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State of Wisconsin
Governor Scott Walker



TO: **W-2 Agencies
Training Staff**

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

BWF OPERATIONS MEMO

No: 14-14

DATE: 07/03/2014

W-2	<input checked="" type="checkbox"/>	EA	<input type="checkbox"/>	CF	<input type="checkbox"/>
JAL	<input checked="" type="checkbox"/>	RAP	<input type="checkbox"/>	Other EP	<input type="checkbox"/> *

**SUBJECT: CWW Enhancements to Worker Alerts and Wisconsin Works
Program Request Functionality**

CROSS REFERENCE: [1.4.2.1](#) Wisconsin Works Manual
[13-09](#) Clarifying Instructions for Processing W-2 Case Closures,
Person Adds, and Person Deletes in CARES Worker Web
[12-70](#) CARES Security Changes for Requests for Assistance
(RFA) and Case Processing

EFFECTIVE DATE: June 28, 2014

PURPOSE

The purpose of this memo is to announce changes to the CARES Worker Web (CWW) worker alert functionality and the options for requesting Wisconsin Works (W-2).

BACKGROUND

In the past two years, the Bureau of Working Families (BWF) has made changes to CWW to support the W-2 program and improve W-2 worker efficiency while not adversely affecting other programs.

In an effort to continue to increase worker efficiency, BWF has made additional changes to the CWW worker alert functionality and the W-2 review driver flow. These changes only apply to the W-2 review driver flow and do not apply to the W-2 application and person add driver flows.

POLICY

There are no W-2 policy changes.

CARES WORKER WEB CHANGES

WORKER ALERTS

Current Functionality: Currently, CWW assigns alerts to a case and they appear in the Action Items panel located at the top of each CWW page. CWW displays each type of alert assigned to a case once, and any worker who has update access to the case has the ability to delete the alert.

The screenshot shows the CARES Worker Web interface. The header includes the user ID (XCTP33), user name (M KHUSHANI), and quick select (CASE/RFA). The case details show the primary person (LOU PICKLES 74M PP), case number (7150776574), status (Open), and mode (Ongoing). The date is 3/5/18/2014. The navigation menu on the left includes options like Search, Unsubmitted Requests, and RFA / Case. The main panel displays a list of action items for April 18, 2014, and April 16, 2014. The first action item is 'CONFIRM AGECE IF CORRECT', which is highlighted with a red box. Below the action items is a table titled 'Other Program Results' with columns for Run, Assistance Group, Sequence, Benefit Begin Date, Benefit End Date, AG Status, Eligibility Status, and Reasons.

Run	Assistance Group	Sequence	Benefit Begin Date	Benefit End Date	AG Status	Eligibility Status	Reasons

Updated Functionality: CWW now assigns alerts by worker using worker IDs for most CWW alerts. The worker ID to which the alert is assigned is displayed in front of the alert text in the Action Items panel. If an alert applies to both the W-2 and IM programs, then CWW assigns the alert to both the IM worker and the FEP. If an alert is only relevant to the W-2 program or to the IM program, CWW will assign the alert to the relevant worker, depending upon the program and the security profile. For example the following alert, “Child Turning 8 Weeks Old” will only be assigned to the FEP since it is only relevant to W-2 eligibility.

Workers with the same security profile may only delete alerts as the worker assigned to the alert. In addition, FEPs can only delete alerts that CWW assigns to FEPs within the same office in which the W-2 case is assigned. The same is true for IM workers.

As always, whenever a FEP makes a change in a case, the FEP must enter a case comment documenting the specific change that was made.

CWW will continue to assign some alerts to the case rather than to a specific worker. These alerts auto delete when any worker takes action on the case. The two alerts most commonly shared by IM and W-2 cases that will auto delete are 056 “Run SFU and ED/BC” and 074 “Confirm AGECE If Correct.” A future enhancement will program these alerts to be assigned to specific workers.

