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**State of Wisconsin  
Governor Scott Walker**

**TO: Income Maintenance Supervisors  
Income Maintenance Lead Workers  
Income Maintenance Staff  
W-2 Agencies  
Training Staff  
Child Care Coordinators**

**FROM:** Shawn Smith, Bureau Director  
Bureau of Enrollment Policy & Systems  
Division of Health Care Access and Accountability

Janice Peters, Director  
Bureau of Working Families  
Division of Family and Economic Security  
Department of Children and Families

<b>BEPS/DFES OPERATIONS MEMO</b>					
<b>No: 13-08</b>					
<b>DATE: 04/09/2013</b>					
<b>FS</b>	<input checked="" type="checkbox"/>	<b>MA</b>	<input checked="" type="checkbox"/>	<b>BC+</b>	<input checked="" type="checkbox"/>
<b>SC</b>	<input type="checkbox"/>	<b>CTS</b>	<input checked="" type="checkbox"/>	<b>FSET</b>	<input type="checkbox"/>
<b>BC+ Basic</b>	<input type="checkbox"/>	<b>BC+ CORE</b>	<input checked="" type="checkbox"/>		
<b>CC</b>	<input checked="" type="checkbox"/>	<b>W-2</b>	<input checked="" type="checkbox"/>	<b>EA</b>	<input type="checkbox"/>
<b>CF</b>	<input type="checkbox"/>	<b>JAL</b>	<input checked="" type="checkbox"/>	<b>RAP</b>	<input type="checkbox"/>
<b>Other</b>				<input type="checkbox"/>	*
					<b>EP</b>

**SUBJECT: State Online Query Internet Process (SOLQ-I) and Automatic Update of Social Security Information in CWW**

**CROSS REFERENCE:** Operations Memos 02-70, 04-51, [11-42](#), and [12-51](#)  
CARES Guide Chapter 10

**EFFECTIVE DATE:** April 29, 2013

**PURPOSE:**

The purpose of this memo is to announce the implementation of a CARES Worker Web (CWW) automatic, real time update of information received through the State Online Query Internet (SOLQ-I) process with the Social Security Administration (SSA). The update will occur at application, renewal, person add, program add and Six Month Reporting (SMRF). The information that will be updated includes Social Security Number (SSN) verification, Social Security Income (SS), Supplemental Security Income (SSI) and Medicare information. The goal of automatically updating SSA information in CWW is to improve program integrity as well as reduce the workload associated with manually collecting and updating the information.

**BACKGROUND:**

The Department of Health Services (DHS) received a grant to automate specific processes in CWW, to improve program integrity and reduce workload. Under the first project in September 2011, the department, in coordination with the Department of Children and Families, implemented the first project, the automatic update of Unemployment Insurance income (Operations Memo [11-42](#)).

The current project is the automatic update of information from the SSA. Workers currently obtain SSA information by querying the data exchanges available through CARES Mainframe functions SOLQ, DXSA, and DXSX. At application, workers manually enter the SSA information in CWW. A semi-monthly automatic update of SS income and a weekly update of SSI income and eligibility are done for most open; ongoing cases. If the individual is newly eligible for a benefit through SSA, there may be a delay in updating the information. This can cause errors in benefit determination. Real time automatic updating of this information in CWW will reduce the case processing time for workers and improve payment accuracy.

Currently, CARES uses a daily WTPY process to verify the applicant's SSN, citizenship and identity but the process does not notify workers when the SSN cannot be verified through SSA. The real time automated process will set a discrepancy to alert the worker when SSA cannot verify an SSN.

The weekly SSI Auto Update process and the semi monthly Social Security Update processes will continue in addition to the real time automatic update.

➤ **NOTE:** Citizenship/Identity verification currently completed through a batch process with SSA is not included in this first phase of the SOLQ-I. The departments will add this function as a second phase to the SOLQ-I process. Until then, CARES continues the citizenship and identity verification through the current batch process.

**NEW CARES/CWW PROCESS:**ONLINE

CARES initiates the SOLQ-I web service from the CWW *General Case Information* page during intake, renewal\*, person add, program add, and SMRF. CARES initiates the SOLQ-I web service for SMRF processing when the worker marks the SMRF complete (CMP) in CWW for FS and/or Child Care (CC).

The web service sends the request for SSN, SS and SSI income, Medicare, and the prisoner match (for individuals who are between 18 years and 65 years) information for all individuals included in eligibility determinations who have a valid SSN (verification code "V", "C", or "W") on the CWW *Household Members* page. If the SSN is verified and SS income, SSI income, or Medicare exists, CARES updates any of the pages listed below that contain related information before the worker gets to the page in the driver flow (unless there is a discrepancy). Because prisoner match data is not available in real time, CARES updates discrepancies from the prisoner match in CWW process approximately 3 to 5 days after CARES sends the request.

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\*In [Operations Memo 12-70](#), the Bureau of Working Families issued instructions to FEPs on manually completing W-2 reviews. Under those instructions, FEPs must manually conduct reviews and cannot initiate the review driver flow in CWW. This means that CARES will not run data exchanges during W-2 reviews. The bureau hopes to have the W-2 review process automated by Fall 2013.

This will reduce the number of monthly prisoner discrepancies created (Operations Memo [12-51](#)). CARES also calls the web service when the worker clicks on the magnifying glass icon on the Discrepancy Panel or through a query from the CWW *Data Exchange Query* page.

➤ **NOTE:** When workers change the demographics (SSN, first or last name or date of birth) on the *Household Members* page, the *General Case Information* page will be scheduled to initiate SOLQ-I web service request for SSN verification.

