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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: 17-03

DATE: 1/27/2017

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: *Processing New Wisconsin Works Applications*

CROSS REFERENCE: W-2 Manual, Section [1.4.2.1 How to Initiate a W-2 Request Request for Assistance \(RFA\)/Case Processes for W-2 Desk Aid](#)

EFFECTIVE DATE: January 28, 2017

PURPOSE

The purpose of this memo is to communicate a CARES Worker Web (CWW) system change that will allow Financial Employment Planner (FEPs) to process Wisconsin Works (W-2) applications for applicants that do not complete their intake appointment (no-shows).

BACKGROUND

Currently, a FEP must complete all required pages in CWW and run eligibility when an applicant fails to attend the intake interview. This is a difficult, time consuming, and unnecessary process for a FEP. Therefore, in an effort to reduce unnecessary administrative actions and improve case processing efficiency, the Bureau of Working Families is simplifying CWW functionality for no-shows.

POLICY

There are no changes to W-2 policy.

CWW CHANGES

Current Process: FEPs create new Requests for Assistance (RFAs) for applicants who are not currently in open Income Maintenance (IM) cases. For applicants in open IM cases, FEPs do not create RFAs. They use the 'Add Program' functionality located on the Case Summary page.

New Process: FEPs will create new RFAs for all W-2 applicants, including applicants already open in IM cases.

New functionality added to the RFA process allows a FEP to record when an applicant has requested W-2, but is a no-show. A new RFA withdraw reason has been added to CWW. When selected, the 'NOS- No Show for W-2 Intake Appt' will create a new W-2 No Show Denial (W2NS) notice, which correctly identifies the denial reason for failing to complete the W-2 application process. The new withdraw reason will only be available for FEP workers to select and will not display for IM workers.

User ID: XCTV59 User Name: J KAHL Quick Select: CASE/RFA

Primary Person: W-2 NO SHOW 22F PP RFA: 5150891452 Status: Pending 3,51/03/2017

Complete Request for Assistance

RFA Dates

Contact Date: 01 / 03 / 2017

Registration Filing Date: 01 / 03 / 2017

Program Filing Dates

Make all blank Program Filing dates the same as Registration filing date

Health Care (Including Medicare Premium Assistance):	Not Requested
Family Planning Waiver:	Not Requested
Caretaker Supplement:	Not Requested
FoodShare:	Not Requested
Child Care:	Not Requested
W-2:	01 / 03 / 2017

Extension

Extension Date: MM / DD / YYYY Extension Reason:

Withdraw

Withdraw RFA? No Withdraw Reason:

- AGY - AGENCY ERROR
- CWD - CLIENT WITHDREW
- DPA - DUPLICATE APPLICATION
- EXT - EXTENSION EXPIRED
- NOS - NO SHOW FOR W-2 INTAKE APPT
- P30 - RFA PENDING FOR OVER 30 DAYS
- RWD - PP IN ACTIVE CAPO CASE

Next

CWW Process

CWW Steps for Processing all W-2 Requests:

1. On the Navigation bar, click on Client Registration.
2. Complete the **Basic Information** page and click Next.
3. When the **Potential Individual Matches** page displays, regardless of whether there is a match, do not select the radio button for an individual. Instead, select 'Create new RFA using entered Basic Information.
4. If CWW believes that there is an individual match, it will redisplay the page with a warning message 'CR005: One of the matches has the same SSN as the information

you entered. Please click 'Next' only if you are sure you wish to create a new RFA for this existing individual.' Reselect the 'Create new RFA using the entered Basic Information' radio button and click 'Next'.

5. The **Additional Information** page will display and any missing fields must be completed, and then click 'Next'.
6. Select 'Yes' for W-2 on the **Program Requests** page and click 'Next'.
7. **Print Application Registration** page displays. Print the CARES Application Registration Form from this page and have the applicant sign and date form. Click 'Next'.
8. When the **Complete Request for Assistance** page displays, enter the Registration Filing Date and the W-2 Program Filing Date and click 'Next'.
9. Enter RFA Comments. Click 'Next'.
10. Then the **RFA Summary** page will display, which is the last page in the Client Registration flow. Review for accuracy, and go back to prior pages if errors are found and make any corrections.

CWW Steps for Intake Interview when the Applicant attends appointment:

1. Begin the Intake driver flow on the **RFA Summary** page by selecting the 'Begin Intake Interview' radio button. Click 'Next'.
2. Enter the Social Security Number, Gender, and Date of Birth on the **Review Basic Information** page (if not entered during the RFA process). Click 'Next'.
3. The **Individual/Case Clearance Results** page should display the individual if they are currently open in another CWW case. Select the matched individual and click 'Next'. If there is no matched individual you will just click 'Next'.
4. For those with a matched individual, the **Merge RFA with Case** page will display both the new and the existing case information. Select 'Keep Existing Information' and click 'Next'. This will complete the RFA merge with the current CWW case which you can validate by looking on the **Complete Request for Assistance** page which now has system entered an RFA withdraw reason 'DPA – Duplicate Application'.
5. On the **Case Summary** page, select the 'Continue with Driver/Navigate' radio button and click 'Next'.
6. Confirm the W-2 Request is 'YES' and click 'Next'.
7. Enter Case Comments if appropriate and click 'Next'.
8. Continue through Add Program driver flow.

CWW Steps for Intake Interview when Applicant does not attend appointment:

1. On the Navigation bar, click on 'Client Registration'.
2. Go to the **Complete Request for Assistance** page and put a 'Yes' in **Withdraw RFA?** Field, select the Withdraw Reason: 'NOS- No Show for W-2 Intake Appt' and click 'Next'.

After completing these two steps, the **RFA Summary** page will display and the RFA Status will show 'Withdrawn'. The Withdraw Reason will display 'NOS – W-2 No Show'. CWW will then generate a W2NS notice that will be mailed to the applicant.

- **NOTE:** If an applicant fails to attend the intake appointment, and the FEP uses the old process of recording a program add for an open CWW case and fails to create a new RFA, the FEP will be required to go through the entire driver flow to close the W-2 program add request.

AGENCY ACTION

W-2 agencies must familiarize staff with these changes and update all 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