

DEPARTMENT OF CHILDREN
AND FAMILIES
Secretary Eloise Anderson
201 East Washington Avenue
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 Kitty Rhoades
1 West Wilson Street
P.O. Box 7850
Madison, WI 53707-7850
Telephone: (608) 266-9622
FAX: (608) 266-7882
www.dhs.wisconsin.gov

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
Department of Health Services

Sue Mathison, Section Chief
Bureau of Child Care Administration
Division of Early Care and Education
Department of Children and Families

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

**BEPS/DECE/BWF OPERATIONS
MEMO**

No: 14-J1

DATE: JANUARY 29, 2014

FS	<input checked="" type="checkbox"/>	MA	<input checked="" type="checkbox"/>	BC+	<input checked="" type="checkbox"/>
SC	<input type="checkbox"/>	CTS	<input type="checkbox"/>	FSET	<input type="checkbox"/>
BC+ Basic	<input type="checkbox"/>	BC+ CORE	<input type="checkbox"/>		
CC	<input checked="" type="checkbox"/>	W-2	<input checked="" type="checkbox"/>	EA	<input type="checkbox"/>
CF	<input type="checkbox"/>	JAL	<input type="checkbox"/>	RAP	<input type="checkbox"/>
Other EP	<input type="checkbox"/>	*			

SUBJECT: Wisconsin Works Eligibility Reviews in CARES Worker Web (CWW)

CROSS REFERENCE: Operations Memo [12-70](#) (except obsolete section titled *W-2 Case Review/Renewal Processing Change*)

EFFECTIVE DATE: February 1, 2014

PURPOSE:

The purpose of this memo is to announce CARES Worker Web (CWW) changes to support Wisconsin Works (W-2) eligibility reviews without affecting Income Maintenance (IM) and Child Care (CC) program reviews.

BACKGROUND

On January 1, 2013, the Department of Children and Families (DCF) implemented the 2013-16 W-2 Contract changes in CWW. The CWW changes enhanced CWW and CARES Mainframe to support the successful implementation of the new W-2 Contracts. However, after the January 1, 2013, CWW changes, when a Financial and Employment Planner (FEP) initiated a review in CWW, it changed the BadgerCare (BC) review date to a future date that resulted in the BC program being out of compliance with the required review period. The Bureau of Working Families (BWF), in coordination with the Department of Health Services (DHS), created a W-2 work-around to allow FEPs to complete six-month eligibility reviews using a manual review process so as not to adversely affect the review dates for BC. BWF has created a new W-2 eligibility review driver flow that will expedite the W-2 review process and will not affect other programs' review dates.

Although the W-2 application and person add driver flows are similar to the new W-2 review driver flow, the changes identified in this memo only apply to the W-2 review driver flow.

Impact on IM and CC Renewal Process

When completing a review for FoodShare, Health Care, or Child Care, IM/CC workers will not see any changes to the IM or CC review driver flows. One enhancement, however, is that the review driver flow for IM or CC programs can be initiated from the **Case Summary** page while the case is in review mode for W-2 as long as the FEP has completed the W-2 driver flow past the **Initiate Eligibility** Page. The FEP does not have to complete confirmation of W-2. See **Completing W-2 Eligibility Reviews** for more information.

