

DEPARTMENT OF CHILDREN  
AND FAMILIES  
Emilie Amundson, Secretary Designee  
201 East Washington Avenue, Room G200  
P.O. Box 8916  
Madison, WI 53708-8916  
Telephone: 608-422-7000  
Fax: 608-266-6836  
www.dcf.wisconsin.gov



State of Wisconsin  
Governor Tony Evers



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

<b>BWF OPERATIONS MEMO</b>							
No:	19-02						
DATE:	02/19/2019						
W-2	<input checked="" type="checkbox"/>	EA	<input type="checkbox"/>	CF	<input type="checkbox"/>	JAL	<input type="checkbox"/>
RAP	<input type="checkbox"/>	TMJ	<input type="checkbox"/>	TJ	<input type="checkbox"/>	Other EP	<input type="checkbox"/>

**SUBJECT: *Implementation of Wisconsin Work Programs System – Updates to W-2 Assessment Policies, Informal Assessment Enhancements, and the Discontinuation of the Barrier Screening Tool Web Application***

**CROSS REFERENCE:** [Administrator's Memo 19-02](#)  
[Operations Memos 19-01](#) and [19-04](#)  
[W-2 Manual Chapters 2, 5, and 14](#)

**EFFECTIVE DATE:** February 23, 2019

**PURPOSE**

The purpose of this Operations Memo is to provide information and guidance to Wisconsin Works (W-2) agencies in preparation for Phase 1 implementation of the Wisconsin Work Programs (WWP) System. More specifically, this memo:

1. Communicates W-2 policy changes to reflect the discontinuation of the Barrier Screening Tool (BST) web-based application;
2. Announces new policy to support Informal Assessment processes to ensure that W-2 workers have the information needed to identify potential participant barriers and determine appropriate services and referrals to support full program engagement; and
3. Describes the systems changes associated with the discontinuation of the BST web-based application.

## **BACKGROUND**

### PHASE 1 WWP IMPLEMENTATION

In the fall of 2016, the Division of Family and Economic Security (DFES) kicked off a multi-year project to modernize and upgrade the mainframe legacy system known as the Client Assistance for Re-employment and Economic Support System (CARES) Work Programs Subsystem. The goal of the project, Work Programs and Analytics System (WPASS), is to build a web-based system that supports work programs case management, data collection and availability, and evaluation. The application is called Wisconsin Work Programs (WWP). Phase 1 implementation of WWP will modernize data collection for a portion of the work program case management functions currently in CARES mainframe. Programs that are impacted by this project include Wisconsin Works (W-2), Learnfare, Children First (CF), Transitional Jobs (TJ), and Transform Milwaukee Jobs (TMJ).

Implementation of Phase 1 of WWP is scheduled for the weekend of February 23, 2019. The functionality that will be modernized in Phase 1 includes:

1. Clearance, Client Registration, and Request for Assistance processes for CF, TJ, and TMJ;
2. Eligibility determination for TJ and TMJ;
3. Enrollment for W-2, Learnfare, CF, TJ, and TMJ; and
4. Informal Assessment for W-2, CF, TJ, and TMJ.

After implementation, workers will perform all functions described above using the WWP online application.

In addition, several new system tools will be unveiled as part of Phase 1 that will help workers better manage data collection for services needed by the participant, and track information about the providers of services and the referrals initiated by the worker. Actions needed by both the participant and the worker will be documented and tracked in WWP.

Future phases of the project will modernize remaining CARES Work Program subsystem functionality. Until all functionality is modernized, workers will navigate between CARES mainframe, CARES Worker Web (CWW), and WWP to perform needed case management functions.

### DISCONTINUATION OF THE BARRIER SCREENING TOOL

The Barrier Screening Tool (BST) was implemented in 2003 and, eventually, the BST web-based application was created. The BST screened for the potential presence or risk of a personal barrier to normal functioning in an employment setting. Gathering this information helps workers meet the needs of W-2 participants, identifies other supportive services for the participant, and ensures individualized case management and effective activity assignment. Due to the high decline rate of the BST, information about medical, emotional, or learning needs preventing employment or participation in W-2 activities has not been documented. The Bureau of Working Families (BWF) determined that while creating WWP, incorporating the information gathered during the BST into the WWP Informal Assessment Driver Flow was an alternative approach necessary to ensure that W-2 workers have the information needed to identify potential barriers and determine appropriate services and referrals to support full program engagement.