This new process automatically updates the following CWW pages:

1. *Household Members*
2. *Benefits Received*
3. *Permanent Demographics*
4. *Unearned Income Gatepost*
5. *Unearned Income*
6. *Medicare Gatepost*
7. *Medicare*

When there are no discrepancies, CARES will update all of the above pages if information exists (i.e. if there is no Social Security income received, the *Unearned Income Gatepost* and the *Unearned Income* pages will not be updated). Of the pages listed above, when discrepancies are set CARES will update either some of the pages or none at all. (See page 8 for more information on discrepancies)

➤ **NOTE:** CARES does not automatically update the *Disability* page, so it is extremely important that workers continue updating the information on that page when an individual is determined disabled by the SSA.

Begin months updated through SOLQ-I follows the same logic as the UI updates. During intake, CARES auto updates the page using the filing date as the effective begin month. If there is a backdate request, CARES uses the first month of the backdate period as the effective begin month, if there is existing SS, SSI, or Medicare information for that month.

During renewal, SMRF, person add and program add driver flows, CARES updates the CWW pages with the current information and the current month as the effective begin month.

➤ **NOTE:** If workers are doing a person add with a BCP/Medicaid backdate request, CARES updates the income from the current month. The worker will have to query the income and manually update any income for the backdated month manually.

CARES no longer drops the DX verification codes out at review.

### HOUSEHOLD MEMBERS PAGE

CARES updates the SSN verification code if an SSN is verified through SOLQ-I. CARES displays a discrepancy, if the SSN cannot be verified (See page 9 for more information on discrepancies).

BENEFITS RECEIVED PAGE

SOLQ-I updates the SSDI Payment, SSI Payment, SSI Letter and SSI 1619B fields if the individual is receiving any of these benefits. At this time, CARES displays a message notifying the worker that SOLQ-I was either successful or unavailable.

The screenshot displays the 'Benefits Received' page in the CARES Worker Web. At the top, the user ID is XCTN49 and the case status is Pending. The left navigation menu includes options like 'Benefits Received' and 'School Enrollment'. The main content area shows two benefit entries. The first entry, 'Benefits Received [1 of 2]', is highlighted in green. It shows an effective period starting in 10/2011 and lists several benefits: 'SSDI Payments' (Yes), 'SSI Letter' (Yes), 'Foster Care/Subsidized Guardianship' (No), and 'QDWI Referral' (No). The 'SSDI Payments' and 'SSI Letter' fields are highlighted in green and have verification codes of 'DX - SYSTEM GENERATED UPDATE'. A green arrow points to a message box above the first entry that reads '0X002: SSN verified, auto-update created'. The second entry, 'Benefits Received [2 of 2]', shows 'Kinship Care' (No), 'Kinship Care Court Order?' (No), 'TANF Services' (Yes), 'SSI 1619(b)' (Yes), and 'Outpatient Drug / Alcohol Treatment' (No). At the bottom, there is a section for 'Individual' information and a note: 'Based on client's response, populate blank fields as N'.

PERMANENT DEMOGRAPHICS PAGE

CARES updates the date of death field, if the person is deceased.

### UNEARNED INCOME GATEPOST PAGE

If anyone is receiving SS or SSI, CARES populates these fields with a Y in the appropriate question on the *Gatepost* page.

### UNEARNED INCOME PAGE

CARES updates all SS and SSI income types, if the person is receiving a payment. It also updates all income to a monthly amount and default to “available”. The process continues to update the claim number for SS income. CARES **will not** update the State SSI income. A discrepancy will display, if the person is receiving a State SSI payment. The worker must verify and enter the State SSI payment manually. Workers must continue to enter the SSI-E expenses as “verified” to disregard the income for FS. The SSA/COLA default amount carries forward what was previously updated on the page. Workers will navigate to SS/SSI information from the *Unearned Income* page by clicking on the magnifying glass icon.

### MEDICAL GATEPOST

CARES updates the Medicare question with a “Y” for anyone entitled to Medicare.

### MEDICARE

CARES updates this page with the Medicare information for any individuals entitled to Medicare.

### DISCREPANCIES

As with the UI auto update process, the SOLQ-I process uses the discrepancy functionality to alert the worker when SSN verification and/or SS or SSI income information is either not updated completely or at all. SOLQ-I discrepancies occur during the online process only.

- **NOTE:** Workers must update the information necessary to complete case processing before running eligibility and confirming the benefit determination.

Once a discrepancy is set, workers can view it from the case summary page or from any page within the case. The discrepancy displays in the information bar at the top of the page (next to Action Items and Documents). CARES does not recreate the same discrepancy if the discrepancy already exists. **If possible, workers should resolve discrepancies before running eligibility.** CARES assigns the discrepancy to the primary worker for a case. Workers must be aware of discrepancies while processing a case and take corrective action on the case before running eligibility or confirming benefits. Once the primary worker has taken the appropriate corrective action to resolve the discrepancy, the primary worker must update the status of the discrepancy by choosing one of the options listed below:

- Resolved;
- Duplicate ;
- Withdrawn; or
- No impact;

While secondary workers must not update discrepancy statuses, they must follow up on discrepancies as well. The secondary worker must then use case comments to record the status updates. In cases with both primary and secondary workers, case comments are essential in order to track actions on the case. Secondary workers only receive alerts for discrepancies through the overnight batch process.

➤ **NOTE:** The number of outstanding discrepancies on the primary worker’s home page may not be the same as the count from searching for a list of discrepancies. This is because discrepancies are dynamic and CARES can create them at any point while a worker is updating a case.

