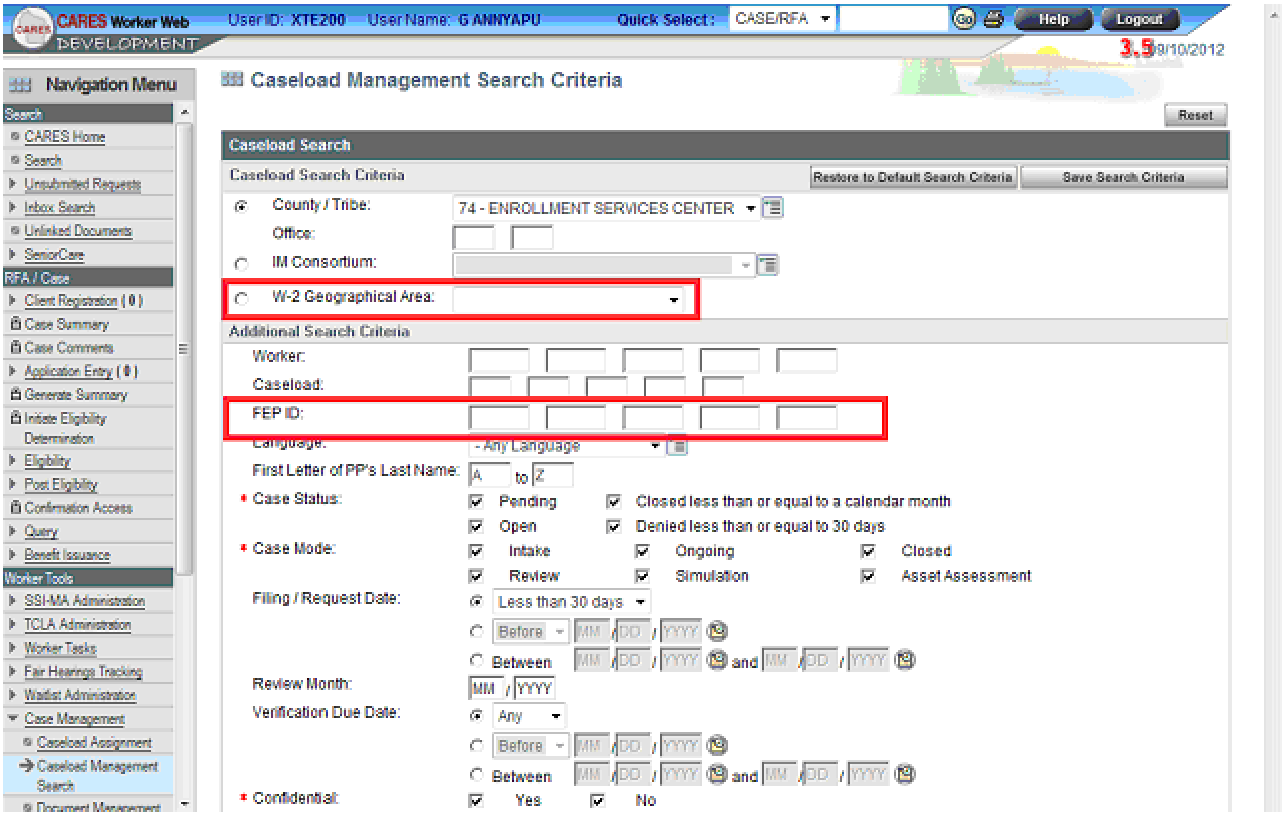
Team members are added by worker ID. Each member is then assigned a role (worker, team lead or backup lead). Team members must belong to the same W-2 geographical area. There can be only one lead, but teams may have multiple backups and workers.

To look up a worker’s ID, the worker clicks on the magnifying glass next to worker ID in the Team Members section, which will then take the worker to the Office Worker Find page.

Caseload Management Search Criteria Page

BWF added the following two search options to the Caseload Management Search Criteria page for W-2 workers:

1. The ability to search by W-2 geographical area in the Caseload Search Criteria section of the page; and
2. The ability to search by FEP ID in the Additional Search Criteria section. Up to five (5) FEP IDs may be included in the search.

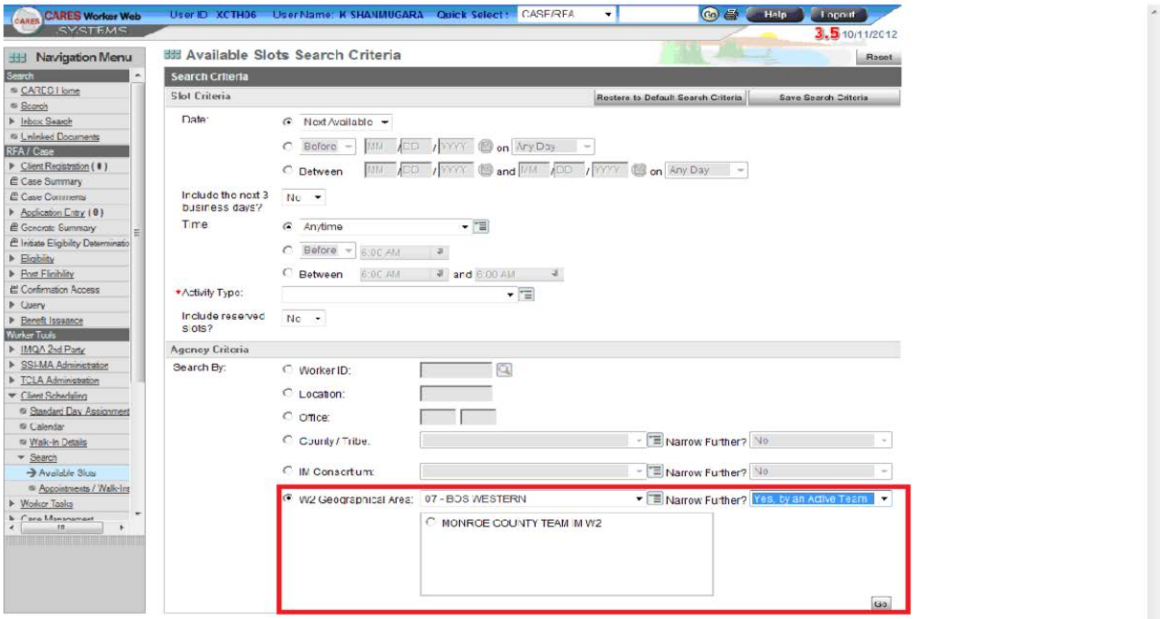


NOTE: W-2 geographical areas will not have the W-2 Team Dashboard available with this enhancement. The W-2 Team Dashboard will be available in a future enhancement. Please see Process Help Chapter 73 for more detailed information on using the Team Management function in CWW.

CLIENT SCHEDULING ENHANCEMENT

By creating W-2 geographical teams, W-2 agencies have greater flexibility when using Client Scheduling to:

- Schedule W-2 interviews/appointments;
- Search for open interview/appointment slots; or
- Search for scheduled interviews/appointments.



BWF has added a W-2 Geographical Area radio button to the Available Slots Criteria Search Page. This functionality offers greater flexibility and increased ability to accommodate an applicant's or participant's schedule by searching multiple team members' calendars at one time for available slots.

See Operations Memo 12-57 for complete instructions for using Client Scheduling.

TRAINING

More information on the Team Management Tool and Client Scheduling is available in Process Help 73.

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/JK