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State of Wisconsin
Governor Tony Evers



TO: **W-2 Agencies**
Child Support Agencies
Children First Contractors and
Subcontractors
Training Staff
TJ Contractors and Subcontractors
TMJ Contractors and Subcontractors

BWF OPERATIONS MEMO							
No:	20-05 (Amended)						
DATE:	04/17/2020						
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W-2	<input checked="" type="checkbox"/>	EA	<input type="checkbox"/>	CF	<input checked="" type="checkbox"/>	JAL	<input type="checkbox"/>
RAP	<input checked="" type="checkbox"/>	TJ	<input checked="" type="checkbox"/>	TMJ	<input checked="" type="checkbox"/>	Other EP	<input type="checkbox"/>

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

SUBJECT: *PIN Comments and Additional Updates in the Wisconsin Work Programs System*

CROSS REFERENCE: [BWF Operations Memo 19-02](#)
[W-2 Policy Manual Section 4.2.2.1](#)
[W-2 Policy Manual Section 4.3.3](#)

EFFECTIVE DATE: May 6, 2020

PURPOSE

The purpose of this memo is to:

1. Announce that PIN comments are moving from CARES Mainframe to the Wisconsin Work Programs (WWP) system; and
2. Describe additional updates to the Informal Assessment in WWP.

BACKGROUND

On February 23, 2019, workers began using the WWP online application to perform Enrollment and the Informal Assessment for the Wisconsin Works (W-2), Transitional Jobs (TJ), and Transform Milwaukee Jobs (TMJ) programs

(See [BWF Operations Memo 19-02: 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](#))

The Bureau of Working Families (BWF) continues to look for ways to use WWP to modernize processes and improve efficiency in case management.

As part of case documentation, workers may record information using two different types of comments:

1. Case comments to describe a case level event that impacts eligibility issues, such as case reviews, verification, or adding or deleting household members; and
2. PIN comments to describe a PIN level event, such as good cause, informal assessment summary, or general notes recording individual contact as it relates to work program participation.

Currently, workers enter PIN comments in CARES Mainframe on CMCC. In an effort to streamline the gathering and accessing of information, the process of viewing and adding PIN comments is moving to WWP. This will allow workers to add PIN comments while navigating through the informal assessment and other pages associated with a PIN. There are no changes made to CWW case comments at this time.

W-2 POLICY UPDATES

W-2 policy updates are summarized below. Relevant policy manual sections are attached to this memo and will be incorporated into the W-2 Manual upon implementation. Policy that was removed is struck through and policy that was added is underlined.

POLICY REFERENCES TO COMMENTS

Current Policy

Throughout the W-2 Policy Manual, all comments are referred to as case comments. [W-2 Policy Manual Section 4.3.3](#) details the difference between case-level case comments and PIN-level case comments, and in which system each is entered.

Updated Policy

The W-2 Policy Manual was updated to replace system references to PIN Comments being entered on CARES screen CMCC. Additionally, the use of "PIN-level" and "case-level" case comments was eliminated throughout the manual to ensure consistency and clarify the distinction between the two types of comments. Throughout the W-2 Policy Manual, when "case comment" is used, it is referring to a CWW case comment, and when "PIN comment" is used, it is referring to a WWP PIN comment.

[See attached updated W-2 Policy Manual sections](#)

CONFIDENTIAL INFORMATION IN COMMENTS

Current Policy

W-2 agencies may not disclose confidential information in comments and must cross-reference confidential information by only generally referencing information on CARES screen CMCC and noting further details are in ECF.

Updated Policy

W-2 agencies may not disclose confidential information in comments and must note that further details are in ECF and/or the WWP **Participant Barrier** page. The examples in [W-2 Policy Manual Section 4.3.3](#) were updated to reflect more appropriate language and remove general references to confidential information.

See [W-2 Policy Manual Section 4.2.2.1](#) for a listing of confidential information that must never be entered in comments.

[See attached updated W-2 Policy Manual section 4.3.3](#)

TJ AND TMJ POLICY UPDATES

There are no TJ and TMJ policy updates associated with this memo.

CHILDREN FIRST POLICY UPDATES

There are no Children First policy updates associated with this memo.