The screenshot shows the CARES Worker Web interface. At the top, the user is logged in as 'User ID: [redacted] User Name: [redacted]'. The 'Quick Select' dropdown is set to 'CASE/RFA'. The case details are: Primary Person: 31M PP, Case: [redacted], Status: Pending, Mode: Intake. The date is 10/20/2011. A navigation menu on the left lists various options like 'Client Registration', 'Case Summary', 'Case Comments', and 'Application Entry'. The main content area shows a list of discrepancies for 10/19/2011:

- SSN ver not found/last name mismatch ( 4M SON) - SOLQI Query
- SSN ver not found/last name mismatch ( 31M PP) - SOLQI Query
- New DOB from SSA check DX and update ( 31M PP) - SOLQI Query

Below the discrepancies, the case information is displayed:

- Office: MILW CO REG & W-2 GOODWILL EMPLOY SOLUTN (5605)
- Meets ESC Criteria?: No
- County / Tribe:
- IM Consortium:
- Assigned Worker:
- File Location: IN - INTAKE
- Caseload: 3445
- File Location Date: 10/19/2011

The 'Case Information' section includes:

- Language: E - ENGLISH
- Last Review Date:
- Next Review Date:
- Case Closed Date:
- Case Web Status: WEB

The 'Associated RFA Information / ACCESS Application Information' table shows:

Number	Agency	Contact Method	RFA Status	Contact Date	ACCESS App
7001268071	40	Walk-in	INDIVIDUALS PROCESSED	10/19/2011	

At the bottom, there are sections for 'What would you like to do?' with 'Workflow Options' and 'Case Maintenance' lists, and a date input field for 'Enter Begin Month for New Data: MM / YYYY'.

The screenshot displays the CARES Worker Web interface. At the top, the user is logged in as 'User ID: [redacted] User Name: [redacted]'. The 'Quick Select' dropdown is set to 'CASE/RFA'. The case status is 'Pending' and the mode is 'Intake'. The date is 01/16/2013. The main content area shows the 'Unearned Income Gatepost' section with a green header: 'The following events have occurred: AE 446: Review Data Exchange discrepancy above and update case.' Below this, the 'Effective Period' is '01/16/2013'. The 'Unearned Income' section asks 'Does anyone in your household receive income from any of these sources?'. A list of income sources is shown, with 'SS - Social Security' highlighted in green and marked 'Y - Yes'. Other sources include AA - Adoption Assistance, CH - Charitable Contributions, DI - Sick / Disability Benefits, FC - Foster Care, IN - Interest, MN - Maintenance / Alimony (N - No), NA - National Refugee Relief, PA - Assistance In Another State, PS - Payments From Property Sold, RR - Railroad Retirement, UN - Unemployment Insurance, WC - Workers Compensation, and TT - Tribal TANF. A callout box points to the 'Discrepancies (1)' link in the top navigation bar.

To get a list of outstanding discrepancies and work from the Search Results list to resolve discrepancies, workers click on the magnifying glass icon from My Tasks. When workers select the case, they are taken to the *Case Summary* page to resolve any discrepancies for that case. The worker navigates back to the Search Results list by clicking on the “Return to Search Results” tab within the case.

Workers can also get a list of outstanding discrepancies by searching for outstanding discrepancies from the *Caseload Management Search Criteria* page. Workers and supervisors can use this function to query outstanding SSA discrepancies by using county/tribe, IM Consortium, office, worker or caseload number.

Using the case number, the primary or secondary worker can view the discrepancies for that case, make the appropriate updates to resolve the discrepancy, and update the status (primary worker), or document the status in case comments (secondary worker). The worker can then return to the Search Results.

CARES Worker Web SYSTEMS User ID: XCTN97 User Name: K REPALLE Quick Select: CASE/RFA Help Logout 3.5 10/20/2011

**Navigation Menu**

- Search
  - CARES Home
  - Search
  - Inbox Search
  - Unlinked Documents
- RFA / Case
  - Client Registration (0)
  - Case Summary
  - Case Comments
  - Application Entry (0)
  - Generate Summary
  - Instate Eligibility Determination
  - Eligibility
  - Post Eligibility
  - Confirmation Access
  - Query
  - Benefit Issuance
- Worker Tools
  - SSI/MA Administration
  - TCLA Administration
  - Worker Tasks
  - Case Management
    - Case/Case Assignment
    - Case/Case Management Search
  - Document Management Search
  - Client Correspondence
  - Data Exchange
  - Reference Tools

**Caseload Management Search Criteria**

**Caseload Search** Reset

**Caseload Search Criteria** Restore to Default Search Criteria Save Search Criteria

County / Tribe: [Dropdown]  
Office: [Text]  
IM Consortium: [Dropdown]

**Additional Search Criteria**

Worker: [Text]  
Caseload: [Text]  
Language: [Dropdown: - Any Language]  
First Letter of PP's Last Name: [Dropdown: A to Z]

**Case Status:**  
 Pending   
 Open   
 Intake   
 Review

**Case Mode:**  
 Pending   
 Open   
 Intake   
 Review

Filing / Request Date:  
 Less than 30 days  
 Before [MM/DD/YYYY] and [MM/DD/YYYY]  
 Between [MM/DD/YYYY] and [MM/DD/YYYY]

Review Month:  
 Any  
 Before [MM/DD/YYYY] and [MM/DD/YYYY]  
 Between [MM/DD/YYYY] and [MM/DD/YYYY]

