Department of Health Services
Division of Medicaid Services
1 West Wilson Street
PO Box 7850
Madison WI 53707-7850

Telephone: 608-266-9622
Fax: 608-266-7882

Department of Children and Families
201 East Washington Avenue
PO Box 8916
Madison WI 53708-8916

Telephone: 608-267-3905
Fax: 608-266-6836

STATE OF WISCONSIN

Date: February 15, 2018

DMS, DECE, and DFES Operations Memo 18-J2

To: Income Maintenance Supervisors
        Income Maintenance Lead Workers
        Income Maintenance Staff
        Workforce Development Boards
        W-2 Agencies
        Training Staff
        Child Care Coordinators
        FSET Agencies

From: Rebecca McAtee, Bureau Director
        Bureau of Enrollment Policy and Systems
        Division of Medicaid Services
        Department of Health Services

        Katherine McGurk, Director
        Bureau of Early Learning and Policy
        Division of Early Care and Education
        Department of Children and Families

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

Affected Programs:
☒ BadgerCare Plus
☒ Caretaker Supplement
☒ Child Care
☐ Children First
☐ Emergency Assistance
☒ FoodShare
☒ FoodShare Employment and Training
☒ Job Access Loan
☐ Job Center Programs
☒ Medicaid
☒ Other Employment Programs
☒ Refugee Assistance Program
☒ SeniorCare
☒ Wisconsin Works
☐ Workforce Innovation and Opportunity Act

**New Functionality in CARES Worker Web for
Manual Letters and Changes to Batch Correspondence**

CROSS REFERENCE

Process Help, Chapter 58 Customer Correspondence

EFFECTIVE DATE

March 3, 2018

PURPOSE

The purpose of this Operations Memo is to announce CARES Worker Web (CWW) will generate most manual and batch letters. New functionality in CWW will allow workers to create manual and free format letters from predefined templates.

BACKGROUND

Letters are either sent to individuals manually by workers, or automatically through a batch process. In the past, manual letters have been generated using Mainframe, and batch letters have been generated using either Mainframe or CWW.

On March 3, 2018, all active batch letters generated by Mainframe, except benefit recovery letters, will be moved to CWW. This is part of an initiative to move all functions away from Mainframe. In addition, new functionality will allow workers to generate manual and free format letters within CWW. Letters generated using the new process will automatically be stored in the Electronic Case File (ECF) so workers will no longer need to scan the notices separately. Except for benefit recovery letters, most letters currently generated by mainframe will be made obsolete with the new tool.

POLICY

There are no policy changes associated with this Memo.

CARES

CWW will be used to send both batch and manual letters to individuals. Batch letters are automatically sent when certain triggers occur. Manual letters are created by workers and are either based on a predefined template or are free format.

BATCH LETTERS

The following table lists the batch letters that will be migrated from Mainframe to CWW on March 3, 2018.

Document Code	Available in Access?
CML4 – CHG IN ESS WKR	Yes
CMLS – SC RENEWAL FORM	No
ASLM – SC – FS/MSP INFO	No
AELI – TERM PROTECT PAYEE	Yes
AEO2 – ASSIGN PROTECT PAYEE	Yes
APLW – W2 DF SANCT. LETTER	Yes
BIL1 – W2 PAYMENT STATEMENT	Yes
NWSN – W-2 SANC NOTIFY LTR	Yes
W2FE – NEW FEP	Yes

As part of the migration, the above letters will be upgraded to current standard letter formats. Batch letters generated before March 3, 2018, will not be changed. There will be no change to worker actions to send batch letters.

MANUAL LETTERS

Workers will use CWW to create most manual and free format letters. Benefit recovery letters will continue to be created in Mainframe. Manual and free format letters created in CWW will be automatically saved as PDFs in the ECF upon completion of the nightly mail batches. Workers will not need to print or scan letters manually. The "Client Correspondence" section of the Left Navigation menu will include a link to the Manual Letter Selection page. This new page will allow workers to select a manual or free format letter from predefined templates to send to an individual.

Note: Workers will only have access to program letters associated with their worker profile. For example, only a Wisconsin Works (W-2) worker will have access to W-2 letters.
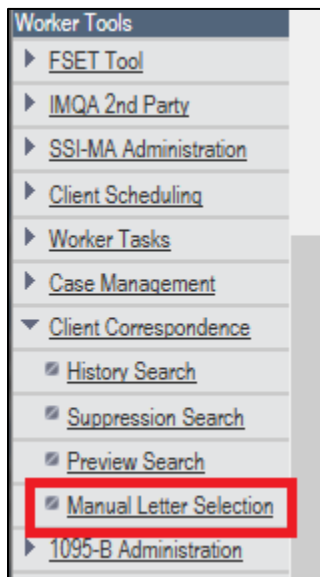
Figure 1 Left Navigation Menu With Manual Letter Selection Highlighted

The following table lists the manual letters that will be available on March 3, 2018. New letters may be added at a later date.