WWP CHANGES

Effective **May 6, 2020**, workers may view and add PIN comments in WWP.

VIEWING PIN COMMENTS IN WWP

To access a list view of all PIN comments for an individual in WWP, workers can select the PIN Comments button in the Case Management tab to navigate to the **PIN Comments** page. (See Figure 1)



Figure 1 The PIN Comments button via the Case Management Tab.

On the **PIN Comments** page, each comment will display with the date and time the worker entered the comment, the worker name, and the comment type(s). Comments will display by default in chronological order starting with the most recent entry.

Additional filters will be available to filter the list of comments by comment type, worker name, and date range. Workers can use one or multiple filters at the same time to see the desired list of comments. (See Figure 2)

The screenshot shows the 'PIN Comments' interface. At the top left, there is a back arrow and the title 'PIN Comments' with a help icon. At the top right, the 'Participant Name' is '999999999'. Below this is a '+ Add PIN Comment' button. The main area contains a filter section with 'Filter' (Comment Type), 'Worker Name', 'From' (MM/DD/YYYY), and 'To' (MM/DD/YYYY) fields, along with 'Apply' and 'Reset Filters' buttons. Below the filter section is a table with columns for Date, Comment, Comment Types, and Worker Name. The table shows one entry: Date '12/18/19, 9:16 AM', Comment 'PIN comment', Comment Types 'General', and Worker Name 'Audrey Proano'.

Figure 2 PIN Comment list view filters

The Comment Type and Worker Name drop-downs are multi-select, allowing workers to select one or more options. These drop-downs are dynamic and will display only the comment types or workers associated with the comments for the specific participant.

The date filter requires entry in both the From and To fields. The From field can be any date in the past, and the To field can be any date equal to or later than the From field up to the current date. Workers must select the Apply button to utilize this filter.

ADDING A PIN COMMENT IN WWP

Workers can add a PIN comment in two different ways:

1. Selecting the Add PIN Comment button located as a side bar on the left of the page while navigating through WWP on PIN-specific pages* (see Figure 3); or
2. Selecting Add PIN Comment from the **PIN Comments** page (see Figure 4).

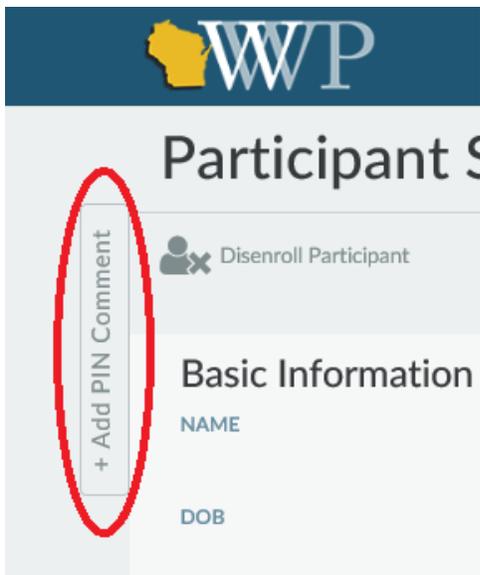


Figure 3 Add PIN Comment button while navigating through WWP.

*Exception: The Add PIN Comment button is not available on the **Client Registration** page and the **Request For Assistance** page.

Figure 4 Add PIN Comment button in the PIN Comments page.

Upon selecting Add PIN Comment from either location, the **Add PIN Comment** page appears as a new page. (See Figure 5) This page has two required fields: The Comment entry field, which allows for up to 1,000 characters, and the Comment Type drop-down. Upon saving the comment, WWP will return to the page you were at prior to selecting Add PIN Comment.

Figure 5 Entering a PIN Comment.

COMMENT TYPES

Attaching comment types allows for better identification and future analysis of comment content. The following are available comment types to attach to a comment:

1. Appointment – EP Review;
2. Appointment – Other;
3. Attempted Contact;
4. Employability Plan/Activity Assignment;
5. Employment;
6. Fraud;
7. General;
8. Good Cause Determination;
9. Informal Assessment;
10. Missed Appointment;
11. Non-Health Barriers;
12. Overpayments or Auxiliary Payments;
13. Participation Tracking;
14. Performance Claims;

- 15. Phone Contact;
- 16. Placement Decision;
- 17. Program Completion;
- 18. Third Party Contacts;
- 19. Time-Limits/Extensions; and
- 20. Working with Partner Agencies.