Verification Due Date:  
 Any  
 Before [MM/DD/YYYY] and [MM/DD/YYYY]  
 Between [MM/DD/YYYY] and [MM/DD/YYYY]

**Confidential:**  
 Yes  No

Full Fee Paid Date:  
 Less than 30 days  
 Before [MM/DD/YYYY] and [MM/DD/YYYY]  
 Between [MM/DD/YYYY] and [MM/DD/YYYY]

**Action Items**

Online Submissions	Alerts / Discrepancies
<input type="checkbox"/> Application Linked - Ready for Intake	<input type="checkbox"/> Overdue Eligibility Determination
<input type="checkbox"/> Intake Initiated - Eligibility not Initiated	<input type="checkbox"/> Eligibility
<input type="checkbox"/> Change Report/Online Renewal/SMRF Received - Ready for Processing	<input type="checkbox"/> Benefit Issuance
<input type="checkbox"/> Change Report/Online Renewal/SMRF Processing Initiated - Eligibility not Initiated	<input type="checkbox"/> Information
	<input type="checkbox"/> Waiting on DDB Decision
	<input type="checkbox"/> Outstanding Verifications Past Due
	<input type="checkbox"/> Outstanding Verifications Approaching
	<input type="checkbox"/> Documents Received
	<input type="checkbox"/> Documents Waiting
	<input type="checkbox"/> Initiate Eligibility and Confirm
	<input type="checkbox"/> BCLA Fee Status Update
	<input type="checkbox"/> UI Benefit Discrepancy
	<input checked="" type="checkbox"/> SOLQ-I Discrepancy

What would you like to do?  
 View to select cases meeting the above criteria  
 View counts of cases meeting the above criteria

Go

Staff can search for SOLQ-I (and other discrepancies) by the county/tribe or Consortium.

CARES Worker Web User ID: [redacted] User Name: [redacted] Quick Select: CASE/RFA Go Help Logout 3.5 10/20/2011

**Navigation Menu**

- Search
  - CARES Home
  - Search
  - Inbox Search
  - Unlinked Documents
- RFA / Case
  - Client Registration ( 0 )
  - Case Summary
  - Case Comments
  - Application Entry ( 0 )
  - Generate Summary
  - Initiate Eligibility Determination
  - Eligibility
  - Post Eligibility
  - Confirmation Access
  - Query
  - Benefit Issuance
- Worker Tools
  - SSI-MA Administration
  - TCLA Administration
  - Worker Tasks
  - Case Management
  - Client Correspondence
  - Data Exchange
  - Reference Tools
  - System Tools
  - Agency Administration
  - Fiscal Services
  - HMO Search
  - Check My Benefit Worker

**Caseload Management Search Criteria Result**

**Caseload Search Criteria**

IM Consortium: [dropdown] Counties / Tribes: [dropdown]

Office: [dropdown]

Worker: [dropdown]

Language: **Any Language** [dropdown]

Case Status: **Pending, Closed less than or equal to a calendar month, Open, Denied less than or equal to 30 days**

Review Month: [dropdown]

Confidential: **Yes, No**

Verification Due Date: **Any**

Caseload: [dropdown]

First Letter of PP's Last Name: **A to Z**

Case Mode: **Intake, Ongoing, Closed, Review, Simulation, Asset Assessment**

Filing / Request Date: **Less than 30 days**

Full Fee Paid Date: **Not Paid / Not Applicable**

**Caseload Management Listing**

Case Number	County/Tribe	Primary Person	Case Status	Filing/Request Date	Action Items
<input type="radio"/>			Open	09/29/2011	<ul style="list-style-type: none"> <li>Information</li> <li>SOLQ-I Discrepancy</li> <li>Overdue Eligibility Determination</li> </ul>
<input type="radio"/>			Pending	09/26/2011	<ul style="list-style-type: none"> <li>SOLQ-I Discrepancy</li> <li>Overdue Eligibility Determination</li> </ul>
<input type="radio"/>			Pending	10/03/2011	<ul style="list-style-type: none"> <li>SOLQ-I Discrepancy</li> </ul>
<input type="radio"/>			Pending	10/03/2011	<ul style="list-style-type: none"> <li>SOLQ-I Discrepancy</li> <li>Overdue Eligibility Determination</li> </ul>
<input type="radio"/>			Pending	10/07/2011	<ul style="list-style-type: none"> <li>Initiate Eligibility and Confirm</li> <li>SOLQ-I Discrepancy</li> </ul>
<input type="radio"/>			Pending	10/10/2011	<ul style="list-style-type: none"> <li>SOLQ-I Discrepancy</li> <li>Overdue Eligibility Determination</li> </ul>
<input type="radio"/>			Pending	10/11/2011	<ul style="list-style-type: none"> <li>SOLQ-I Discrepancy</li> <li>Overdue Eligibility Determination</li> </ul>
<input type="radio"/>			Pending	10/11/2011	<ul style="list-style-type: none"> <li>SOLQ-I Discrepancy</li> <li>Overdue Eligibility Determination</li> </ul>
<input type="radio"/>			Pending	10/11/2011	<ul style="list-style-type: none"> <li>Information</li> <li>SOLQ-I Discrepancy</li> <li>Overdue Eligibility Determination</li> </ul>
<input type="radio"/>			Pending	10/11/2011	<ul style="list-style-type: none"> <li>SOLQ-I Discrepancy</li> <li>Overdue Eligibility Determination</li> </ul>

SOLQ-I DISCREPANCIES

**SSN ver not found/last name mismatch:** SSA cannot verify an SSN because the last name doesn't match. Workers must follow up with the customer to resolve the discrepancy and obtain verification of the SSN. CARES will not automatically update any CWW pages when this discrepancy is set.