CWW W-2 ELIGIBILITY REVIEW DRIVER FLOW

Initiating W-2 Eligibility Reviews

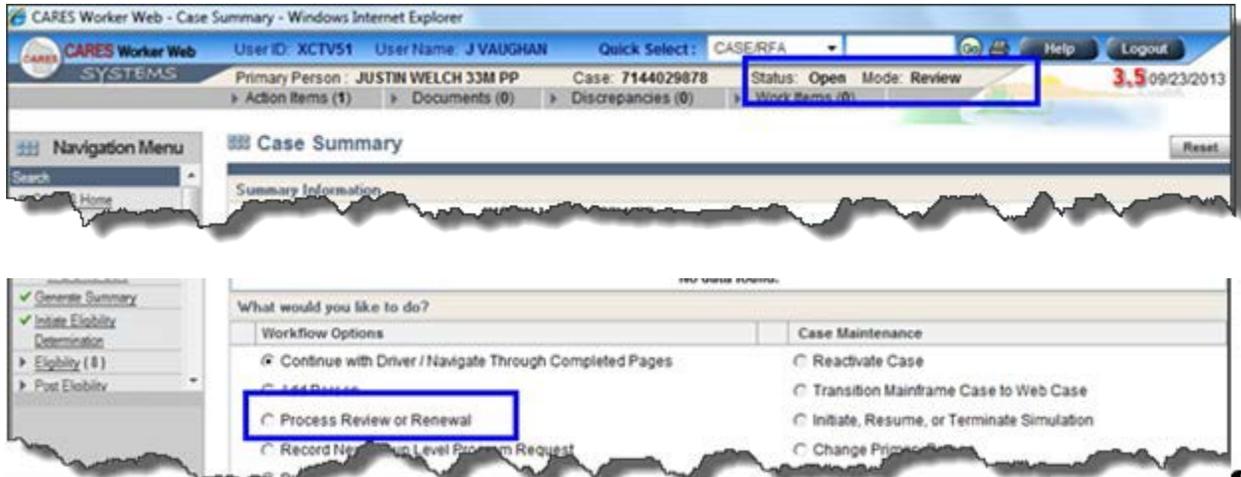
FEPs must complete two steps in order to initiate a W-2 eligibility review and invoke the W-2 review driver flow.

- 1) The FEP must select the Process Review or Renewal button on the CWW **Case Summary** page.

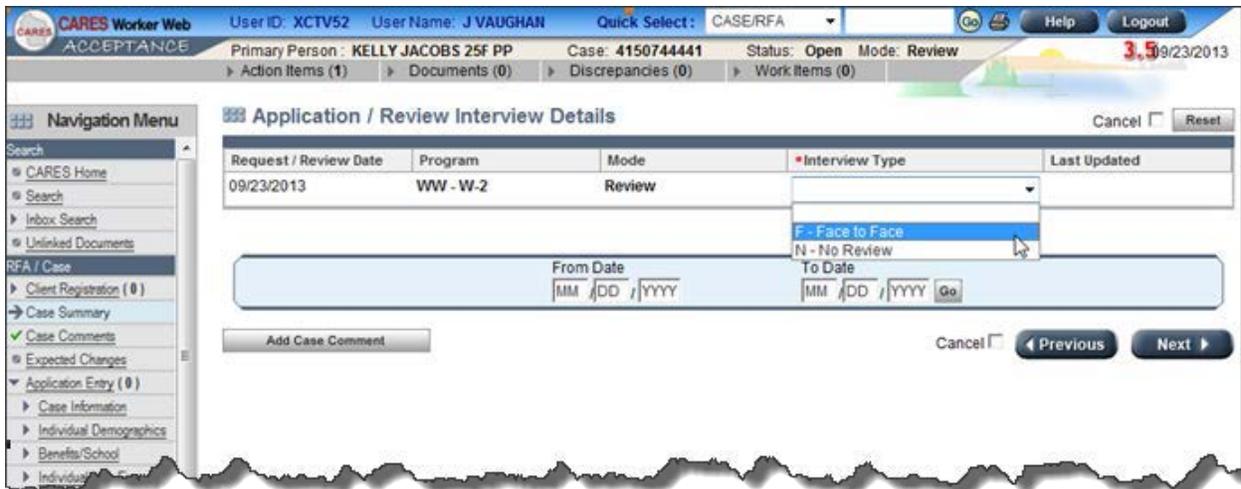
A W-2 case must be in Open Status, and in either:

- ◆ Ongoing Mode; or
- ◆ Review Mode.