Program Code	Document Code	Case/PIN/RFA Based	Available in ACCESS?
FS – FoodShare	FS SMRF INC LTR – NAIR	Case	Yes
FS – FoodShare	FSET PROOF OF EXMPT – NFST	Case	Yes
FS – FoodShare	MISSED INTERVIEW – NOMI	Case	Yes
HC – Health Care	BCP PREM INFO MANUAL – NCBP	Case	Yes
HC – Health Care	RFA MIPPA LTR MANUAL – NCRA	RFA	Yes
HC – Health Care	WI WELL WOMAN LETTER – NWWW	Case	Yes
CC – Child Care	MISSED CC INTERVIEW – NCMI	Case	Yes
SC – SeniorCare	SC REQUEST FOR INFO – NSC2	Case	No
SC – SeniorCare	SC AUTHORIZED REP – NSC3	Case	No
SC – SeniorCare	SC FEE REC'D NO APP – NSC5	Case	No
SC – SeniorCare	SC FEE LATE NO PPRA – NSC6	Case	No
SC – SeniorCare	SC INCOME CORRECTION – NSC8	Case	No
SC – SeniorCare	SENIORCARE CLOSURE – NSCA	Case	No
WW – Wisconsin Works (W-2)	W-2 NON COOPERATION – NWNC	PIN	Yes

Free format letters will have several open-ended fields to allow workers to create unique letters, as the situation requires. The following table lists the free format letters that will be available on March 3, 2018. New letters may be added at a later date.

Program Code	Document Code	Case/PIN/RFA Based	Available in ACCESS?
FS – FoodShare/ HC – HealthCare	FREE FORMAT IM LTR – FFIM	Case	Yes
CC – Child Care	FREE FORMAT CC LTR – FFCC	Case	Yes
SC – SeniorCare	FREE FORMAT SC LTR – FFSC	Case	No
WW – Wisconsin Works (W-2)	FREE FRMT W2 PIN LTR – FFWP	PIN	Yes
WW – Wisconsin Works (W-2)	FREE FRMT W2 CASE LT – FFWW	Case	Yes

Each manual letter will have standardized text and customizable fields. Program contact information will be automatically entered for each manual and free format letter, based on the program associated with the letter and individual contact information based on the case, personal identification number (PIN), or request for assistance (RFA) number.

HOW TO SEND A MANUAL LETTER

Workers will create manual letters using predefined and formatted templates. Workers will select the appropriate template and insert person and case-specific details. Manual FoodShare, HealthCare, Child Care, and W-2 letters will be sent by mail or will be available on ACCESS, depending on the individual's mail preference. SeniorCare manual letters will only be sent by mail.

Figure 2 Manual Letter Selection Page – Generate a Manual Letter is Selected

Workers will use the following process to create and send a manual letter:

1. Click **Manual Letter Selection** in the Left Navigation menu to open the Manual Letter Selection page.

2. Select the **Generate a Manual Letter** radio button.

   Workers can select a program from the Program Code drop-down menu. When selecting a program, CWW will filter the options in the Letter Code drop-down menu to only show letters for that program. If workers select All Programs as the Program Code, all available letter options will be shown. Workers must select a letter from the Letter Code drop-down menu.

Figure 3 Manual Letter Selection Page – Letter Codes Available When FS - FoodShare Program Code Is Selected

   If workers access this page while processing a case, the Case/RFA number field will automatically be populated with the case number or RFA number. This number will be used to generate letter information and save the letter to the appropriate case number or RFA number in the ECF. Case-based and RFA-based letters must be associated with the respective case number or RFA number.

   PIN-based letters must be associated with an individual's PIN and either a case number or RFA number. Workers will enter the related PIN in the appropriate field. The PIN field is only available for PIN-based letters, and will be grayed out for all case-based or RFA-based letters. Only some W-2 letters will be PIN-based at this time.

3. Click **Go** to navigate to the Manual Letter Generation page.

Figure 4 Manual Letter Generation Page for the Missed Interview – NOMI Letter

4. Confirm the information in the "Manual Letter Details," "Mailing Address," and "Agency Contact Information" sections. The information will be automatically populated based on the information entered on the Manual Letter Selection page. Most of the fields will be read-only and cannot be changed.