**New SSN provided check DX and update:** SSA verifies the SSN, but the SSN and/or date of birth (DOB) is off by one digit. Workers must check SOLQ-I to obtain the correct SSN and update the *Household Members* page with the correct information.

**New DOB from SSA check DX and update:** SSA found the person and returned an SSN verification, but the SSA date of birth does not match the date of birth in CARES. Workers must use SOLQ-I and other resources to determine the correct date of birth.

**Dual/Trip entitle update SS and Medicare:** The SOLQ-I process cannot update income for individuals with dual or triple claim numbers. Workers must check SOLQ-I with the individual's SSN and manually update the income on the *Unearned Income* pages.

**Federal SSI-update State SSI (SISS):** SOLQ-I can only update federal payment information. Workers must verify the State SSI payment and update the information manually on the *Unearned Income* page.

**Railroad Retirement update Medicare:** The SOLQ-I process cannot update income or Medicare as some or all benefits may be received through Railroad Retirement. Workers must verify income or Medicare and update the appropriate pages in CWW.

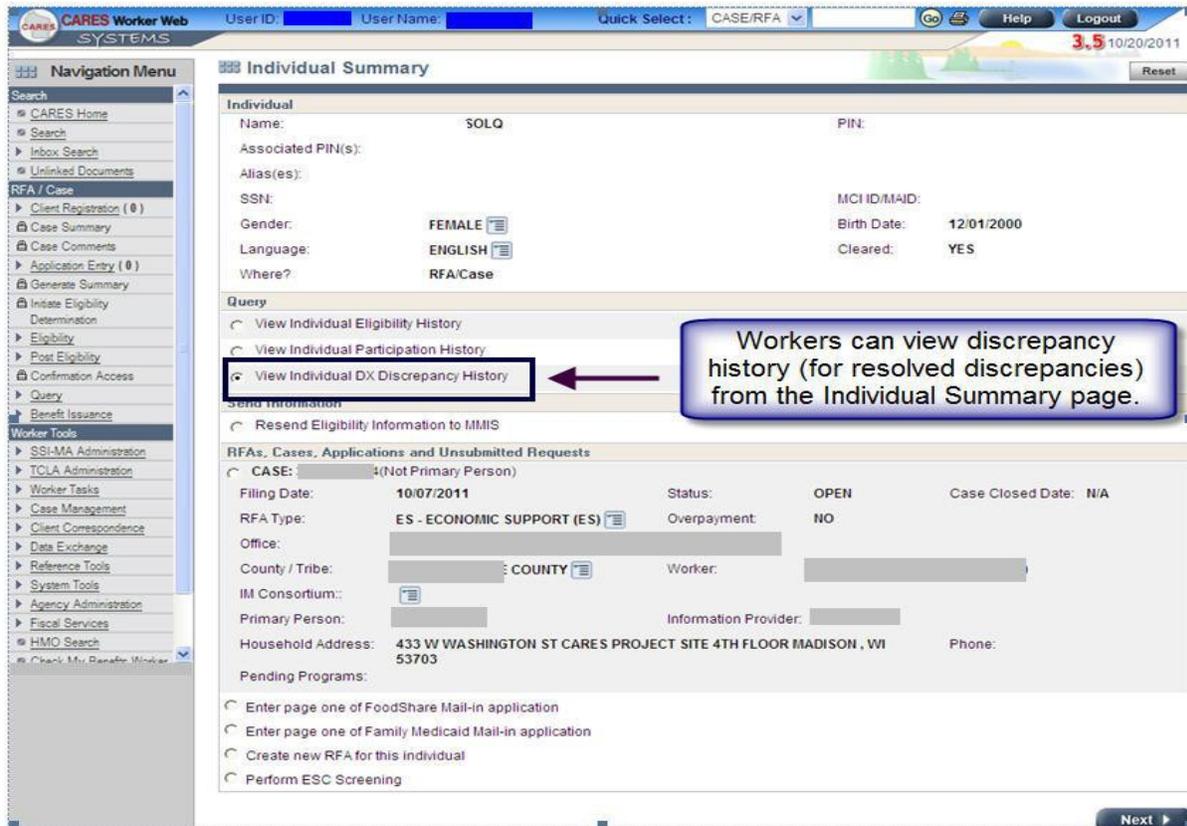
**Gross/net SS discrep enter OT income:** The auto-update process totals the net SS income, the amount of the Medicare premiums, and any SS recoupments to see if the total matches the gross SSA income amount on SOLQ-I. If the totals match, CARES updates the net income on the *Unearned Income* page and the Medicare information updated on the *Medicare* page. If the totals don't match (Medicare Part D premium taken out or SSA income is being garnished for child support, back taxes, etc.), CARES sets a discrepancy. This discrepancy is the same as Alert 369 that occurs during BENDEX batch processing. Currently, the SOLQ file does not contain details on these income deductions. Workers must contact SSA or the applicant/member to gather more information on the deduction.

In order for CARES to correctly budget the income, the worker must enter the amount that is being deducted on the *Unearned Income* page as "OT" income. The worker should document in case comments why the OT income is being entered. If the deduction is for an allowable expense for the program requested, the worker must enter the expense on the appropriate page in CWW (*Support Obligations/Payments* page, the *Medical Expense* page, or *Medical Coverage* page).