Comment types available will vary depending on the program. This is a multi-select drop-down which allows workers to add one or more comment types for each comment.

EDITING PIN COMMENTS IN WWP

Upon saving a new PIN comment, only the comment author can edit the comment on the same calendar day as originally entered by selecting the pencil icon. (See Figure 6) Following that day, the comment will be view-only, and the comment cannot be edited. PIN comments can never be deleted.

Date	Comment	Comment Types	Worker Name	
11/15/19, 1:11 PM	PIN comment	Missed Appointment	Audrey Proano	

Figure 6 Selecting the pencil icon to edit a PIN comment.

Edited comments will display a text indicator to the right of the comment. (See Figure 7)

Date	Comment	Comment Types	Worker Name	
11/15/19, 1:11 PM	PIN comment	Missed Appointment	Audrey Proano	Edited

Figure 7 Text indicator identifying an edited comment.

SECURITY FOR PIN COMMENTS

The following W-2 security roles have access to view and add PIN comments in WWP: W-2 Case Management – FEP, W-2 Case Management – Other, W-2 Case Management Supervisor, W-2 Resource Specialist, and W-2 QC Staff.

TJ and TMJ workers with security access to view and edit PIN-level data in WWP can view and add PIN comments.

CARES AND CARES WORKER WEB (CWW) CHANGES

Effective **May 6, 2020**, PIN comment entry will be disabled on CARES screen CMCC. PIN comments that were entered within the past year will convert to WWP and be available in the list view on the **PIN Comments** page with a General comment type. Older PIN comments that were not converted will be viewable on CARES screen CMCC only.

Workers can continue to add PIN comments in CWW on the following pages:

1. **W-2 Up-Front Activity Requirements;**

2. **Work Programs Referral/Action;**
3. **W-2 Placement;**
4. **W-2 Placement Summary;** and
5. **Federal TANF Two Parent Participation.**

All new PIN comments added in CWW will transfer to WWP and be available on the **PIN Comments** page in WWP on the calendar day following the comment entry. Comments transferred from CWW will be view-only and identified with the CWW PIN Comment type.

PIN comments converted from Mainframe and new PIN comments transferred from CWW will contain the comment text, the date the comment was entered, and the worker's name who entered the comment (if available).

Note: All converted and transferred PIN comments will have a time stamp of 12:00 AM, which does not reflect the actual time entered in Mainframe or CWW.

ADDITIONAL UPDATES IN WWP

The following additional updates were made to the Informal Assessment in WWP:

1. The introduction text on the **Participant Barriers** page was updated to:

The following questions are about your health and wellness. We will use this information to help you get any accommodations that you may need to find and keep a job.

2. On the **Family Barriers** page, if the applicant or participant answers yes to the question "Have you ever been denied for SSI or SSDI?", the dynamic follow-up question was updated to clarify that both the month and the details fields are required:

What was the approximate month, year, and details for the last denial?

3. On the **Non-Custodial Parents** page, if a non-custodial parent answers yes to having child(ren) 18 or under who live with another individual most of the time, additional questions appear to provide more information. If the question "Child support order?" is answered yes, a new feature will display below the question "How much child support are you ordered to pay each month?". A Child Support Contact section will appear where the FEP can enter the child support worker's contact information. Child Support Worker was added as a new contact title available to enter in this new feature and in the contacts application.

TRAINING

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

AGENCY ACTION

W-2 agencies must become familiar with the new functionality as described in this memo and update any relevant local agency procedures.

ATTACHMENTS

[W-2 Policy Manual updated sections](#)

CONTACTS

For W-2 Policy Questions: DCFW2PolicyQuestions@wisconsin.gov

For TJ/TMJ Policy and Processing Questions: DCFDFESBWFFContracts@wi.gov

For Children First Policy Questions: BCSINFO@wisconsin.gov

For W-2, TJ/TMJ, and Children First CARES or WWP Functionality Questions: BWF Work Programs Help Desk

DCF/DFES/BWF/AP