### NEW WWP INFORMAL ASSESSMENT DRIVER FLOW

The new WWP Informal Assessment Driver Flow supports an enhanced informal assessment process and collection of participant data to inform case management decision-making. A Participant Barriers page in the WWP Informal Assessment Driver Flow incorporates participant barrier questions and a domestic violence screening previously addressed using the BST at W-2 application. This system enhancement and corresponding policy updates will obsolete the need to offer the stand-alone BST and support the discontinuation of the BST web-based application.

This memo outlines policy changes to support the enhanced informal assessment process. See [Operations Memo 19-04: Implementation of Wisconsin Work Programs Systems – Updates to W-2 Accommodations Policies](#) for information on updates to policies related to providing accommodations and [Operations Memo 19-01: Migration of Participant Data to Wisconsin Work Programs](#) for information on the WWP conversion process.

### **OBSOLETE BST POLICY**

BWF is discontinuing the BST web-based application as part of the WWP modernization effort effective February 23, 2019. The W-2 Manual will be updated to remove language related to the BST and BST-specific forms, and make updates to policy to reflect that barrier screening will be completed as part of the informal assessment process in WWP.

W-2 Manual, Section 5.4 Barrier Screening Tool will be obsolete.

### **INFORMAL ASSESSMENT POLICY UPDATES AND ENHANCEMENTS**

The W-2 Informal Assessment policy updates and policy clarifications implemented to support the enhanced assessment process, including participant barriers questions and domestic violence screening, are summarized below. The W-2 Manual sections are attached with all policy changes incorporated. Policy that was removed is struck through and policy that has been added is underlined. New sections will be clearly denoted.

#### WWP INFORMAL ASSESSMENT [W-2 MANUAL 5.2.3 (NEW)]

##### Current Policy

The W-2 Manual provides basic instructions for completing the BST, but does not include specific instructions for administering the CARES Work Program Assessment Driver Flow.

##### New Policy

Because BWF has incorporated the BST questions in WWP, W-2 Manual section 5.2.3 is created to provide specific instruction on completing the WWP Informal Assessment Driver Flow.

[See attached new W-2 Manual Section 5.2.3](#)

*PARTICIPANT BARRIERS QUESTIONS [W-2 MANUAL 5.2.3.1 (NEW)]*Current Policy

The W-2 BST is used to identify the potential presence or risk of a personal barrier to normal functioning in an employment setting. The BST is voluntary and applicants/participants may decline part or all of the BST without risk of sanction or case closure.

Updated Policy

BWF created section 5.2.3.1 to provide specific instruction on using the WWP Informal Assessment Participant Barriers questions to collect information about the applicant or participant's health and personal life. The WWP Informal Assessment - Participant Barriers Page consists of five sections that incorporate elements of the BST:

1. Physical Health
2. Mental Health
3. Alcohol and Other Drug Abuse (AODA)
4. Cognitive and Learning Needs
5. Domestic Abuse Screen

The W-2 worker must ask each of the Participant Barriers questions as part of the required WWP Informal Assessment. If the applicant or participant indicates that any of the issues identified on the Participant Barriers page may impact his or her ability to participate in W-2, the FEP must refer the individual for formal assessment.

Applicants/participants may decline any or all of the Participant Barriers questions without risk of sanction or case closure. If the participant declines to answer a question, the worker must indicate this on the WWP Participant Barrier page by checking the corresponding *refused* box and move on to the next question.

[See attached new W-2 Manual Section 5.2.3.1](#)

*TIMING OF THE WWP INFORMAL ASSESSMENT [W-2 MANUAL 5.2.3.2 (NEW)]*Current Policy

The CARES Work Program Assessment Driver Flow is required to be completed at initial W-2 placement and must be redone at each placement change.