   The recipient name and address information will be populated with either the primary person on a case or the person whose PIN was entered. The Recipient Name field can be edited for FoodShare, HealthCare, and SeniorCare letters, but will be read-only for W-2 and Child Care letters.

5. Enter information specific to the case, RFA, or PIN in the available fields in the "Additional Information" section. The available fields in this section will vary based on the option selected from the Letter Code drop-down menu on the Manual Letter Selection page.

   Each manual letter is based on a standard template with fields for individual-specific or case-specific information. The "Additional Information" section will show all fields for the selected template. Workers will complete the fields to generate the final letter. Worker entries will be added to the predefined template to create a standardized letter.

   For example, the purpose of the Missed Interview – NOMI letter is to inform the member that they missed their mandatory FoodShare interview. The "Additional Information" section will display three fields for the worker to enter the FoodShare member's name, the agency's phone number, and the interview deadline. See figure 5.

6. Select **Yes** in the "Mail Management" section to send the correspondence in the nightly mail batch.

   Note: The default will be set to Yes, and will generally not need to be changed.
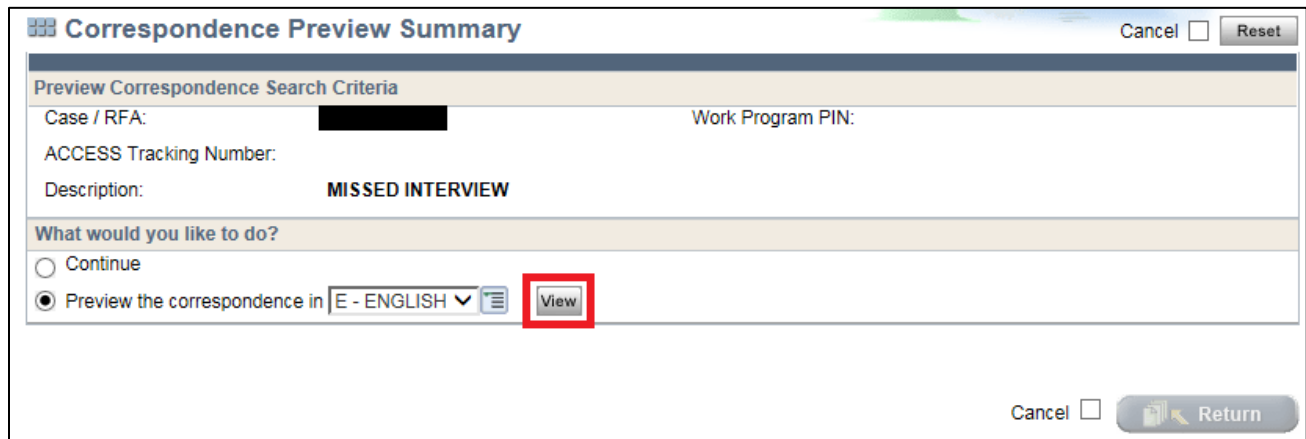
The option to select No is designed to allow workers to print the letter and hand it to the individual, or if additional documents must be sent with the letter. If workers select No, the letter will be saved as a PDF in the ECF and will not be printed in the nightly mail batch. For example, workers will select Yes for the Missed Interview – NOMI letter because all information is included and the member is not in the office to directly receive the letter. However, the FS SMRF INC LTR – NAIR letter must be sent with the incomplete SMRF form. Therefore, workers will select No, print the letter manually, and mail both the letter and form together.

Figure 5 Correspondence Preview Summary Page – Preview The Correspondence Selected

7. Click **Next** to navigate to the Correspondence Preview Summary page. The letter will be saved to the ECF and added to the nightly mail batch if Yes was selected in the "Mail Management" section.

Figure 6 Correspondence Preview Summary Page – Preview The Correspondence Selected

8. Click **View** to preview the letter for errors. If there are errors in the letter, workers will be able to suppress the letter through the end of the day it was created.

MILWAUKEE
MILWAUKEE ENROLLMENT SERVICES
PO BOX 05676
MILWAUKEE WI 53717

Mailing Date: **01/26/2018**

JOHN DOE
Mailing Address
City, State Zip

State of Wisconsin

Case #:

Milwaukee Enrollment Services
Worker: ▮▮▮▮▮▮
Phone #: ▮▮▮▮▮▮
Fax #: ▮▮▮▮▮▮
Use fax # to send verifications.

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 1-888-947-6583. These services are free.

Notice of Missed Interview

Dear JOHN DOE,

You missed the appointment for your interview to complete your FoodShare application. If you still wish to apply for FoodShare, contact your local agency at (555) 555-5555 x5555 to reschedule this appointment. You have until Feb. 26, 2018 to complete the interview.

