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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:	**17-07**				
DATE:	**04/18/2017**				
W-2	☒	**EA**	☐	**CF**	☐
JAL	☒	**RAP**	☐	**Other EP**	☐*

SUBJECT: Client Scheduling Policy Changes and CWW Enhancements

CROSS REFERENCE: ACCESS Handbook – Department of Health Services
Operations Memo 17-J4 *Changes to Email Collection and Electronic Correspondence*
Operations Memo 17-08 *ACCESS Enhancements for Wisconsin Works*

EFFECTIVE DATE: **APRIL 22, 2017**

PURPOSE

The purpose of this memo is to provide an overview of changes to Client Scheduling in CARES Worker Web (CWW) and the associated policy changes that the Bureau of Working Families has made in an effort to modernize the CARES Work Programs subsystem.

BACKGROUND

Client Scheduling in CWW allows Wisconsin Works (W-2) workers to assign various appointments to participants using appointment activity types. This tool creates a log of appointments in a single system that the W-2 worker can manage and demonstrate whether a participant is attending required appointments. Client Scheduling is currently required for the Food Stamp Employment and Training (FSET) program. While W-2 workers have been encouraged to use Client Scheduling, it has not been required in W-2 program policy.

POLICY

Beginning April 22, 2017, W-2 workers are required to use Client Scheduling in CWW. Using the Client Scheduling functionality ensures that W-2 participants' appointments are recorded in CWW and that they receive system-generated notices of these appointments. Updates to W-2 Manual Sections 1.2.1, 1.4.2, and 1.4.5 reflect this new policy.

CWW CHANGES

New Client Scheduling Appointment Activity Types and Notices

The ACCESS project updates and changes several of the Client Scheduling appointment activity types and related notices. Currently, the Income Maintenance (IM), Childcare (CC), and W-2 programs share appointment activity types IO, EH, and EO for scheduling case level eligibility appointments. On April 22, 2017, these codes will apply only to the IM and CC programs. W-2 workers must not use these codes for scheduling W-2 eligibility appointments. W-2 agencies must use the new AP, AH, and AE Client Scheduling appointment activity types when scheduling W-2 application and review appointments.

Additionally, W-2 agencies must now use appointment activity type PR when scheduling W-2 placement appointments and use RS when scheduling appointments with Resource Specialists.

W-2 Eligibility Appointment Activity Types and Notices

The chart below lists the shared Request for Assistance (RFA)/Case based intake and review appointment activity types currently in use in the Client Scheduling functionality, and the new W-2 client scheduling appointment activity types W-2 workers must use starting on April 22, 2017.

Current Shared Intake and Review Appointment Activity Types		New W-2 Intake and Review Appointment Activity Types		Notice Documentation Code
ES Intake Interview/Office and Home	IF/IO	W-2 Application	AP	CSW2
Eligibility Review/Home	EH	W-2 Eligibility Review/ Home	AH	CSW3
Eligibility Review/Office	EO	W-2 Eligibility Review/Office	AE	CSW4

Two additional Client Scheduling appointment activity types and corresponding notices are available for W-2 specific home and office eligibility reviews:

- Notice CSW3 (AH) - Used for W-2 review appointments scheduled at the participant's home; and
- Notice CSW4 (AE) - Used for W-2 review appointments scheduled at the W-2 agency.

These notices are not available to view until the next business day after the appointment is scheduled and CWW generates the notice.

Scheduling a Resource Specialist appointment using the appointment activity code RS triggers the CSW1 notice. This notice is immediately available in CWW to preview and print when the appointment is scheduled.

Action Required: Attend Your Scheduled Wisconsin Works (W-2) Application Appointment

The State of Wisconsin is an equal opportunity service provider. This letter contains information that affects your benefits. If you need this material in a different format because of a disability or if you need this letter translated or explained in your own language, please call 608-266-3400 or 711 (TTY).

To be eligible for W-2 you must complete an application. An appointment to discuss your application has been scheduled for you at:

Appointment Details

Date and Time	Worker Information	Location
01/17/17 03:00 PM	KIRAN GANGALA (555) 555-5555	JONEM BASKUN PO BOX 411 W3236 WOLF RIVER DRIVE KESHENA WI 54137

Things you need to know:

- If you do not complete an application, your eligibility may be denied.
- Contact the agency listed above if you cannot make this appointment and need to change the date or time.
- An authorized representative may complete the W-2 interview for you.
- If you have an ACCESS account, you can view your upcoming appointments, W-2 placement and payment information online at: www.access.wi.gov.
- If you have already had your appointment, disregard this letter.

W-2 Placement Activity Code and Appointment Notice

W-2 workers must use the appointment activity type PR to schedule W-2 placement appointments. The W-2 Placement Appointment Notice (CSLB) is automatically generated upon scheduling.

W-2 workers must continue to use the appointment activity type EP for scheduling Employability Plan reviews.

The April 22, 2017 system changes will repurpose the Employability Plan Review Notice (CSLB). Scheduling a W-2 Placement Appointment using the appointment activity type PR triggers the CSLB notice, now known as the W-2 Placement Appointment Notice. This notice is immediately available in CWW to preview and print when the appointment is scheduled.

Action Required: Attend Your Scheduled Wisconsin Works (W-2) Placement Appointment

	The State of Wisconsin is an equal opportunity service provider. This letter contains information that affects your benefits. If you need this material in a different format because of a disability or if you need this letter translated or explained in your own language, please call 608-266-3400 or 711 (TTY).

As part of your participation in the W-2 program, you will be assigned a W-2 placement. A placement appointment has been scheduled for you:

Appointment Details

Date and Time	Worker Information	Location
01/17/17 03:00 PM	KIRAN GANGALA (555) 555-5555	JONEM BASKUN PO BOX 411 W3236 WOLF RIVER DRIVE KESHENA WI 54137

Things you need to know:

- If you do not complete this appointment, your eligibility may be denied.
- Contact the agency listed above if you cannot make this appointment and need to change the date or time.
- An authorized representative may complete the W-2 interview for you.
- If you have an ACCESS account, you can view your upcoming appointments, W-2 placement and payment information online at: www.access.wi.gov.
- If you have already had your appointment, disregard this letter.

Note: Client Scheduling offers several other appointment activity types and notices; any of the appointment activity types not identified as new or changed in this memo remain unchanged.

AGENCY ACTION

Beginning April 22, 2017, W-2 workers must use Client Scheduling in CWW and the new appointment activity types. W-2 agencies must familiarize staff with these changes and update any relevant local agency procedures. Client Scheduling for New Workers training is available through the PTT Learning Center.

ATTACHMENTS

Revised W-2 Manual Sections 1.2.1, 1.4.2, and 1.4.5

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/DA and JK