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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: 17-19

DATE: 08/30/2017

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: *Ending Educational and Vocational Training Activity Codes*

CROSS REFERENCE: [Operations Memo 16-20: Wisconsin Works \(W-2\) Contractor Payment Structure for 2017 W-2 and Related Programs Contracts](#)

[Operations Memo 07-55: W-2 Work Participation Documentation, Verification and Supervision Policy and Procedures](#)

[Operations Memo 17-10: Wisconsin Works \(W-2\) Contractor Vocational Training Incentive Payments](#)

EFFECTIVE DATE: IMMEDIATELY

PURPOSE

This memo provides policy and process clarifications to the [2017 W-2 Contractor Payment Structure](#) regarding Wisconsin Works (W-2) Contractor payments for the W-2 Educational Attainment and Vocational Training Incentive.

BACKGROUND

As part of the [2017 W-2 Contractor Payment Structure](#), the Department of Children and Families (DCF) introduced one new Educational Attainment incentive payment and two new Vocational Training Incentive payments. Section 6 of the W-2 Contract Payment Structure document states that, "DCF will pay a **one-time** Educational Attainment incentive for a participant's educational attainment of a High School Diploma or equivalency. DCF will pay a **quarterly** Vocational Training Incentive for each month a participant is assigned to Job Skills (JS) or Technical College (TC) activities and is in our numerator. DCF will also pay a **one-time** Vocational Training Incentive for the successful completion of the JS or TC activity."

As specified in [Operations Memo 16-20](#), W-2 Contractors must only enter the CARES work programs activity completion code of <A-Successfully Completed> if the participant has completed the entire Job Skills, Vocational Training, or Educational Attainment program. When adjudicating claims for the Educational Attainment incentive payments and Vocational Training incentive payments, DCF has observed that an increasing number of participants' educational activities on CARES screen WPCS have been closed with the completion code of <A-Successfully Completed> when the participant has not successfully completed the activity by obtaining the education credential.

The majority of the erroneously coded educational activities occurred when the Financial and Employment Planner (FEP) updated the Employment Plan (EP). The FEP ended the educational activity with a completion code of <A-Successfully Completed> and then reopened the activity. Ending the activity with the <A-Successfully Completed> when the participant has not successfully completed the activity issues an erroneous payment to the W-2 Contractor.

PROCESS CLARIFICATION

CORRECTLY ADJUSTING HOURS OF ACTIVITIES ON CARES SCREEN WPCS

Current Process: [Operations Memo 07-55](#) provides direction on adjusting hours of participation for assigned activities on WPCS. Specifically, if a worker determines that the hours that an activity is assigned on WPCS should be either increased or decreased, the worker must record an Actual End Date for the activity and re-enter the activity with a new Begin Date. The new weekly and daily scheduled hours must reflect the change in the number of assigned hours.

Process Clarification: This process clarification applies to all closures of assigned activities; however, appropriately adjusting educational and vocational training activities on WPCS is especially important in order to avoid triggering erroneous Educational Attainment and Vocational Training incentive payments.

For any assigned activity not completed prior to the review of the EP or if the number of hours assigned in the subsequent EP will change, the FEP must end the activity on WPCS using the completion code of <B-Unsuccessfully completed/interrupted> and re-enter the activity with a new Begin Date.

Example 1: Anna has been participating in General Educational Development (GED) classes for 10 hours per week. Anna's EP is due for a 6-month review. Anna will continue to participate in GE classes but will increase the hours to 15 hours per week. Anna's FEP ends the GE activity on WPCS by entering <B-Unsuccessfully completed/interrupted> because there is an increase or decrease in the assigned activity hours. Anna's FEP then reopens the GE activity reflecting the updated activity hours. One month later, Anna attains satisfactory scores on the GED tests. The FEP ends the GE activity on WPCS with the completion code of <A-Successfully Completed>. The FEP scans the satisfactory scores on the GED tests into Electronic Case File (ECF) using the POPD folder under the PIN within 8 weeks of the successful completion.

Example 2: Dora has been participating in General Educational Development (GED) classes for 10 hours per week. Dora's EP is due for a 6-month review. Dora will continue to participate in GE classes for 10 hours per week. Dora's FEP keeps the GE activity open on WPCS by entering a new anticipated end date since there is no increase or decrease in the assigned hours. Dora's FEP aligns the extended anticipated end date on WPCS with the EP end date. One month later, Dora attains satisfactory scores on the GED tests. The FEP ends the GE activity on WPCS with the completion code of <A-Successfully Completed>. The FEP scans the satisfactory scores on the GED tests into ECF using the POPD folder under the PIN within 8 weeks of the successful completion.

ADJUDICATION POLICY CHANGES

ACCEPTABLE DOCUMENTATION FOR EDUCATIONAL AND VOCATIONAL ATTAINMENTS

Current Policy: DCF did not specify in the [2017 W-2 Contractor Payment Structure](#) which documentation it would accept as evidence of an Educational Attainment component of the incentive. DCF provided the verification requirements for the Vocational Training component of the incentive in [Operations Memo 17-10](#).

New Policy: For the Educational Attainment component of the incentive, DCF will accept a copy of the High School diploma **or** a printout of GED or High School Equivalency Diploma (HSED) test scores as documentation to support that the participant has passed the GED or HSED tests.

For the Vocational Attainment incentive, DCF will accept a copy of the diploma, a copy of the official transcript from a registrar's office, or a written communication from the school of record stating completion as verification of the Vocational Training completion. DCF has added this policy to the [2017 W-2 Contractor Payment Structure](#).

TIMEFRAME FOR SCANNING VERIFICATION DOCUMENTATION FOR EDUCATIONAL AND VOCATIONAL TRAINING

Current Policy: The [2017 W-2 Contractor Payment Structure](#) states that the W-2 Contractor must scan verification of the educational and vocational training attainments into the participant's ECF using the code POPD under the PIN.

Individual Search x

Search Criteria: Class: ECF Documents
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New Policy: After the W-2 Contractor has entered the completion code of <A-Successfully Completed> for an educational attainment, DCF will allow the W-2 Contractor 8 weeks to scan the documentation into ECF using the code POPD under the PIN. Day 1 of the 8 weeks will be the calendar day following the completion code entry.

After the W-2 Contractor has entered the completion code of <A-Successfully Completed> for a vocational attainment, DCF will allow the W-2 Contractor until March 31 of the year following the contract year to scan the documentation into ECF using the document code POPD under the PIN.

DCF will take back any Educational Attainment and Vocational Training incentive payments that it has made if the W-2 Contractor has not scanned the verification documentation into ECF within 8 weeks of entering the completion code or by March 31 of the year following the contract year for vocational training completion.

DCF has added this policy to the [2017 W-2 Contractor Payment Structure](#).

INCENTIVE PAYMENT TAKE BACKS

DCF will issue only one payment per participant for an educational attainment and one payment per participant for the vocational training completion. To avoid take-backs for erroneous Educational Attainment and Vocational Training incentive payments when the participant may still complete the educational activity during the year, DCF will process take-backs for this incentive after the end of the 2017 calendar year.

AGENCY ACTION

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

ATTACHMENTS

[Revised W-2 Contractor Payment Structure 2017-2018 Contracts](#) (changes are shaded)

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

For Performance Outcome Payment Questions: Jason Bergh

DCF/DFES/BWF/JB and ERR