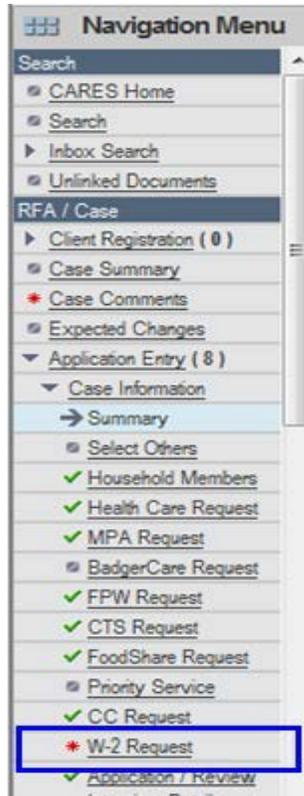
If a combined case (IM, CC, and W-2) is in Review mode, the worker conducting the review for his or her program must complete the **Initiate Eligibility** page before the other worker can initiate an eligibility review for his or her program. However, if a worker has not yet completed the **Initiate Eligibility** page during the review, the Process Review or Renewal button on the **Case Summary** page will remain disabled. See **Completing W-2 Eligibility Reviews** for more information.



- 2) The FEP must select an Interview Type from the **Application/Review Interview Details** page for the WW – W-2 Program and click Next to start the W-2 Review Driver Flow. Security restrictions on the page limit FEPs to selecting the Interview Type for the W-2 program.



Once the FEP has completed these two steps, CWW will schedule specific W-2 program pages. CWW will schedule the **W-2 Request** page and will no longer schedule any of the IM program request pages. FEPs are only required to update the information on the **W-2 Request** page.



9-month Live Edit

In most instances, a FEP will be able to process a W-2 review without visiting any of the other program request pages. However, occasionally FEPs will be prompted at eligibility to revisit non-W-2 program request pages due to the 9 month live edit functionality. This means that if information on a program request page has been updated within the last 30 days, but the dates in the **Begin Month** and program **Request Date** fields are 9 months or more in the past, those dates will need to be changed to the current month and year in order to run eligibility. The worker would then manually navigate back to the other program request pages using the Navigation Menu.

Scheduling Gatepost Pages

When a FEP makes updates to the **W-2 Request** page, CWW will schedule in the review driver flow only the gatepost pages required for W-2.

On the Navigation Menu, a red asterisk identifies pages that need to be completed during the W-2 review, the green check mark identifies pages that already are completed or are not required.

Based on the information entered on the gatepost page, CWW will schedule any relevant detail pages. Any gatepost questions that previously had a value of YES will retain their YES values as read-only, which will schedule the corresponding details pages so the FEP can re-verify eligibility information. Any gatepost questions that previously had a value of NO will clear the NO value and the FEP will need to re-enter this information.

In addition, the Subsidized Housing question has been placed on the **W-2 Request** page and the field name changed to **Low Income Subsidized Housing Status**. This question is required at intake and review for federal TANF reporting purposes. The question was moved to the **W-2 Request** page so that the **Expenses Gatepost** page and subsequent expenses detail pages will not be scheduled during W-2 reviews.

The screenshot displays the CARES Worker Web interface for a W-2 Request. The top navigation bar shows the user ID (XTE200), name (G ANNYAPU), and case details (Case: 5000550358, Status: Pending, Mode: Intake). The main content area is titled "W-2 Request" and includes a "Cancel" button and a "Reset" button. The form is divided into several sections:

- Effective Period:** Begin Month: 10 / 2013, Last Updated: 10/31/2013
- Request Details:** W-2 Request Date: 10 / 31 / 2013, Requesting this Program / Subprogram of Assistance?: No
- Subsidized Housing Information:** Last Updated: 10/31/2013, Effective Month: 10 / 2013, Low-Income Subsidized Housing Status: 1 - PUBLIC HOUSING

A navigation menu on the left side lists various options such as "CARES Home", "Search", "Unsubmitted Requests", "Inbox Search", "Unlinked Documents", "SeniorCare", "RFA / Case", "Client Registration (0)", "Case Summary", "Case Comments", "Application Entry (4)", "Case Information", "Summary", "Select Others", "Household Members", "Health Care Request", "MPA Request", and "Reschedule Request".

