**State of Wisconsin
Governor Scott Walker**

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

FROM: Shawn Smith, Director
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Division of Family and Economic Security

BEPS/DFES OPERATIONS MEMO		
No: 12-70 (Amended)		
Date: 12/17/12		
FS ☒	**MA** ☒	**BC+** ☒
SC ☐	**CTS** ☒	**FSET** ☐
BC+ Basic ☐	**BC+ CORE** ☒	
CC ☒	**W-2** ☒	**EA** ☐
CF ☐	**JAL** ☐	**JC** ☐
RAP ☐	**WIA** ☐	**Other** ☐*
		EP

SUBJECT: CARES Security Changes for Requests for Assistance (RFA) and Case Processing

CROSS REFERENCE: Operations Memo 12-50

EFFECTIVE DATE: January 1, 2013

PURPOSE

The purpose of this memo is to announce CARES Worker Web (CWW) security profile changes to support Wisconsin Works (W-2) and Income Maintenance (IM) Requests for Assistance (RFA) and case processing.

Security changes do not affect the Wisconsin Shares Child Care program. Both IM and W-2 workers can still access Child Care specific pages, although Child Care eligibility determination and confirmation remains the responsibility of County Human/Social Service agencies.

BACKGROUND

Under the 2013 W-2 and Related Programs Contract, the Bureau of Working Families (BWF) has developed a new service delivery structure dividing the state 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 serves 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.

To support the new W-2 service delivery structure described above, BWF along with the Department of Health Services (DHS) changed the CWW security structure to prohibit workers from accessing or updating select CWW pages and functionalities for programs that are not their responsibility.

CARES/CWW

<u>CURRENT FUNCTIONALITY</u>

Currently, IM and W-2 workers have security profiles that allow them to enter and process program requests for any program supported in CARES/CWW. Additionally, workers are able to confirm eligibility for programs that are not their responsibility.

<u>UPDATED FUNCTIONALITY</u>

<u>Updated IM and W-2 Security Profiles</u>

As of January 1, 2013, IM and W-2 workers will have new security profiles that allow them to enter RFAs and process cases, including confirming eligibility.

State staff are creating and assigning new security profiles to support the specific roles and responsibilities of W-2 and IM workers by restricting access to only the programs and functions that are their responsibility. There are now three (3) types of worker security profiles:
1. W-2 only;
2. IM only; or
3. Mixed W-2 and IM (applicable for Receptionist profiles only) (See **RFA Processing** below)

Based on the worker's security profile, certain CWW and CARES mainframe access will: 1) be restricted completely; 2) have restricted fields or functionality on the page; or 3) have no security restrictions.

<u>Restricted CWW Pages</u>

The IM only security profile allows IM workers access to the CWW pages listed below. The W-2 only profile allows W-2 workers read-only access to these pages.

- FoodShare Priority Service Determination
- FoodShare Hardship Reasons
- MAPP
- Other HealthCare Programs Gatepost
- Family Care
- Community Waivers
- Institutions
- Community Spouse
- BC+ Core Plan Potential Eligibility
- BC+ Core Plan for Childless Adults
- BadgerCare Plus Deductible Request for Children
- BadgerCare Plus Transitional Grandfathering

<u>CWW and CARES Field Level and Functionality Restrictions</u>

In addition to restricting access to some CWW pages and CARES mainframe screens by creating new security profiles, the state is also restricting access to fields or functionality on

specific CWW pages and CARES screens based on worker security profile. Some workers retain full access to all fields and functionalities. The following chart lists the CWW pages and CARES screens and the restrictions.

