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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: 19-11

DATE: 04/12/2019

W-2 ☒ EA ☐ CF ☐ JAL ☐

RAP ☐ TMJ ☐ TJ ☐ Other EP ☐

SUBJECT: *Changes to Functionality of CARES Screen WPFN and Introduction of Replacement WebI Report*

CROSS REFERENCE: None

EFFECTIVE DATE: Immediately

PURPOSE

The purpose of this memo is to:

1. Describe the changes in the functionality of CARES screen WPFN: Request To "Find" Information; and
2. Introduce the Monitoring Report 02: Dynamic Search Tool – WPFN Replacement Report in Business Objects Web Intelligence (WebI).

BACKGROUND

W-2 and other work programs staff often need to query data to aid in program administration. This includes searching for participants on their caseload based on varying criteria, such as current placement type or activities. Historically, users have been able to access this information using CARES screen WPFN to create lists of participants based on the specified search criteria.

With the implementation of Wisconsin Work Programs (WWP), WPFN will no longer create a separate report for every possible combination of search criteria. The Bureau of Working Families (BWF) created a dynamic and interactive WebI report to provide data previously

obtained from WPFN, which includes increased functionality. This new report allows users to search for both summary and detailed information such as demographic data, case status, activities, vehicle data, confidentiality, and eligibility review data.

POLICY

There are no policy changes associated with this memo.

CARES

BWF has limited the functionality of WPFN as part of the effort to modernize systems used in the administration of W-2 and other work programs. Users can no longer use the Case Manager ID field on WPFN to perform searches for participants on their caseload. In addition, the following fields on WPFN are now disabled:

- ZIP Code
- Language Code
- Education Level
- Vehicle Availability
- Drivers' License (Y/N)
- Drivers' License Type
- Disability Status
- Refugee Flag
- Veteran Flag
- Tribal Member Flag
- High School Graduation Status

NEW REPORT

To take advantage of the system modernization provided in WWP, a new report, Monitoring Report 02: Dynamic Search Tool – WPFN Replacement Report, was developed.

The primary purpose of this report is to help W-2 agency staff identify participants meeting a wide range of criteria, and allows users the freedom to create multiple datasets to meet their needs. It provides users a snapshot of a specific group of participants, with results displaying current data (as of the previous night), and is not intended for a historical view.

In addition, this report:

- Eliminates many of the shortcomings of the original WPFN search tool including the need to perform a new search after every individual participant query;
- Provides highlighting in certain fields to inform the user of expired W-2 eligibility and Employability Plans;
- Is updated daily as opposed to twice weekly as was the original WPFN search tool; and
- Contains information that can be exported to Excel for further analysis.

In addition to these new features, the following fields are available in Monitoring Report 02 and represent increased functionality that was not previously available in the WPFN tool:

- Placement Begin Date
- Placement End Date
- Months in Placement
- Eligibility Review Due Date and Month
- Employability Plan Status
- Employability Plan Start, End Date, and End Month
- Current Case Status Code
- Current FEP ID
- Marital Status
- Case Confidentiality
- Case Closure Date

REPORT ACCESSIBILITY

The report is accessible on the Webl page in WWP, so that W-2 agency workers can open the report from WWP without leaving the application and logging into Webl. In this instance, the report will only display information that matches the user's login ID. For example, a FEP will only see their assigned caseload when accessing the report from the WWP application.

The report is also available in Webl for users who have the necessary Webl login credentials at:

DCF/WISDOM/Employment Programs/W-2 Monitoring/Application and Assessment/

The report documentation is attached to this document and is available in Webl at:

DCF/WISDOM/Employment Programs/W-2 Monitoring/Report Documentation

REPORT LAYOUT

Monitoring Report 02 consists of two sections: (1) an interactive cross-tab (i.e., cross-reference) table that shows counts and summary data, and (2) a second table that shows more detailed information. The two sections are linked, meaning when a user selects a cell in the upper cross-tab table (i.e., CMC placements with Eligibility Review Due date of 2019-02), the lower details table filters down to display those specific individuals.

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BUREAU OF WORKING FAMILIES

Monitoring Report 02: Dynamic Search Tool - WPFN Replacement Report

Placement cross-referenced by Eligibility Review Due	2019-02	2019-03	2019-04	2019-05	2019-06	2019-07	2019-08	Total
CM+	1	5	4	4	2	1	2	19
CMC		2	1			1		4
CMF		3	8	7	3	3		24
CMN				1				1
CMP			2					2
CS2		1						1
CSJ		4	5	5	2	2	1	19
W2T		1	4	4	4	1	4	18
Total:	1	16	24	21	11	8	7	88