Scheduling Detail Pages and Clearing Verifications Fields

CWW will schedule any relevant detail pages based on the information entered on the gatepost pages. This may include information that affects eligibility for other IM/CC programs.

When a detail page is scheduled, CWW will clear verification fields of their previously entered values if the verification fields are necessary for W-2 eligibility. Other previously entered values unrelated to W-2 will be retained so that they can be re-verified at their respective program reviews. This also applies to previously entered information on pages not scheduled in the W-2 review driver. Pages marked as complete with a green check mark will not clear the previously entered information at a W-2 review if the information is not relevant to W-2.

In the example below, CWW cleared the **Asset Amount Verification** field when the FEP initiated the W-2 review driver because the FEP is required to re-verify asset information during a W-2 eligibility review. In addition, in the example below, empty fields not collected for W-2 are beige colored.

CARES Worker Web - Liquid Assets - Windows Internet Explorer

CARES Worker Web User ID: XCTV51 User Name: J VAUGHAN Quick Select: CASE/RFA Help Logout

Primary Person: FAITH CRAMMER 36F PP Case: 4002340945 Status: Open Mode: Review 3.5 09/23/2013

Action Items (2) Documents (0) Discrepancies (0) Work Items (0)

Navigation Menu

Liquid Assets Cancel Reset

The following event has occurred:

GLO36: Please select an entry for Verification (Asset Amount).

Completed 0 of 1

Effective Period

Begin Month: 04 / 2013 End Month: MM / YYYY Last Updated: 09/06/2013

Delete Reason:

Additional Information

Individual: FAITH CRAMMER 36F PP Sequence: 1

Type: CA - CASH Verification: NQ - NOT QUESTIONABLE

Jointly Owned? N - No Available? Y - Yes

Burial?

Asset Amount: \$ 100 .00 Verification:

Independence Account Information

Independence Account? Registration Date: MM / DD / YYYY

Pre-independence Account Balance Amount: \$

Financial Institution Name And Address Information

Account Number:

Name:

Address:

In the example below, CWW did not clear the highlighted verification fields when the FEP initiated the W-2 review driver because this information is not required for W-2 eligibility and is therefore not required to be re-verified during a W-2 review.

- **Note:** Some of these fields will be released as part of the Modified Adjusted Gross Income (MAGI) changes for BadgerCare Plus and are not currently in CWW.

HEALTH INSURANCE PREMIUMS

Totals and Comments Calculate

Monthly In-kind Amount	\$ 5 .00	Verification: AF - AGENCY FORM
Total Amount Per Pay Period	\$ 200 .00	
Monthly MA Gross Amount	\$ 200 .00	Verification: AF - AGENCY FORM
Override MA Gross Amount	\$ 10 .00	
Monthly BC+ Pre-Tax Deductions Amount	\$ 5 .00	
Monthly BC+ Taxable Amount	\$ 5 .00	Verification: AF - AGENCY FORM
Override BC+ Taxable Amount	\$ 0 .00	
Monthly Converted Amount	\$ 200 .00	Verification:
Override Converted Amount	\$.00	
Monthly Total Hours:	20	
Monthly Override Hours:	2	
TJB Subsidy:	\$.00	
Comment:		

Current Size: characters (characters max)

Completing W-2 Eligibility Reviews

The FEP must complete the W-2 eligibility review driver and run eligibility before an IM/CC worker can initiate an IM or CC program eligibility review for that same case.

During the W-2 eligibility review, when the FEP completes the **Initiate Eligibility** page by clicking on the Next button, the IM/CC worker can begin their program reviews. If the FEP does not confirm the case after running eligibility, the case will remain in Open and Review status. In order to set the case to Open and Ongoing, the FEP must confirm the case.