CWW Pages and CARES Screens	W-2 Worker Access	IM Worker Access
W-2 Request	No Security Restrictions	Begin Month and W-2 Request date fields
W-2 Up-front Activities	No Security Restrictions	Begin Month field
Health Care Request	Begin Month and Program Filing date fields	No Security Restrictions
Caretaker Supplement (CTS) Request	Begin Month and Program Filing date fields	No Security Restrictions
Family Planning Waiver (FPW) Request	Begin Month and Program Filing date fields	No Security Restrictions
FoodShare Request	Begin Month and Program Filing date fields	No Security Restrictions
View SMRFs	CC radio button option	No Security Restrictions
Request for Assistance (RFA) Program Requests	W-2 and CC fields	All fields except W-2
Group Level Program Request	W-2 and CC fields	All fields except W-2
Merge Program Request with Case	W-2 and CC fields	All fields except W-2
General Case Information	CWW will reschedule page if W-2 Geographical Area is 'Not Found'. Override required.	CWW will not reschedule page. Override option always disabled
Address Verification	CWW will reschedule General Case Information page if W-2 Geographical Area is 'Not Found'	CWW will not reschedule General Case Information page
Application/Interview Details	'Interview Type' dropdown enabled for W-2 and CC programs	'Interview Type' dropdown enabled for all programs except W-2
Verification Due Date	W-2 and CC fields	All fields except W-2

CWW Pages and CARES Screens	W-2 Worker Access	IM Worker Access
Team Management	Can delete W-2 geographical area teams only	Can delete IM consortia teams only
Team Details	Can create or edit W-2 geographical teams only	Can create or edit IM consortia teams only
Walk In Details	W-2 geographical area teams only visible in 'Team' dropdown	IM consortia teams only visible in 'Team' dropdown
Client Registration Driver Flow	IM only RFA is read-only	W-2 only RFA is read-only
Confirmation Mainframe Screen	Can confirm W-2 and CC programs	Can confirm all programs except W-2

> **Note:** W-2 workers must not create CC RFA's or populate CC only fields. CC eligibility remains the responsibility of county human/social service agencies.

W-2 Case Review/Renewal Processing Change

A review for W-2 is no longer considered an IM program renewal. W-2 workers must not use the 'Process Renewal' radio button on the Case Summary page when initiating a W-2 review. This radio button has been renamed "Process IM or CC Renewal." This radio button is used to process IM renewals or Child Care reviews only and not W-2 reviews.
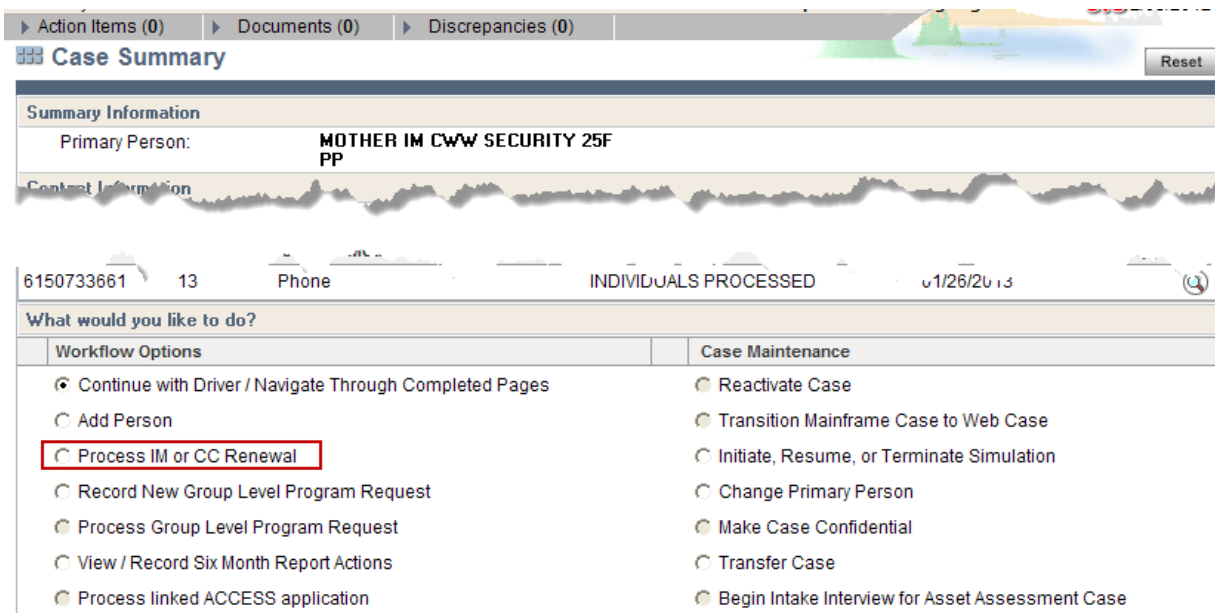
If a W-2 worker mistakenly clicks the "Process IM or CC Renewal" radio button, the case will be in 'Review' mode. When the IM worker then confirms the Health Care benefits on CARES screen AGEC, CARES updates the Health Care renewal date, which is incorrect. If this occurs,