Case: Date: 1/26/2018   Page 1 of 1

Figure 7 Example Of Letter Created Using The Missed Interview – NOMI Template

9. Select **Continue** and click **Return** to return to the Manual Letter Generation page.

Figure 8 Correspondence Preview Summary Page – Continue Selected

HOW TO SEND A FREE FORMAT LETTER

Free format letters will be used for situations not covered by any of the manual letter templates. The free format letter template uses the same header and footer as the manual letter templates but does not have any predefined message. Workers will create a unique message using the available fields. FoodShare, HealthCare, Child Care, and W-2 free format letters will either be sent by mail or will be available on ACCESS, depending on the individual's mail preference. SeniorCare free format letters will only be sent by mail.

Figure 9 Manual Letter Selection Page – Generate a Free Format Letter Selected

Workers will use the following process to create and send a free format letter:

1. Click **Manual Letter Selection** in the Left Navigation menu to open the Manual Letter Selection page.

2. Select the **Generate a Free Format Letter** radio button and complete the remaining fields.

    Workers must select a letter from the Letter Code drop-down menu. Workers can select a program from the Program Code drop-down menu in order to filter the options in the Letter Code drop-down

menu to only show letters for that program. If workers select All Programs as the Program Code, all available letter options will be shown.

Figure 10 Manual Letter Selection Page – Letter Codes Available With All - All Programs Program Code Selected

Case-based and RFA-based letters must be associated with a case number or RFA number. If workers access this page while processing a case, the Case/RFA number field will automatically be populated with the case number or RFA number. The number will be used to generate letter information and save the letter to the appropriate case number or RFA number in the ECF.

PIN-based letters must be associated with an individual's PIN as well as ase number or RFA number. Workers will enter the related PIN in the appropriate field. The PIN field is only available for PIN-based letters, and will be grayed out for all case-based or RFA-based letters. Only some W-2 letters will be PIN-based at this time.

3. Click **Go** to navigate to the Free Format Letter Generation page.

Figure 11 Free Format Letter Generation Page With Example Letter Text.
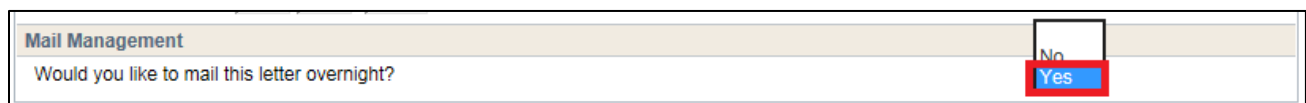
4. Confirm information in the "Free Format Letter Details," "Mailing Address," and "Agency Contact Information" sections. The information will be automatically populated based on the information entered on the Manual Letter Selection page. Most of the fields will be read-only and cannot be changed.

The Recipient Name field will be populated either with the primary person on a case or the person whose PIN was entered. The Recipient Name field can be edited for FoodShare, HealthCare, and SeniorCare letters, but will be read-only for W-2 and Child Care letters.

5. Enter the letter contents in the "Additional Information" section. Free Format letters will have three paragraph fields and five bulleted list fields. Workers must enter information into the Intro Paragraph field, but all other fields are optional. Only the fields with text will show on the actual letter.

6. Select **Yes** in the "Mail Management" section to send the correspondence in the nightly mail batch.

    Note: The default will be set to Yes for all workers, and will generally not need to be changed.
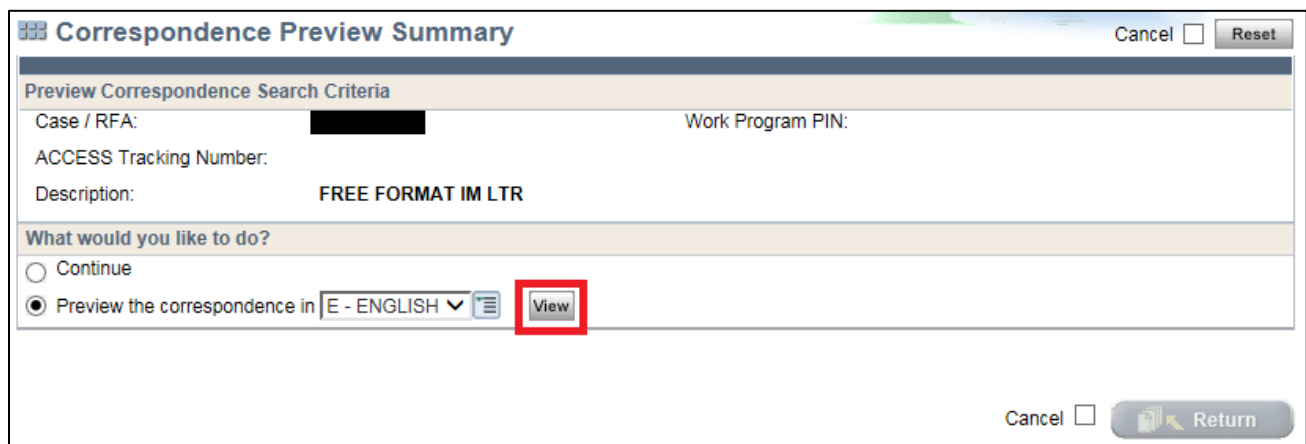
    The selection of No is designed to allow workers to print the letter and hand it to the individual. If the worker selects No, the letter will be saved as a PDF in the ECF and will not be printed in the nightly mail batch.

