

(Note: This new policy is effective October 27, 2018.)

### **1.5.1.3 Discussing Confidentiality Situations**

The FEP should discuss a participant's confidentiality situation when necessary to assist the participant with safety concerns. At a minimum, the FEP must discuss the participant's confidentiality situation during every eligibility review to address any concerns the participant may have. *Confidentiality situation* refers to the situation that prompted the individual's case to be made confidential. (See 4.5.2)

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## **4.5 Working with Confidential Cases in W-2**

### **4.5.1 Introduction**

W-2 applicants and participants may request to have their cases made confidential in CARES Worker Web (CWW) to restrict access to the case and the information the case contains. When a case is made confidential in CWW, the corresponding Work Programs screens in CARES are also made confidential.

### **4.5.2 Making a W-2 Case Confidential**

The FEP must make an individual's case confidential in CWW in the following situations:

1. When the individual requests the case be made confidential;
2. When the individual is enrolled in the Safe at Home program;
3. When the individual is a victim of or is under the threat of domestic violence or other physical harm;
4. When the individual is an employee of a W-2 agency;
5. When the individual is included in another CWW case that is confidential; or
6. Any situation in which the FEP believes restricting access to an individual's case information is necessary for the individual's protection and well-being.

If the individual was included in another CWW case that closed within the last three years and was confidential at the time of closing, the FEP must discuss with the individual whether the W-2 case should be made confidential.

### **4.5.3 Accessing Confidential Cases in W-2**

Only the FEP assigned to the confidential case and the FEP's assigned supervisor can access the case in CWW, access the Work Programs screens in CARES, and access the case's documents in ECF. If the participant is enrolled in another assistance program, the Income Maintenance (IM) worker assigned to the individual's case and the IM worker's immediate supervisor can also access information from the individual's case.

Other staff within the W-2 agency can access information from a confidential case only when their duties require that they have access to the information. If such access is required, staff must work with the FEP assigned to the confidential case or the FEP's supervisor to obtain the needed information.

If the applicant or participant is enrolled in CWW for another assistance program (i.e., FoodShare, BadgerCare, or Wisconsin Shares) and the case is confidential, the FEP must contact the appropriate agency and work with the appropriate worker to gain access to the case. After the FEP obtains access to the case, the FEP must return the case to confidential status immediately.

If the applicant or participant is enrolled only in W-2 in CWW and requests assistance from another assistance program, the FEP must work with the appropriate worker from the other assistance program to allow access to the confidential case. After the other worker obtains access to the case, the other worker must return the case to confidential status immediately.