the W-2 worker must contact the IM agency so the IM worker can correct the Health Care renewal date after W-2 confirmation.

When completing a W-2 eligibility review in CWW, the W-2 worker must follow the instructions provided in the *W-2 Eligibility Review in CARES CWW Desk Aid* available in the DCF Learning Lab. Important reminders include:

♦   W-2 workers must use the Navigation Menu to select CWW pages during an eligibility review. W-2 workers must not click the "Next" button on the CWW *General Case Information* page unless he or she is in the Person Add driver flow. W-2 workers must not use the "Process IM or CC Renewal" radio button on the *Case Summary* page when initiating a W-2 review.

♦   W-2 workers and IM workers must document in case comments information that has changed. Most CWW pages have a button near the bottom of the page that allows workers to quickly add any case comments they need during a review rather than waiting until the end of the review.

It is preferable for W-2 workers to complete eligibility reviews prior to Adverse Action[1] (AA) in the month that the review is due. CWW will not have closed the case and processing the review is simpler. For reviews run after AA, the W-2 workers must re-request W-2, run eligibility with dates, and complete overrides to re-establish W-2 eligibility.

Instructions for Confirming Eligibility for Any Program

Currently, the IM agencies and the W-2 agencies are experiencing "unending looping" with regard to confirmation. This is due to the second worker re-running eligibility unnecessarily.

If there is a change to the case information on an IM/W-2 case and the first worker confirms eligibility, the second worker must then also confirm eligibility, preferably the same day. To complete the application or review process, the second worker must complete confirmation **without re-running eligibility**. If the second worker re-runs eligibility prior to confirmation, then the first worker will have to confirm the case again as well, creating the potential looping. That is why it is important for the second worker to only re-run eligibility when necessary.

It is only necessary for the second worker to re-run eligibility if:

• the worker made additional changes to the case (e.g. verification, etc),
• a batch process was completed since the first worker confirmed eligibility, or
• it is after Adverse Action..

Otherwise, the second worker must not re-run eligibility. If the second worker must re-run eligibility due to one of the reasons listed above, the first worker must again confirm the previously confirmed programs.

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[1] Adverse Action is the last day of the month a change can be made in CARES to affect eligibility for the following month. Adverse Action is usually 13 calendar days prior to the last day of the month. W-2 workers can find Adverse Action dates on Table TBIC in CWW or on the CARES Batch Schedule (three-letter code is ACT).

As a best practice, workers should go to CARES screen AGEC to see if they are able to confirm their programs without re-running eligibility. If they are, they should review the program budgets by clicking on the Budget tab under the Eligibility tab in the Navigation Menu prior to confirming the benefit. The worker must also review case comments prior to confirmation in order to understand what, if any, information has changed.

If workers are not able to confirm a program because a case is pending verification, they will need to re-run eligibility once they receive verification. This means both the IM and the W-2 workers will have to confirm their programs again to take the case out of Intake or Review mode. As long as one program is pending and not confirmed, the case will remain in Intake or Review mode. The case will not move to Ongoing mode until ALL programs are confirmed.

In order to ensure that workers are not delaying eligibility confirmation for any program, they must communicate with each other by:

1. Contacting each other, i.e., phone, e-mail, face-to-face, to inform the other worker of the need to confirm; and
2. Clearly documenting in case comments the information that changed in CWW and the page where the information is located.