Updated Policy

W-2 workers must complete the WWP Informal Assessment Driver Flow at initial W-2 placement and redone at each placement change. Because the informal assessment process in WWP continues to serve as the primary framework for critical conversations about strengths, potential barriers, and service needs, this driver flow must also be completed at additional points throughout ongoing case management including:

- When the individual requests to have the WWP Informal Assessment questions reviewed; or

- When the FEP is considering denying an initial extension for a 24-month placement time limit or the 60-month state lifetime limit and the WWP Informal Assessment has not been completed or updated within 12 calendar months prior to the participant's 24th or 60th month in an ongoing case. (See [2.10.6.5](#)).

The FEP may also choose to complete the WWP Informal Assessment when there is reason to believe that reviewing the questions may help initiate conversation about a potential barrier.

BWF created section 5.2.3.2 to highlight required timing for completing the WWP Informal Assessment Driver Flow.

[See attached new W-2 Manual Section 5.2.3.2](#)

### *WWP INFORMAL ASSESSMENT WITH TWO-PARENT W-2 HOUSEHOLDS [W-2 MANUAL 5.2.3.3 (NEW) AND 14.2.1]*

#### Current Policy

The FEP must complete an informal assessment with each parent in a W-2 two-parent household. The FEP must also offer each parent the BST at application and at other times as required by the BST policy. Unless both parents request the BST be administered to them together, the designated screener must administer the BST to each parent separately.

#### Updated Policy

If the W-2 group is a two-parent household, the WWP Informal Assessment must be completed with each parent separately, unless both parents request to have the other parent present.

BWF created section 5.2.3.3 to provide specific instruction for completing the WWP Informal Assessment with each parent in a W-2 two-parent household.

[See attached new W-2 Manual Section 5.2.3.3.](#)  
[See attached updated W-2 Manual Section 14.2.1](#)

### *INFORMAL ASSESSMENT WITH CHILDREN PRESENT [W-2 MANUAL 5.2.3.4 (NEW)]*

#### Current Policy

When offering the BST, the W-2 agency must make the individual aware of child care options that may be used while completing the BST. If requested, the W-2 agency must assist with making the child care arrangements before completing the screening.

#### Updated Policy

Due to the sensitive nature of new informal assessment questions intended to gather information about potential barriers to employment or program participation, the W-2 agency must make the individual aware of child care options that may be used while completing the driver flow. If requested, the W-2 agency should assist with connecting the participant to these child care options before completing the WWP Informal Assessment.

BWF created section 5.2.3.4 to provide specific instruction on completing the WWP Informal Assessment with children present.

[See attached new W-2 Manual Section 5.2.3.4](#)

#### WWP INFORMAL ASSESSMENT NOTES AND DETAILS [W-2 MANUAL 5.2.3.5 (NEW)]

##### Current Policy

The W-2 Manual provides instruction for recording Case level comments in CWW and PIN level comments in the CARES mainframe. Confidential information must never be entered in either type of Case Comment.

##### New Policy

The W-2 worker must never enter confidential information in the Notes and Details fields of the WWP Informal Assessment, with the exception of the Participant Barriers and Family Barriers pages. There is no change to current policy for entering confidential information in Case Comments. (See [4.3.3](#))

- **NOTE:** WWP Participant Barriers and Family Barriers pages may be directly accessed only by the FEP and FEP Supervisor assigned to the W-2 case. The Resource Specialist may request access to these pages in WWP if necessary to complete their case management responsibilities. The W-2 Quality Control staff and other staff who are assigned to the W-2 Case Management Supervisor role in WWP may request to view these pages in WWP as necessary.

BWF created section 5.2.3.5 to provide specific instruction on using the WWP Informal Assessment Notes and Details fields, as these new system features are intended to allow workers to record additional relevant information on each page of the driver flow.

[See attached new W-2 Manual Section 5.2.3.5](#)

#### DOMESTIC ABUSE SCREENING [W-2 MANUAL 5.6 (RENUMBERED)]

##### Current Policy

The Domestic Abuse Screen section of the BST helps the FEP and applicant or participant determine if referrals for a domestic abuse assessment and services are needed. The Domestic Abuse Screen must be completed with all new applicants and participants who agree to complete the BST. If an applicant/participant voluntarily discloses that he or she is or has been a victim of domestic abuse or is at further risk of domestic abuse, he or she is not required to be screened.

