

DEPARTMENT OF CHILDREN
AND FAMILIES
Secretary Emilie Amundson
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

BWF OPERATIONS MEMO	
No:	20-16
DATE:	06/05/2020
W-2 <input checked="" type="checkbox"/>	EA <input type="checkbox"/> CF <input type="checkbox"/> JAL <input type="checkbox"/>
RAP <input type="checkbox"/>	TJ <input type="checkbox"/> TMJ <input type="checkbox"/> Other EP <input type="checkbox"/>

SUBJECT: *New Assessment Codes for Individuals Completing an Assessment of the Need to Care for a Family Member with a Disability*

CROSS REFERENCE: [W-2 Manual 5.5.4 Obtaining a Complete Assessment](#)
[W-2 Manual 7.4.2 W-2 Transition](#)
[W-2 Manual Appendix Activity Codes](#)

EFFECTIVE DATE: 06/15/2020

PURPOSE

The purpose of this memo is to announce new activity codes for individuals completing an assessment documenting the need to be the sole provider of care for a family member who is ill or incapacitated.

BACKGROUND

Most W-2 formal assessments have discrete activity codes to record the assessment and subsequent activity. One exception is assessment of an individual's need to care for a family member with a disability.

Formal Assessment Code	Subsequent Activity Code
AA - AODA Assessment	CA - AODA Counseling
AD - Disability and Learning Assessment	PR - Physical Rehabilitation if six months or less MP - (see below) if more than six months
AL - Physician's Assessment	MP - Ongoing Medical/Personal Care
AM - Mental Health Assessment	CM - Mental Health Counseling
CD - Caring for Disabled Child	CD - Caring for Disabled Child
CF - Caring for Other Family Member	CF - Caring for Other Family Member

Currently, the CD and CF codes are used for both the assessment of the need to provide care for a family member and provision of care to the family member. This dual function has caused systems issues and extra work for staff. To address these issues, BWF created two new formal assessment activity codes to differentiate the assessment from the provision of care.

W-2 POLICY UPDATES

W-2 policy updates are summarized below. Relevant W-2 Manual sections are attached with all policy updates incorporated. Policy that was deleted is struck through and policy that was added is underlined.

5.5.4 OBTAINING A COMPLETE ASSESSMENT

Current Policy

A formal assessment is required for individuals placed in a W-2 Transition (W-2 T) employment position due to being needed in the home to care for a family member who is ill or incapacitated.

Per W-2 Manual [7.4.2](#), when determining the need for an individual to remain in the home to care for a family member who is incapacitated or disabled, the [Need to Care for Disabled Family Member \(10786\)](#) form is used to verify the family member's incapacity or disability and determine whether adequate day/child care is available for the family member so that the individual can engage in work training activities outside the home.

Although form 10786 is required when the barrier is related to the care for another household member, it does not meet all of the requirements of a formal assessment. Form 10786 serves as a substitute for obtaining a formal assessment when the individual is placed in a W-2 T and assigned to care for another member of the W-2 Group who is ill or incapacitated.

Policy Update

W-2 Manual section 5.5.4 is updated to support current practice and clarify that completion of Form 10786 is sufficient documentation of the need for an individual to be the sole provider of care when the individual is placed in W-2 T and assigned to care for another member of the W-2 Group who is ill or incapacitated.

Record family barriers, including caretaking responsibilities, on the **Family Barriers** page in the WWP Informal Assessment. Document non-confidential information in PIN comments.

[See attached updated W-2 Manual section 5.5.4](#)

APPENDIX ACTIVITY CODES

Current Policy

Currently, the CD and CF codes are used for both the assessment of the need to provide care, and the provision of the care.

Updated Policy

BWF created the AC and AF codes to differentiate the assessment from the provision of care.

Formal Assessment Code	Subsequent Activity Code
AA - AODA Assessment	CA - AODA Counseling
AD - Disability and Learning Assessment	PR - Physical Rehabilitation if six months or less MP - (see below) if more than six months
AL - Physician's Assessment	MP - Ongoing Medical/Personal Care
AM - Mental Health Assessment	CM - Mental Health Counseling
AC - Assessment for Child with a Disability	CD - Caring for Disabled Child
AF - Assessment for Other Family Member	CF - Caring for Other Disabled Family Member

Going forward, agencies should only use CD and CF to reflect hours when care is being provided by an individual for a W-2 Group member who is ill or incapacitated.

- Assign AC when an individual is involved in an assessment of the need to be the sole provider of care for a dependent child with a disability or incapacitation. Assign CD for the time spent caring for the child.
- Assign AF when an individual is involved in an assessment of the need to be the sole provider of care for a W-2 Group member with a disability or incapacitation, when that W-2 Group member is not a child or foster child. Assign CF for the time spent caring for the W-2 Group member.

BWF updated W-2 Manual Appendix Activity Codes to include the new assessment codes and their descriptions.

[See attached updated W-2 Manual Appendix Activity Codes](#)

CARES UPDATES

This functionality provides two new assessment activity codes available for assignment on CARES screen WPCH. These new assessment codes function like other formal assessment activity codes in that, while they are assigned, no payment reductions are applied for any assigned activities. Assignment to the AC or AF assessment activity code excludes the case from federal Work Participation Rate calculations.

TRAINING

The Partner Training Team is updating training materials to reflect these updates.

AGENCY ACTION

W-2 agencies must discuss the policy updates and clarifications with staff. W-2 agencies must also update any relevant local agency procedures.

ATTACHMENTS

Updated W-2 Manual sections

[5.5.4 Obtaining a Complete Assessment](#)

[Appendix Activity Codes](#)

CONTACTS

For W-2 Policy Questions: DCFw2PolicyQuestions@wisconsin.gov

For W-2 CARES and WWP Functionality Questions: BWFworkprogramsHD@wisconsin.gov

DCF/DFES/BWF/DH