Checking Alerts

As a part of their case management responsibility, W-2 workers must check their alerts daily and take appropriate action, particularly for Alert 074: *Confirm AGEC if correct*. To generate a listing of all of a W-2 workers alerts, the W-2 worker enters CMWA in the 'NEXT TRAN' field.

To search by a specific alert, the W-2 worker enters CMCR in the 'NEXT TRAN' field. On the CARES 'Customized Alert Request' mainframe screen, the W-2 worker enters his or her user ID and the alert code for which he or she is searching. Supervisors may also use this functionality to search for workers' alerts.

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CMCR                        CUSTOMIZED ALERT REQUEST            03/12/13 09:39
                                                                XCTV53 G SEERY

 SPECIFY IF YOU WANT THE ALERT DISPLAY TO BE LIMITED BASED ON THE FOLLOWING:

   USERID:  xctv53                   (May specify user other than sign-on user)

   ALERT CODE:    074 ___ ___        (May specify up to 3 codes)
   DATE DUE:      __ __ ____  THRU __ __ ____
   DATE RECEIVED: __ __ ____  THRU __ __ ____
   PRIORITY:      _ _ _              (May specify up to 3 priorities)
   SENDER ID:     _____             (Only specify for alert code 999

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 SPECIFY IF YOU WANT THE ALERT DISPLAY TO BE IN A DIFFERENT ORDER (up to 2)

   NUMBER (PIN/Case)  _
   DATE DUE           _
   DATE RECEIVED      _
   PRIORITY           _

 NEXT TRAN: ____    PARMS: _____
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RFA Processing

As describe above, creating an RFA is now limited to the program type for which the worker is responsible. W-2 workers must only create requests for W-2; and IM workers can only create requests for IM programs and Child Care. When an applicant is requesting both   W-2 and IM programs, workers must create two (2) separate RFA's - one for IM and one for W-2.

A receptionist may be assigned any of the three (3) security profiles types described above. (See **Updated IM and W-2 Security Profiles**) A receptionist using a mixed profile type must also create two (2) separate RFAs for applicants applying for both W-2 and IM programs.

IM and Work Program Eligibility Office Access Changes

In BOS, IM and W-2 workers will now have access to both the 50 IM eligibility offices and the 55 W-2 eligibility offices in their respective W-2 geographical areas and IM consortia. In Milwaukee, IM and W-2 workers will have access to IM eligibility office 5075 and the four (4) new 56XX W-2 eligibility offices.

W-2 workers have access to IM eligibility offices that correspond with the W-2 eligibility offices to which they are assigned. For example, in Rock County, Forward Service Corporation W-2 workers have access to the 5553 W-2 eligibility office and to the corresponding 5053 IM eligibility office.

Milwaukee CARES User ID's

State staff are assigning W-2 workers in Milwaukee new CARES User ID's that are specific to their agency. DHS Security staff will e-mail each W-2 agency's security officer the new CARES User ID's for existing workers by December 17, 2012. January 2, 2013 is the first day these workers can use their new User ID's.

On January 2, 2013, DHS Security staff will provide temporary passwords for the new User ID's. Security staff will provide this information to each Milwaukee W-2 agency's security officer. Agency security officers must then provide the temporary password to staff. Upon first login, CARES will prompt workers to update their password.

State staff will also update the W-2 WP Default Case Managers, Transfer Coordinators, and the primary administrator.

TRAINING

Training material is available in the Learning Center, "Request For Assistance (RFA)/Case Processes for W-2 Desk Aid". More information on the security profile changes and CWW page updates is in Process Help 2.5.1.1.

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

BEPS CARES Information & Problem Resolution Center

*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, BC+ Core – BadgerCare Plus Core, CF – Children First, EA – Emergency Assistance, JAL – Job Access Loan, JC - Job Center Programs, RAP – Refugee Assistance Program, WIA – Workforce Investment Act, Other EP – Other Employment Programs.

DCF/DFES/BWF/JK