➤ **NOTE:** Discrepancies are only set once a day per individual and SOLQ-I data can only be stored in CARES for one day. If the worker corrects an SSN based on a discrepancy, s/he will not be able to re-verify the SSN through the SOLQ-I process that same day. This is because CARES will only display the information that SSA returned with the original process done that day. The WTPY process will continue to verify SSNs in the nightly batch process and CARES will display the information the following day.

DISCREPANCY HISTORY

Workers can access an individual’s discrepancy history for UIB, SOLQI, prisoners match, and SWICA () by clicking on the ‘View Individual DX Discrepancy History’ radio button on the *Individual Summary* page.



If there are resolved discrepancies present for an individual, CARES will display the discrepancy on the *Discrepancy History Results Page*.

The screenshot shows the 'Discrepancy History Results' page in the CARES Worker Web. The page header includes 'User ID', 'UserName', 'Quick Select: CASE/RFA', and a date '10/20/2011'. A navigation menu on the left lists various options like 'CARES Home', 'Search', 'Inbox Search', 'Unlinked Documents', 'RFA / Case', and 'Worker Tools'. The main content area displays a table of 'DX Discrepancies' with columns: Resolved, Case, Pin, Details, DX Type, Creation Date, Resolved By, and Resolved Date. A single row is shown with 'No impact' in the Resolved column, 'SSN ver not found/last name mismatch' in the Details column, and 'SLQ' in the DX Type column. Below the table is a filter bar with three highlighted sections: 2 (Source navigation icons), 1 (Discrepancy Type dropdown menu), and 3 (Resolved Date input field with a 'go' button). A 'Previous' button is also visible at the bottom right of the filter bar.

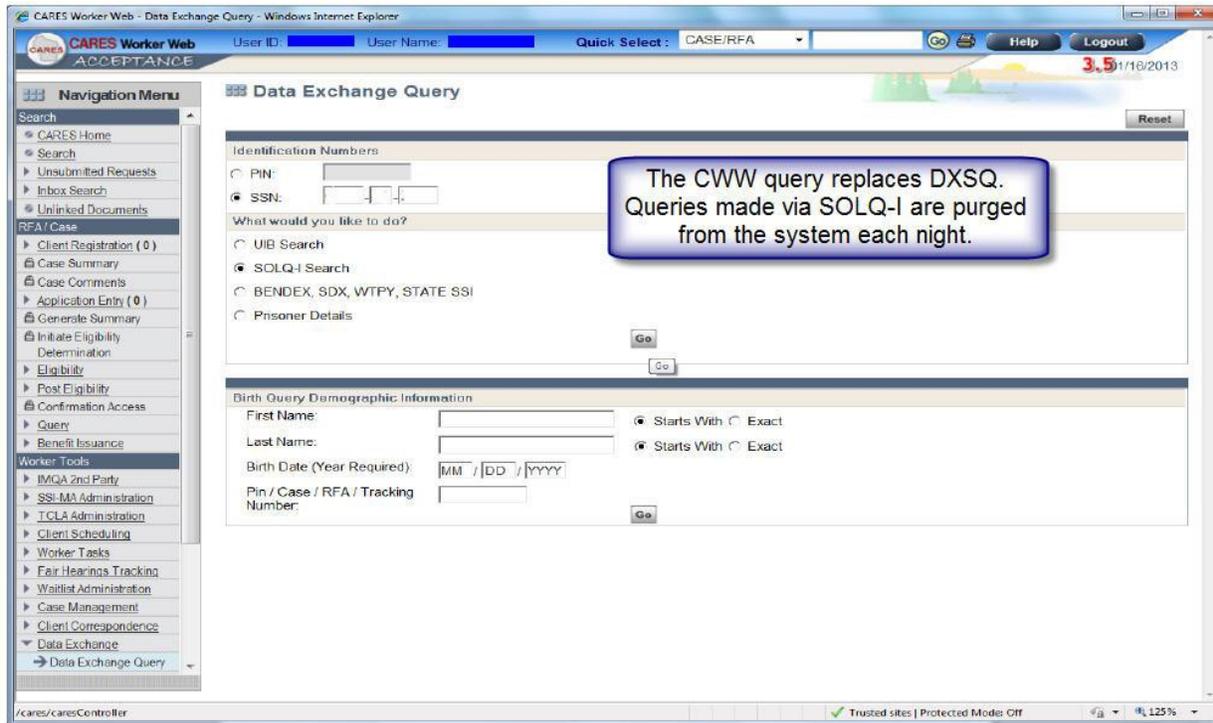
1. The worker can filter by discrepancy type or resolved date using the navigator buttons at the bottom of the page.
2. To navigate by Source, the worker can click on the icon on either the left or right, or select using the dropdown.
3. To navigate using resolved date, the worker can enter the date in the field provided and click "go."

