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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

**BWF OPERATIONS MEMO**

No: 19-09 (Amended)  
DATE: 03/25/2019 05/22/2019

W-2 ☒ EA ☐ CF ☐ JAL ☒

RAP ☐ TMJ ☐ TJ ☐ Other EP ☐

**SUBJECT: Updates to the Job Access Loan (JAL) W-2 Office in CARES**

**CROSS REFERENCE:** [Operations Memo 11-67](#)  
[Operations Memo 14-04](#)

**EFFECTIVE DATE:** March 31, 2019

**PURPOSE**

The purpose of this memo is to announce updates to CARES to change the W-2 office that creates, tracks, and issues Job Access Loan (JAL) checks from the Work Programs (WP) Office to the Eligibility Office. In addition, this memo describes the associated process changes for workers creating JAL claims and for W-2 Security Officers who complete the [Job Access Loan, W-2 Auxiliary Payment and/or Performance Outcome Payment Claim Approval Designation \(DCF-F-2582-E\)](#) form.

**BACKGROUND**

When a worker creates a JAL in CARES, the claim connects to a W-2 office for reference and tracking of claims and issued checks. As part of the JAL check issuance process, a CARES user with appropriate permissions approves JAL payments. The W-2 Security Officer designates approver permissions for CARES users for JAL payments, W-2 Auxiliary payments, and Performance Outcome Payment (POP) claims by completing form [DCF-F-2582-E](#) and submitting it to the DCF W-2 CARES Help Desk.

## **POLICY**

There are no policy changes associated with this memo.

## **JAL APPLICATION PROCESS**

### OLD PROCESS

Currently, all JAL claims and issued checks connect to the WP Office in CARES. As described in [Operations Memo \(OM\) 11-67](#), there is an additional step for the JAL application process for applicants who are not open for W-2 eligibility. OM 11-67 instructs workers to complete a referral to CARES WP when processing a JAL claim for an applicant assigned to the Target Type “WW J” on the CARES Worker Web (CWW) **W-2 Request** page. This step was necessary to connect the applicant to the W-2 WP Office for assistance groups not already open for W-2 eligibility. Subsequently, [OM 14-04](#) introduced JALs for noncustodial parents, and the process to request a JAL using **Target Type “WW L”** on the CWW **W-2 Request** page if a noncustodial parent is not already open in a W-2 CMN placement. The remaining process described is identical to that of a custodial parent.

The step of referring JAL applicants to CARES WP who are not open for W-2 eligibility will become obsolete with the updates to CARES as detailed below. The remainder of OM 11-67 and OM 14-04 remain in effect.

### NEW PROCESS

In an effort to simplify the JAL process, effective March 31, 2019, all JAL claims and issued checks will connect to the W-2 Eligibility Office instead of the W-2 WP Office. With this update, workers no longer need to process a referral to CARES WP for an applicant assigned to the Target Type “WW J” or “WW L” on the CWW **W-2 Request** page.

## **CARES**

Previously, the WP Office tracked the JAL claims and the approved JAL checks in CARES. Effective March 31, 2019, the W-2 Eligibility Office will track all JAL claims, denials, and issued JAL checks in CARES. The office listed on the following CARES screens will now be the Eligibility Office instead of the WP Office:

- BVJL: Job Access Loan Information;
- BIAJ: JAL Request Approval;
- BVCI: Claims for an Individual; and
- IQAF: W-2 Issuance History.

Any outstanding JAL claims connected to the WP Office will not migrate over with the updates to CARES as described in this OM. W-2 agencies should use their judgement on new JAL applications received prior to the system update, on whether or not they are able to complete the application process (including the approval decision) prior to close of business on March 29. W-2 agencies will need to re-enter the JAL claim on BVJL after the updates to CARES have been completed on March 31, 2019.

DCF will update CARES Screen BIJA: JAL Authorized Approvers to the appropriate W-2 Eligibility Office with existing CARES users with JAL approver permissions.

## **FORMS**

The [Job Access Loan, W-2 Auxiliary Payment and/or Performance Outcome Payment Claim Approval Designation \(DCF-F-2582-E\)](#) form has been updated to include a field to enter the W-2 Eligibility Office Number. W-2 Security Officers should indicate the W-2 Eligibility Office Number for the CARES user when granting or removing JAL approver permissions.

[See attached the updated form.](#)

## **TRAINING**

The Partner Training Team will update any relevant trainings based on these updates.

## **AGENCY ACTION**

By Friday, March 29, 2019, W-2 agencies must ensure there are no pending JAL claims or approval decisions in CARES, as they will not migrate over. JAL claims that are in Intake (I) or Application (A) status on BVJL, and Pending (P) or Hold (H) status on BIAJ at close of business on March 29, 2019 will need to be re-entered in CARES on or after April 1, 2019 after the system updates occur.

W-2 agencies must also familiarize staff with the CARES system updates and update any relevant standard operating procedures.

## **ATTACHMENT**

[Job Access Loan, W-2 Auxiliary Payment and/or Performance Outcome Payment Claim Approval Designation \(Form DCF-F-2582-E\)](#)

## **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 and WWP Functionality Questions: W-2 Help Desk

DCF/DFES/BWF/AP