(1) Interactive cross-tab Table

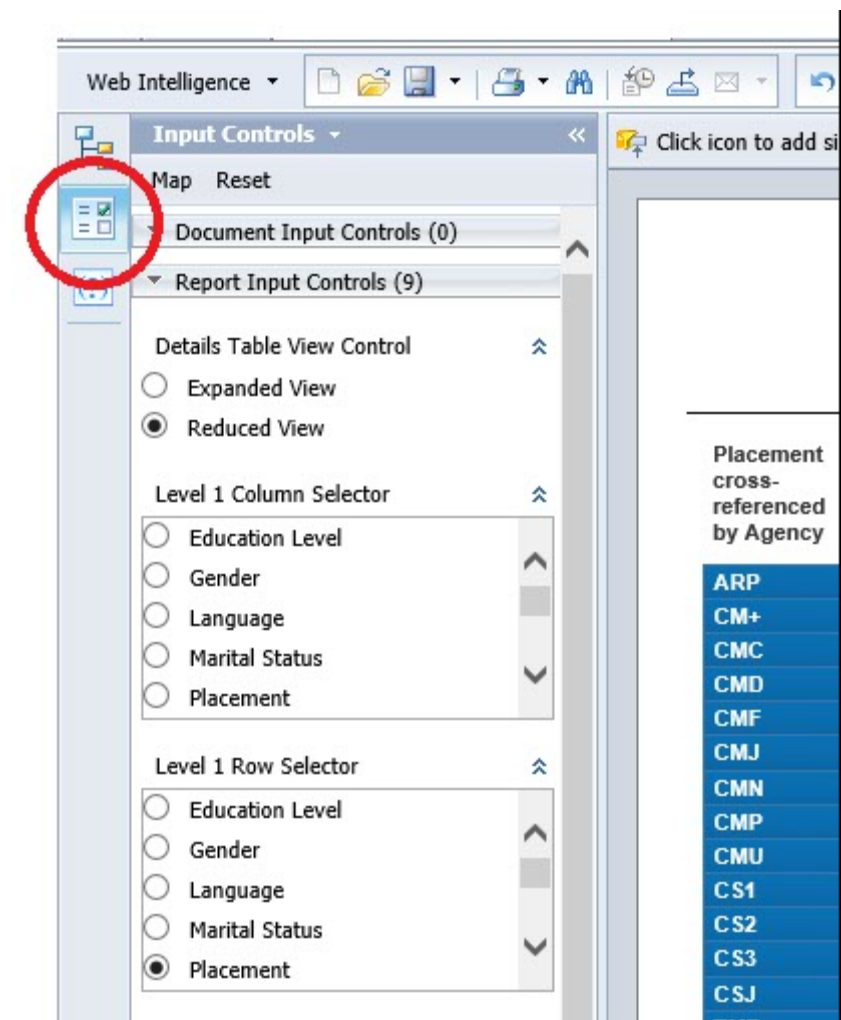
(2) Detail Table

Count of Selected Participants: 88 (sorted by Case Number - Reduced View)

Case Number	Participant PIN	Participant Last Name	Placement Code	Placement Begin Date	Months in Placement	Placement End Date	Most Recent Case Filing Date	Eligibility Review Due Date	Eligibility Review Due Month	Current Employability Plan Status	Employability Plan Start Date	Employability Plan End Date
1234592301	9876544219	SHAY	W2T	12/19/2011	86		12/28/2010	8/31/2019	2019-08	Current EP	3/1/2019	8/31/2019
1234532702	9876580314	SHAY	W2T	8/13/2018	6		4/19/2017	4/30/2019	2019-04	Current EP	2/27/2019	4/30/2019
1234539507	9876577356	SHAY	W2T	1/14/2019	1		11/20/2007	6/30/2019	2019-06	Current EP	2/22/2019	6/30/2019

Users accessing the report through WebI will be able to filter the data through additional optional report prompts for W-2 Contract Agency, FEP ID, WP Office, County, and W-2 Contractor Region to help narrow the focus of the data on the report.

This report uses a series of radio buttons, accessed by clicking the Input Controls button on the WebI Side Panel (see screenshot below) to narrow the search criteria or add more detail-level data to the details section of the report. Users can use the input controls to change the rows and columns of the cross-tab table, change the sorting of the details table, and expand or hide columns in the details table.



See the attached [Monitoring Report 02 Documentation](#) for more guidance on using the dynamic search features.

The following WPFN fields are not available in Monitoring Report 02:

- Dates of Birth
- Earned Income
- Component Phase
- Component Anticipated End Dates
- DOT Code
- Provider ID
- Funding Source
- DISP CD
- ACT CD
- JRI
- E/SC COD
- LearnFare Status
- Children First Status
- Referral Date
- Sub-Program Code

- Tribal Member
- SYS STAT
- Ethnicity

These fields can be added to the report if there is a demonstrated need for this information in the future.

TRAINING

A desk aid will be available by May 31, 2019 with instructions on using all reports available through WWP. User specific training sessions will be scheduled as needed. These trainings will be tailored to the specific user groups using this tool.

AGENCY ACTION

W-2 agency staff should become familiar with Monitoring Report 02: Dynamic Search Tool – WPFN Replacement Report. Users should document and report any issues experienced while using the report. Managers should also document any gaps or improvements they would like to see on the report.

ATTACHMENTS

[Monitoring Report 02 Documentation](#)

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

DCF/DFES/BWF/PS