##### New Policy

BWF renumbered section 5.6 to include instructions for completing the Domestic Abuse Screen in the WWP Informal Assessment. Section 5.6.1 provides information about administering the Domestic Abuse Screen previously captured in W-2 BST policy and the former BST directions. When completing the WWP Informal Assessment, the W-2 worker must only initiate the

Domestic Abuse Screen if it is safe. There is no change to current policy waiving the screening requirement for applicants/participants who voluntarily disclose domestic abuse.

[See attached new W-2 Manual Section 5.6.1](#)

[See attached updated and renumbered W-2 Manual Section 5.6.2 \(Formerly 5.6.1\)](#)

[See attached renumbered W-2 Manual Section 5.6.3 \(Formerly 5.6.2\)](#)

### ***ADDITIONAL POLICY UPDATES RELATED TO W-2 ASSESSMENT***

Additional W-2 Assessment policy updates and policy clarifications are summarized below. The W-2 Manual sections are attached with all policy changes incorporated.

#### ***TIME LIMIT DECISIONS AND ASSESSMENT [W-2 MANUAL 2.10.6.5]***

##### **Current Policy**

The FEP must offer the BST if an initial 24-month placement time limit or 60-month state lifetime limit extension is going to be denied and the BST has not been completed or declined within 12 calendar months prior to the participant's 24th or 60th month. The FEP cannot deny a time limit extension until the BST is offered to the participant.

##### **Updated Policy**

The FEP must complete the WWP Informal Assessment Driver Flow if an initial 24-month placement time limit or 60-month state lifetime limit extension is going to be denied and the WWP Informal Assessment Driver Flow has not been completed within 12 calendar months prior to the participant's 24th or 60th month. The FEP cannot deny a time limit extension until the WWP Informal Assessment Driver Flow is completed.

[See attached updated W-2 Manual Section 2.10.6.5](#)

#### ***WHEN TO OFFER FORMAL ASSESSMENT [W-2 MANUAL 5.5.1.1]***

##### **Current Policy**

A formal assessment must be offered within 30 calendar days when the results of Informal Assessment and/or the BST indicate a need for further evaluation for identification of a disability or other barrier to participation in the W-2 program or employment. The formal assessment must be scheduled and documented in CARES within 30 calendar days after the BST is completed.

##### **Updated Policy**

The FEP must offer a referral for formal assessment when the WWP Informal Assessment indicates a need for further evaluation for identification of a disability or other barrier. The formal assessment activity must be scheduled and documented in CARES and the WWP Participant Barriers or Family Barriers pages within 30 calendar days of the referral date.

[See attached updated W-2 Manual Section 5.5.1.1](#)

ADDITIONAL CLARIFICATIONS AND UPDATES TO W-2 ASSESSMENT POLICY

BWF has made additional revisions to W-2 Assessment Policy to further clarify expectations for completing assessments.

Section	Title	Description of Updates
5.1.1	Assessment at Application	Reorganized and made updates for clearer distinction between assessment at application with new applicants vs. applicants who have previously participated in the W-2 program.
5.1.1.1	Assessment at Application with Former W-2 Participants	Created new subsection to highlight specific instruction on obtaining prior assessment information at application previously captured in 5.1.1 and other sections of the W-2 manual.
5.1.1.2	Referral for Assessment at Application	Created new subsection to highlight instruction on referrals for assessment at application previously captured in 5.1.1 and other sections of the W-2 manual.
5.1.2	Assessment as Part of Ongoing Case Management	Updated language to create a distinction between informal assessment and other types of assessment that may be completed as part of ongoing case management.
5.2.2	Informal Assessment Inventory	Revised the informal assessment inventory to highlight the specific information collected via WWP. Additional information must be gathered as part of the informal assessment process.
5.5.1.1	When to Use a Formal Assessment	Revised language to ensure that the instructions for formal assessments for participants placed in a W-2 T align with the W-2 T formal assessment requirements in 7.4.2.1.
5.5.3	Necessary elements	Added 'recommended reassessment date' as a necessary element of a formal assessment to align with policy at 5.5.1.1 and formal assessment forms.