Two important notes regarding completing W-2 reviews and confirming cases:

1. When W-2 eligibility is confirmed on a combined case that has eligibility unconfirmed for any other program(s), the FEP must notify the IM/CC worker to confirm eligibility for the other program(s). Similarly when IM/CC eligibility is confirmed on a case with eligibility unconfirmed for the W-2 program, the IM/CC worker must notify the FEP to confirm eligibility for the W-2 program. This notification must be via email or phone contact to ensure timely processing of W-2 and IM cases.
2. It is preferable for FEPs to complete a W-2 eligibility review prior to Adverse Action in the month that the W-2 review is due. Adverse Action is usually 13 calendar days prior to the last day of the month and it is the last day a change can be made in CWW or CARES to affect eligibility for the following month. Adverse Action dates can be found on the CARES Batch Schedule (three-letter code is ACT).

ADDITIONAL CHANGES TO CWW

Additional changes were made to CWW in order to assist workers during reviews and to align CWW functionality with W-2 policy.

Vehicle Value Look-Up Tool

A link has been added to the **Vehicle Assets** page that allows workers to look up the fair market value of vehicles in the Kelly Blue Book. The Value Look-Up link connects to <http://www.kbb.com/>.

A screenshot of a web form. The 'Fair Market Value' field is highlighted with a blue box and contains the value '1500' with a 'Value Look-Up' button next to it. Below it are 'Amount Owed' and 'Equity Value' fields, both containing '1500.00'. To the right, the 'Source' dropdown menu is set to 'OT - OTHER' and the 'Verification' field is empty.

Address Verification

While FEPs are required to verify Wisconsin residence, they are not required to collect address verification for the W-2 program. Therefore, on the **General Case Information** page, the FEP will no longer be required to enter information in the **Address Verification** field at intake or reviews. Based on the new CWW functionality, this field will be beige for all programs except CC. However, if the **Address Verification** field is required for another program requested at the same time as W-2, the field may be required for the other program.

A screenshot of the 'General Case Information' form. The 'Household Address' section is visible, including fields for County of Residence (40 - MILWAUKEE COUNTY), Number (865), Unit, Direction (S - SOUTH), St / Rural Rt / Box Number (26TH), Suffix (ST - STREET), Quadrant, and Apt. Below this is the 'City' (MILWAUKEE), 'State' (WI - WISCONSIN), and 'ZIP' (53204) fields. The 'Address Verification' dropdown menu is highlighted with a blue box. The 'Contact Information' section at the bottom shows 'Work Phone' and 'Message Phone' fields.

Relocation of the Subsidized Housing Question

Effective December 28, 2013, the Subsidized Housing question currently located on the **Expenses Gatepost** page will be placed on the **W-2 Request** page and the field name will change to **Low Income Subsidized Housing Status**.

This question is required at intake and review for federal TANF reporting purposes. The question is being moved to the **W-2 Request** page so that the **Expenses Gatepost** page and subsequent expenses detail pages will not have to be scheduled during W-2 reviews.

The screenshot displays the CARES Worker Web interface for a W-2 Request. The top navigation bar includes the user ID (XTE200), name (G ANNYAPU), and case information (Case: 5009550358, Status: Pending, Mode: Intake). The left sidebar contains a navigation menu with options like 'CARES Home', 'Unsubmitted Requests', and 'Client Registration'. The main content area shows the 'W-2 Request' form with the following details:

- Effective Period:** Begin Month: 10 / 2013, Last Updated: 10/31/2013
- Request Details:** W-2 Request Date: 10 / 31 / 2013, Requesting this Program / Subprogram of Assistance?: No
- Subsidized Housing Information:** Last Updated: 10/31/2013, Effective Month: 10 / 2013, Low-Income Subsidized Housing Status: 1 - PUBLIC HOUSING

ACTION REQUIRED

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

CONTACTS

BEPS CARES Information & Problem Resolution Center

For Child Care policy questions outside of Milwaukee County: Bureau of Regional Operations (BRO), Child Care Coordinators at <http://dcf.wisconsin.gov/files/regionaloperations/pdf/contactlist.pdf>

For Child Care CARES/CWW, CSAW, and CCPI IT systems processing questions statewide and policy questions in Milwaukee County: Child Care Help Desk at 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

DCF/DFES/BWF/JK