Figure 12 Mail Management Section With Yes Selected In Drop-Down Menu

7. Click **Next** to navigate to the Correspondence Preview Summary page. The letter will be saved to the ECF and added to the nightly mail batch if Yes was selected in the "Mail Management" section.

Figure 13 Correspondence Preview Summary Page - Preview the Correspondence selected

8. Click **View** to preview the letter for errors. If there are errors in the letter, workers will be able to suppress the letter through the end of the day it was created.
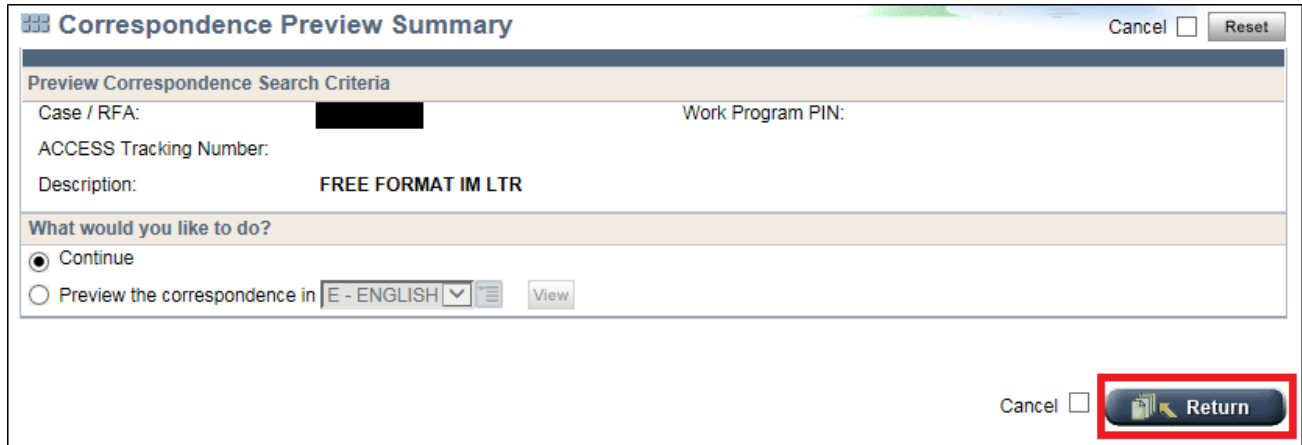
CDPU
CENTRALIZED DOCUMENT PROCESSING UNIT
PO BOX 5234
JANESVILLE WI 53547 5234

Mailing Date: 01/15/2018

Mailing Address
City, State, Zip

State of Wisconsin

Case #:

Moraine Lakes Consortium
Worker: ▊▊▊▊▊▊
Fax #: ▊▊▊▊▊▊
Use fax # to send proof.

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 1-888-947-6583. These services are free.

Please send proof of historical wage information by 1/30/2018 to maintain your benefits.

Examples include:

- Pay stubs
- W-2
- Employment details

Contact agency if any questions

Case: Date: 1/15/2018   Page 1 of 1

Figure 14 Example of Letter Created Using The FREE FORMAT IM LTR Template

9. Select **Continue** and click **Return** to return to the Free Format Letter Generation page.

Figure 15 Correspondence Preview Summary Page – Continue Selected

CONTACTS

BEPS CARES Information and Problem Resolution Center

For Child Care policy questions outside of Milwaukee County: Bureau of Regional Operations (BRO), Child Care Coordinators at https://dcf.wisconsin.gov/files/regionaloperations/pdf/bro-contacts.pdf

For Child Care CARES/CWW, CSAW, and CCPI IT systems processing questions statewide and policy questions in Milwaukee County: Child Care Help Desk at childcare@wisconsin.gov or (608) 264-1657

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

DHS/DMS/BEPS/TH
DCF/DECE/BELP
DCF/DFES/BWF