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State of Wisconsin  
Governor Scott Walker



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

FROM: Margaret McMahon, Director  
Bureau of Working Families  
Division of Family and Economic Security  
Department of Children and Families

**BWF OPERATIONS MEMO**

No: 16-11

DATE: 07/01/2016

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: Modernizing CARES Work Programs Subsystem – Updated  
Wisconsin Works Backdating and Future-Dating Policy**

**CROSS REFERENCE:** Administrator's Memo [16-02](#): W-2 MPOWR Upcoming Policy Changes and System Enhancements  
Operations Memo 06-23: New W-2 Backdating and Future-Dating Policy (Obsolete)  
[New W-2 Manual Section 7.7.1 Backdating Placements](#)  
[New W-2 Manual Section 7.7.2 Future-Dating Placements](#)

**EFFECTIVE DATE:** June 25, 2016

**PURPOSE**

The purpose of this Operations Memo is to communicate changes to the backdating and future-dating policies for Wisconsin Works (W-2) placements and episodes related to moving W-2 placement functionality from the CARES Work Programs (WP) subsystem to CARES Worker Web (CWW).

**BACKGROUND**

As outlined in Administrator's Memo [16-02](#), one of the Department of Children and Families' goals is to move case-based CARES WP screens to CWW. This memo focuses on the changes to the backdating and future-dating rules of W-2 placements and episodes associated with the moving of CARES screens WPWW and WPFRR to a new **W-2 Placement** page in CWW. This is one memo in a series of memos describing the changes to CWW, describing any related policy changes, and reminding W-2 agencies of the actions they must take in order to prepare for the changes.

There are three fields relevant to backdating and future-dating located on the CWW W-2 Placement page: 1) Episode End Date, 2) Placement Begin Date (Individual Placement Information section), and 3) Placement Begin Date (Future Placement Information section). Some rules depend on where in a W-2 episode a placement falls, e.g., *initial* W-2 employment position placement in a single W-2 episode or *subsequent* W-2 employment position placement in the same W-2 episode.

**W-2 Placement**
Cancel

Completed 0 of 1

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**Record Management**

Last Updated: 06/01/2016 Episode Number: 1  
 Delete Reason:

**Financial Employment Planner**

Current FEP ID:   
 Reassign FEP ID:

**W-2 Episode**

Initial W-2 Eligibility Confirmation Date: 05/24/2016  
 Episode Begin Date: 05/26/2016  
1 Episode End Date:  MM/DD/YYYY
 Work Program End Reason 1:   
Work Program End Reason 2:

**Individual Placement Information** Check for Non-CMF Placement Eligibility

2 Individual:  EFT on file:  Account Holder:   
 Placement:  Account Type:   
 Placement Begin Date:  MM/DD/YYYY Account Number:   
 Routing Number:

Individual	Placement	Begin Date	End Date	Invalid
	CS1 - 1/3 COMMUNITY SERVICE JOB	06/02/2016		✔
	CS2 - 1/2 COMMUNITY SERVICE JOB	06/01/2016	06/01/2016	✔
	CSJ - FULL COMMUNITY SERVICE JOB	05/26/2016	05/31/2016	✔

**Future Placement Information** Clear

3 Individual:   
 Placement:   
 Placement Begin Date:  MM/DD/YYYY

**POLICY AND SYSTEM CHANGES**

- **Note:** Included as an attachment to this memo is a revised chart from Operations Memo 06-23 that compiles all of the backdating and future-dating rules. The new chart will become two charts, Backdating and Future-Dating, and these charts will be incorporated

in the W-2 Manual as Sections 7.7.1 and 7.7.2 with the effective date of this memo. Therefore, these changes obsolete Operations Memo 06-23.

1. W-2 EPISODE BEGIN DATE

The only change to the previous backdating and future-dating rules regarding the W-2 Begin Date is that the field name has changed from "W-2 Begin Date" to "W-2 Episode Begin Date". This change will clarify the difference between a W-2 Episode Begin Date, when an individual is determined eligible for W-2; and a W-2 Placement Begin Date, when an individual begins a W-2 Placement within a W-2 Episode.

2. W-2 EPISODE END DATE

The only change to the backdating rule regarding the W-2 End Date is that the field name has changed from "W-2 End Date" to "W-2 Episode End Date". Similarly, this change will clarify the difference between a W-2 Placement End Date, the last day an individual is in a W-2 Placement; and a W-2 Episode End Date, the last day an individual receives W-2 services before leaving the program.

Previously, only a Custodial Parent of an Infant (CMC) placement could be ended at a future date of up to 10 calendar days. This rule has been changed to allow any W-2 Placement to have a future W-2 Episode End Date up to the last day of the last month eligibility is open. This change will improve worker efficiency and reduce the need for overpayments due to a case remaining open after the participant was no longer eligible.

- **Note:** If a case is closing due to a Work Program reason, the future-dating rule does not apply. Cases closing due to a Work Program reason must close on the current date. There are four Work Program reasons: 1) 044 - You do not live in the W-2 Geographical Area; 2) 136 - You have lost contact with the agency; 3) 219 - An adult in family failed to complete Job Search activities; 4) 558 - Your Employability Plan has expired. The Financial and Employment Planner (FEP) must only use the current date for these Work Program reasons because the W-2 Episode must end on the date the decision is made to end the case.

3. PLACEMENT BEGIN DATE

There are no changes to the backdating rules regarding the Placement Begin Date.

There are no changes to the future-dating rules for an *initial* W-2 Placement Begin Date. An initial Placement Begin Date must be the same date as the W-2 Episode Begin Date.

Previously, only a subsequent Case Management Denied (CMD) placement could have a future Placement Begin Date of up to 10 calendar days. This rule has been changed to allow any *subsequent* placement, with the exception of a CMC placement, to have a future Placement Begin Date of up to 10 calendar days. CMC placements must begin on the current date or a previous date.

The **Future Placement Information** section of the CWW W-2 Placement page will allow for better case management planning and minimize overpayments. Under the **Individual**

**Placement Information** section on that same page, FEPs will be able to view all of the participant's historical placement information for the current W-2 Episode. This will also assist the FEP with case management planning and ensure the participant is making progress towards his or her employment goals.

#### 4. PLACEMENT END DATE

There are no changes to the backdating or future-dating rules regarding Placement End Date. This date remains auto-populated by CWW based on the W-2 Episode End Date or, if a new placement is entered within a W-2 episode, the Placement Begin Date of the new W-2 placement. The Placement End Date of the previous placement is one day prior to the Placement Begin Date of the new placement or equal to the W-2 Episode End Date.

### **AGENCY ACTION**

W-2 agencies must familiarize staff with these changes and update any relevant local agency procedures.

### **ATTACHMENT**

[New W-2 Manual Section 7.7 Placement Dating](#)

### **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/ERR and JK