### **DATA EXCHANGE QUERY:**

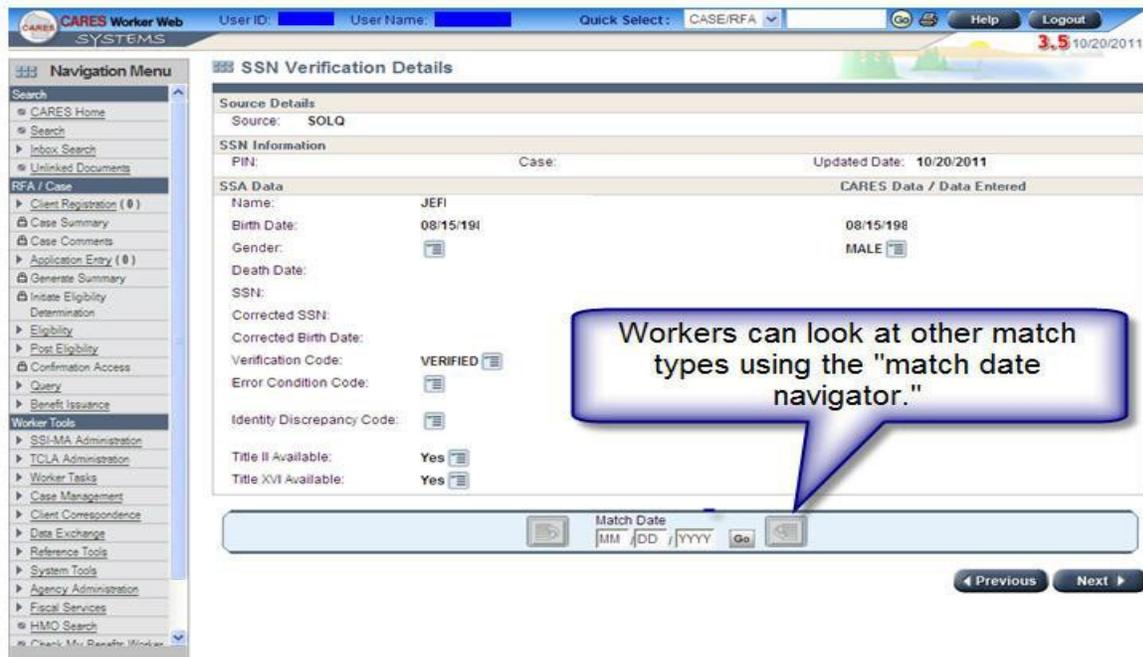
Workers must search for an individual's DX information, i.e., birth query, UI, SSN Verification, SS or SSI income, Medicare, and prisoner information on the *Data Exchange Query* page. Workers enter the SSN or PIN, select one of the three options under "What would you like to do?" and click 'go' to see the data requested on the appropriate details pages.

Workers can also access the appropriate details pages by clicking the magnifying glass icon on the *Unearned Income* page, or from the Information Bar at the top of the case when a discrepancy is set. The current SOLQ process in the mainframe (DXSQ) can be used for a short time, but will eventually be disabled. The DHS CARES Call Center will send out a message to agencies when the mainframe query is no longer available.

### DATA EXCHANGE QUERY PAGE



### SSN VERIFICATION DETAILS PAGE



SSA DETAILS PAGE

**CARES Worker Web SYSTEMS** User ID: [ ] User Name: [ ] Quick Select: CASE/RFA Help Logout 3.5 10/20/2011

**Navigation Menu**

- Search
- CARES Home
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  - Eligibility
  - Post Eligibility
  - Confirmation Access
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  - Fiscal Services
  - HMO Search
  - Check My Benefit Window

**SSA Details**

**SSA Details and Medicare**

Source Details  
Source: SOLQ

SSA Benefit Details

PIR:	SSN:	Case:
Client Name: JEFFREY	Updated Date: 10/20/2011	
Name Received: JEFFREY	Birth Date: 08/15/19	Gender: MALE
SSN Claim Number:	Death Date:	
Record Details:	Payment Status: T8	
Income Type: SOCIAL SECURITY SURVIVING CHILD	Current Entitlement Month: 11/1994	Benefit Payment Date:
Gross Benefit Amount: \$0.00	Net Benefit Amount: \$77.00	Suspension/Termination Date: 01/1997
Disability OnSet Date:	Dual Entitlement Claim:	Triple Entitlement Claim:
Cross Reference Claim:		
Over Payment Deduction Amount: \$0.00		
End Date:		
Direct Deposit Code: N		

**Medicare**

	PART-A	PART-B
Eligibility:	No	No
Entitlement Date:		
Termination Date:		
Premium:	\$0.00	\$0.00
Payor:		
3rd Party Begin Date:		
3rd Party End Date:		

**SSA Benefits**

SSA Payment Details

Disability Date:	Deferred Payment Date:
Initial Entitlement Month: 11/1994	Scheduled Payment Date:
Current Entitlement Month: 11/1994	
RailRoad Indicator:	

Gross Benefit Payment History

Date	Gross Amount
No data found.	

Match Date MM/DD/YYYY

Previous Next

SSI DATA EXCHANGE PAYMENTS DETAILS PAGE

**CARES Worker Web SYSTEMS** User ID: [ ] User Name: [ ] Quick Select: CASE/RFA Help Logout 3.5 10/20/2011

**Navigation Menu**

- Search
- CARES Home
- Inbox Search
- Unlinked Documents
- RFA / Case
  - Client Registration (0)
  - Case Summary
  - Case Comments
  - Application Entry (0)
  - Generate Summary
  - Initial Eligibility Determination
  - Eligibility
  - Post Eligibility
  - Confirmation Access
  - Query
  - Benefit Insurance
- Worker Tools
  - SSI-MA Administration
  - TOLA Administration
  - Worker Tasks
  - Case Management
  - Client Correspondence
  - Data Exchange
  - Reference Tools
  - System Tools
  - Agency Administration
  - Fiscal Services
  - HMO Search
  - Check My Benefit Window

**SSI Data Exchange Payment Details**

**SSI Details**

Source Details  
Source: SOLQ

Payee Demographic Details

PIR:	SSN:	Case Number:
Client Name: JEFFREY	Match Date: 10/20/2011	
Payee Name: JEFFREY	Birth Date: 08/15/19	Gender: MALE
Payee Type: DISABLED INDIVIDUAL	Citizen / Alien Code: PROVEN BORN IN U.S., U.S. CITIZEN	Date of Death:
Address:	Change Effective Date: 10/01/2011	