The screenshot shows the CARES Worker Web interface. At the top, the user is identified as J KAHL with User ID XCTV59. The primary person is ANNIE MILLAR 44F PP, Case: 7150746977, Status: Open, Mode: Review. The date is 3/5/12/2014. The navigation menu on the left includes options like Search, RFA / Case, Client Registration, Case Summary, Case Comments, Expected Changes, Application Entry (14), Case Information, Individual Demographics, Benefits/School, Individual Non Financial, Other Health Care Programs, Asset Information, and Employment Queries. The main content area displays a list of alerts:

- May 30, 2014
 - XCTV59 - CASE IN REVIEW MODE > 30 DAYS
 - XCTV60 - CASE IN REVIEW MODE > 30 DAYS
- May 10, 2014
 - XCTV59 - REVIEW DUE, LAST REVIEW FTF
 - XCTV60 - REVIEW DUE, LAST REVIEW FTF
- November 29, 2013
 - XCTV59 - CHILD TURNING 8 WEEKS OLD
- October 25, 2013
 - XCTV59 - Person Moved Into Household
 - XCTV59 - Tax Dep/Co-filer moved out

A 'Clear Checked Action Item(s)' button is visible at the bottom right of the alert list.

Checking Alerts

W-2 workers must check their alerts daily and take appropriate action. Workers may delete alerts from either the Action Items list in CWW or on CARES Screen CMWA. CWW will remove the alerts from both screens when a worker deletes them from one of these screens. All alerts for W-2 display on the Action Items list with the exception of PIN based Work Program alerts, which still must be reviewed on CMWA in CARES.

REQUESTING W-2 SERVICES

Current Functionality: There are three options for requesting the W-2 program in CWW:

1. Creating a Request for Assistance (RFA) for individuals who do not have an open case in CWW.
2. Adding W-2 to an open case via the "Record New Group Level Program Request" option on the CWW **Case Summary** page.
3. Changing the No to Yes in the "Requesting this Program/Subprogram of Assistance" field on the CWW **W-2 Request** page.

Options 1 and 2 are the correct options for requesting the W-2 program and ensure that the correct W-2 filing dates are captured. However, there were two known issues that require the agencies to use option 3 above.

First, CWW closes a W-2 case when the W-2 Assistance Group (AG) type is changed. For example, when a pregnant woman has her child, the case should change from a WW_P AG to a WW_C AG because she is now a custodial parent. When running eligibility CWW would incorrectly auto update the W-2 Request field from Yes to No, which would close the W-2 case with reason code 054 (Program Not Requested) when the FEP confirmed the case. In these

situations, the FEP would have to reopen W-2 for the new AG on the W-2 Request page even though it is not a new request for the W-2 program.

Second, when a W-2 review is not completed prior to adverse action in the month the review is due, the W-2 Request auto updates from Yes to No even though the W-2 participant has until the last day of the month to complete the review before eligibility ends and the case closes.

Updated Functionality: As of June 30, 2014, there are only two options for requesting the W-2 program in CWW:

1. Creating a Request for Assistance (RFA) for individuals who do not have an open case in CWW.
2. Adding W-2 to an open case via the "Record New Group Level Program Request" option on the CWW **Case Summary** page.

Using the **W-2 Request** page (third option above) to request the W-2 program for a new or ongoing case is no longer an option. If the FEP goes directly to the **W-2 Request** page to change the No to a Yes on the "Requesting this Program/Subprogram of Assistance" field to request the W-2 program for an individual, the field will be protected and will not allow the change.

BWF corrected the issue associated with changing the AG type, as described above. With regard to W-2 reviews scheduled after adverse action in the month the review is due, CWW will not protect the "Requesting this Program/Subprogram of Assistance" field. FEPs must still flip the W-2 request switch from No to Yes until the end of the month, if appropriate, to prevent the case from closing incorrectly.

ACTION REQUIRED

W-2 agencies must discuss the CWW changes with staff and update any relevant local agency procedures.

CONTACTS

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

DCF/DFES/BWF/JK