**FORMS**

The following forms and publications have been updated to reflect the implementation of the WWP Informal Assessment and elimination of the BST:

Form or Publication	Description of Updates
<a href="#">Notice of Noncooperation with W-2 Requirements (DCF-F-2723-E)</a>	Modifies the "DO YOU NEED AN ACCOMMODATION?" section to reference the Informal Assessment in lieu of the BST. Includes language to provide an explanation of the term

Form or Publication	Description of Updates
	"accommodation" previously captured on the W-2 Barrier Screening Tool Agreement.
<a href="#">W-2 Participation Agreement (DCF-F-DWSP10755)</a>	Includes new language to incorporate information related to privacy and confidentiality previously captured on the W-2 Barrier Screening Tool Agreement.
<a href="#">W-2 Agency Time Limit Extension Approval Record (DCF-F-5214)</a>	Modifies question 3 from Part III to require that the W-2 agency indicate whether the WWP Informal Assessment was completed and submitted in the past 12 months as well as the date the WWP Informal Assessment was last submitted.
<a href="#">W-2 Agency Time Limit Extension Denial Record (DCF-F-5215)</a>	Modifies question 4 from Part III to require that the W-2 agency indicate whether the WWP Informal Assessment was completed and submitted in the past 12 months as well as the date the WWP Informal Assessment was last submitted.

The W-2 Barrier Screening Tool Agreement (DCF-F-DWSP13578) and Barrier Screening Tool (DCF-F-DWSP13577) will be obsolete.

### ***BST WEB APPLICATION***

Concurrent with the implementation of Phase 1 of the WWP system, the BST web application will be discontinued. Workers will no longer be able to log into the BST web application or view participant BST screening results.

### ***CARES CHANGES***

The CARES Work Programs system currently displays the BST status for each W-2 participant (i.e., Complete, Partially Complete, or Declined) and calculates W-2 payment reductions for W-2 participants based on the BST status.

The following changes in CARES will be implemented when the BST web application is discontinued and W-2 workers begin recording assessment-related data in WWP:

WPRU

Currently, CARES screen 'WPRU' displays a BST status if a participant has been screened. Statuses displayed in the *Barrier Screening Status* field are CP – Complete, DR – Declined to Respond, or PC – Partially Completed. On the date that BST web application is discontinued, WPRU will no longer display data for *BST Status*, *Last Updated Date*, *Main User* or *Created Worker* fields.

```
WPRU          ASSESSMENT - EMPLOYMENT & SCREENING RESULTS    08/05/15 14:40
                                                    XCTB4B S SINGH
PIN: 1234567890   OFFICE: 1581   CTY/TRIBE: 40   CASE MANAGER: XRS105
NAME: KNIGHT      ABIGALE       C
LAST ASSESSMENT UPDATE: 11 08 2013           UPDATED DATE: 11 08 2013

IS PARTICIPANT READY FOR UNSUBSIDIZED EMPLOYMENT (Y/N)?: Y
SUMMARY OF DECISION: MS. KNIGHT IS CURRENTLY EMPLOYED. _____
_____
_____

BARRIER SCREENING STATUS:
LAST UPDATED DATE      :
MAIN USER              :
CREATED WORKER         :

PF13 WPED  PF14 WPAW  PF15 WPJR
NEXT TRAN: ____  PARS: 1234567890 _____ MORE...
```

WPNH

Currently, on CARES screen 'WPNH' where non-participation is recorded, the *Incomplete BST Indicator* field displays a Y-Yes when there is a BST requirement for the participant that has not been completed or a N – No when either the BST is completed or declined. When a Y-Yes displays, the non-participation being recorded will not be applied to the W-2 payment.

On the date that the BST web application is discontinued, the status of the BST will no longer be a factor in determining payment reductions for W-2. If the participant is in a W-2 placement, CARES will display a N-No in the *Incomplete BST Indicator* field. Otherwise, the field will remain blank.

- **NOTE:** The *Ongoing Assessment Indicator* functionality, also found on WPNH, will not be affected by the BST system changes. If the *Ongoing Assessment Indicator* displays a Y-Yes, it indicates that a formal assessment activity is assigned in CARES. No sanctions due to non-participation will be applied to the participant's W-2 payment until the formal assessment activity is ended.