Payment Details

Details	Federal	State
Match Date:	10/20/2011	10/20/2011
Payment Status/Effective Date:	CURRENT PAY 05/2009	CURRENT PAY
SSI:	\$519.00	\$30.40
Recoupment:	\$0.00	\$0.00
SSI-E:		\$0.00
SSI-E/SE/CTS Recoupment:		\$0.00
Total Received:	\$519.00	\$0.00
Over/Under Payment Indicator:		

Other Details

State Grandfather Indicator:	Disability Determination: FINAL DETERMINATION-ALLOWANCE	Disability Date: 06/24/1985
Denial Determination:	Denial Date:	
Appeal Determination:	Appeal Date:	
Appeal Decision Determination:	Appeal Decision Date:	
MA Eligibility Code: ELIGIBLE FOR MEDICAID (1634 STATES ONLY).	Renal Patient:	
Eligibility Begin Date: 06/01/1985		
SSI Transaction Code:	SSI Application Date: 06/24/1985	FS Application Date:
Prior Initial Payment Amount: \$	Prior Initial Payment Date:	Direct Deposit: checking account

Federal SSI Payment History

History Details	Date	SSI Gross Amount	SSI Net Amount	SSI Recovery Amount	Payment Flag
	09/01/2009	\$519.00	\$0.00		RECURRING PAYMENT DATED THE FIRST OF THE MONTH
	08/07/2009	\$1,038.00	\$0.00		REGULAR DAILY PAYMENT (UNDERPAYMENT)

Unearned Income

History Details	Income Type	Start	Stop	Amount	Claim / ID Number
No data found.					

Earned Income

Details			
Wages:	\$395.00	Self Employment:	\$
Blind Work Expense Exclusion:	\$	Earned Income Exclusion:	\$

Match Date MM/DD/YYYY

Previous

State and vendor workers query SS/SSI data from the CWW *Non CWW SOLQ Search* page.

The screenshot shows the 'Non CWW SOLQ Search' page in the CARES Worker Web. The page has a navigation menu on the left with options like 'CARES Home', 'Worker Tools', 'Data Exchange', 'Non CARES SOLQ', and 'CARES Mainframe Access'. The main content area contains a search form with the following sections:

- Identification Numbers:** Radio buttons for 'SSN' and 'CAN-BIC' with corresponding input fields.
- Individual Demographics:**
  - First Name: [Text Field]
  - Middle Initial: [Text Field]
  - Last Name: [Text Field]
  - Gender: [Dropdown Menu] (MALE selected)
  - Date Of Birth: [Date Picker] (03 / 03 / 19)
  - Other Agency: [Dropdown Menu] (DWD - Department of V selected)
- What would you like to do?:** Radio buttons for 'SOLQ-I Search' and 'SOLQ-I Search'.

A 'Go' button is located at the bottom of the form. The browser window title is 'CARES Worker Web - Non CWW SOLQ Search - Windows Internet Explorer'.

## ALERTS:

### NEW ALERTS

- 472 - SSN/INCOME DISCREPANCY: CARES generates this alert when an SOLQ-I discrepancy for SSN or income verification (not related to Medicare) is set for the primary worker in the case. CARES sends the alert to the CC and W-2 worker if they are not the primary worker on the case.

➤ **NOTE:** This alert is not set in intake mode. If an SOLQ discrepancy is set during intake and is not resolved by the primary worker, the FEP and CC worker will see the discrepancy in the information bar. Workers processing the case must resolve all discrepancies prior to running eligibility and confirming. Alerts are not removed by CARES automatically. The FEP and CC worker should delete these alerts manually.

### EXISTING ALERTS (GENERATED ONLY THROUGH BATCH PROCESSING)

- 468 - 45 Day Alert to supervisor for overdue discrepancy
- 369 - SS INFO UPD AND DISCREP EXISTS
- 370 - FYI SS INCOME UPDATED
- 371 - NEW SS INCOME ADDED
- 372 - HOUSEHOLD MEMBER EXPIRED
- 373 - RECV BENEFITS IN OTHER STATE
- 381 - MEDICARE INFO END DATED
- 382 - SS INCOME END DATED
- 383 - FYI MEDICARE INFO UPDATED

**FUTURE:**

The departments are planning the following enhancements to the SOLQ-I Process. CARES will:

- Automatically update SSIE expenses disregarded in FoodShare eligibility determinations;
- For Medicaid, update Social Security for individuals with dual and triple entitlements;
- Add Citizenship/identity verification to the SOLQ-I process;
- Have SOLQ-I update the correct information in CARES (SSN or DOB) instead of setting a discrepancy when an '\*' or '3' SSN verification code is received from SSA; and
- Generate a message to review or update the *Disability* page when SSDI or Medicare information is found.

**CONTACTS:**

For IM related programs: BEPS CARES Information & Problem Resolution Center

For child care related policy questions from outside of Milwaukee County: County and tribal Child Care Coordinators should contact their Bureau Regional Operations (BRO) Child Care Coordinators at <http://dcf.wisconsin.gov/files/regionaloperations/pdf/contactlist.pdf>.

For child care related policy questions for Milwaukee County: Child Care Help Desk at: [childcare@wisconsin.gov](mailto:childcare@wisconsin.gov) or (608) 264-1657.

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

For W-2 Policy Questions in Milwaukee: Milwaukee Operations Section Regional Administrators

For W-2 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, 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.

DHS/DHCAA/BEPS/BWF