WPNH	NON-PARTICIPATION HISTORY	08/06/15 09:59 XCTB4B S SINGH
PIN: 0500555555 KINGHT ABIGALE		
CTY/TRIBE: 40 REGION: 05 OFFICE: 1581 NEXT PIN: _____		
NON-PART DATE: __ __ __ THRU __ __ __ NON-PART OFFICE:		
COMP/STAT: __ ACTIVITY CODE: __		
NP TYPE: __		
NP STATED RSN: __		
NP HOURS: __ GC : _ GC HOURS: __		
GC RSN: __		
INCOMPLETE BST IND: ONGOING ASSESSMENT IND:		
PRIMARY COMMENT: _____		
ADDITIONAL COMMENT: _____		
_____		
_____		
_____		
PF19 WPNP PF14 COPY TO SAME PIN PF15 COPY TO NEW PIN PF13 WPNH		
NEXT TRAN: _____ PARMS: 0123456789 _____		

WPNP

Non-participation recorded on CARES screen 'WPNH' displays as history on 'WPNP'. On the date that the BST web application is discontinued, if the participant is in a W-2 placement, CARES will display N-No in the *Incomplete BST Indicator* field. Otherwise, the field will remain blank.

NON-PARTICIPATION		NON-PART							GOOD CAUSE		INC	ONG	
BEGIN DATE	END DATE	ACT CD	COMP STAT	TYP	RSN	HRS	RSN	HRS	IND	BST IND	ASMT IND	SANC IND	DEL
02 15 2011	02 15 2011	WE	AB	NN	005					N	N	N	
02 14 2011	02 14 2011	WE	AB	NN	005					N	N	N	
02 11 2011	02 11 2011	WE	AB	NN	005					N	N	N	
12 30 2010	12 30 2010	WE	AB	NN	005		CC	005		N	N	Y	
12 29 2010	12 29 2010	WE	AB	NN	005		CC	005		N	N	Y	
12 28 2010	12 28 2010	WE	AB	NN	005		CC	005		N	N	Y	
12 23 2010	12 23 2010	WE	AB	NN	005		CC	005		N	N	Y	
12 22 2010	12 22 2010	WE	AB	NN	005		CC	005		N	N	Y	

PF13 WPNH PF14 WPMA PF15 UNDELETE ON WPNP PAGE: 1  
 NEXT TRAN: \_\_\_\_\_ PARMS: 0123456789 MORE...

ALERTS, LETTERS, AND NOTICES

CARES alerts related to the BST are no longer necessary and will be disabled.

In addition, information related to the BST will be removed from the following CARES-generated participant notices and letters: AELI, AELR, AEO2, APLW, BIL1, ELIG, IPVI-4, NWNC, NWSN, W2FE, W2RP, WCL1-4, and WXT1-4.

The “DO YOU NEED AN ACCOMMODATION?” section included on each of the impacted notices will be updated to reference the Informal Assessment in lieu of the BST. This section now includes language to provide an explanation of the term “accommodation” previously captured on the W-2 Barrier Screening Tool Agreement form. This same language is also captured on the [Notice of Noncooperation with W-2 Requirements \(DCF-F-2723-E\)](#). See attached updated form.

**REPORTS**

All reports related to the BST will be obsolete effective February 23, 2019.

**TRAINING**

The Partner Training Team (PTT) will update any relevant trainings based on these policy changes and clarifications.

**AGENCY ACTION**

W-2 agencies must discuss the policy changes and updated forms with staff. W-2 agencies must also update any relevant local agency procedures.

**ATTACHMENTS**

[W-2 Manual, Chapter 5](#)

[W-2 Manual, Sections 2.10.6.5 and 14.2.1](#)

[DCF-F-2723-E Notice of Noncooperation with W-2 Requirements](#)

[DCF-F-5214 W-2 Agency Time Limit Extension Approval Record](#)

[DCF-F-5215 W-2 Agency Time Limit Extension Denial Record](#)

[DCF-F-DWSP10755 W-2 Participation Agreement](#)

**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 WWP or CARES Functionality Questions: W-2 Help Desk

DCF/DFES/BWF/LW