



TO: **W-2 Agencies
Training Staff**

FROM: Patara Horn, Director
Bureau of Working Families
Division of Family and Economic Security
Department of Children and Families

| BWF OPERATIONS MEMO | | | | | |
|---------------------|-------------------------------------|-----|-------------------------------------|----|--------------------------|
| No: | 21-07 | | | | |
| DATE: | 03/02/2021 | | | | |
| W-2 | <input checked="" type="checkbox"/> | EA | <input checked="" type="checkbox"/> | CF | <input type="checkbox"/> |
| JAL | <input checked="" type="checkbox"/> | | | | |
| RAP | <input type="checkbox"/> | TMJ | <input type="checkbox"/> | TJ | <input type="checkbox"/> |
| Other EP | <input type="checkbox"/> | | | | |

SUBJECT: *Updated Features in CARES Worker Web Client Scheduling and Simplified Inbox*

CROSS REFERENCE: [CWW Process Help - Client Scheduling](#)
[BWF Operations Memo 20-08](#)
[BWF Operations Memo 20-14](#)
[BWF Operations Memo 20-21](#)
[EA Manual Section 1.2.2](#)
[EA Manual Section 1.3.3](#)

EFFECTIVE DATE: February 27, 2021

PURPOSE

The purpose of this memo is to:

1. Announce updates to Client Scheduling and the Simplified Inbox; and
2. Provide guidance to W-2 agencies on the updated CARES Worker Web (CWW) system functionality for Client Scheduling and the Simplified Inbox.

BACKGROUND

In response to COVID-19, the Bureau of Working Families (BWF) released two operations memos in Spring 2020 regarding accelerated work to functionality on the public facing web portal, ACCESS. On April 25, 2020, BWF announced in Operations Memo [20-08](#) its accelerated work to allow individuals to request Wisconsin Works (W-2), Job Access Loan (JAL), and Emergency Assistance (EA) programs in ACCESS. On May 30, 2020, BWF announced in Operations Memo [20-14](#) updated functions for W-2, JAL, and EA requests for assistance in ACCESS. These accelerated projects were designed to simplify and shorten the application

timeline for BWF programs while BWF continued work on a longer-term project to allow individuals to apply for these programs in ACCESS.

On October 24, 2020, ACCESS was updated to include the ability for the public to submit applications for W-2, JAL, and EA. Since then, a few enhancements have been identified through agency feedback, to assist in monitoring and processing applications more efficiently.

POLICY

There are no W-2 or JAL policy changes for these updates.

EA policy updates are summarized below. The relevant policy manual section is attached to this memo and will be incorporated into the EA Manual. Policy that was removed is struck through and policy that was added is underlined.

1.2.2 COMPLETING THE EMERGENCY ASSISTANCE APPLICATION

Current Policy

Applicants using ACCESS to complete an EA application will review the assurance statements and sign them through their electronic signature on the online application. The W-2 agency staff person must review these assurance statements with the applicant during the application process to ensure the applicant has the opportunity to ask for clarification.

Updated Policy

Language was added to clarify that W-2 agencies must contact ACCESS applicants following submittal of the application to determine eligibility within five working days.

[See attached the updated EA Manual Section 1.2.2](#)

1.3.3 ISSUING AN ELIGIBILITY NOTICE OF DECISION

Current Policy

Once eligibility has been determined, the W-2 agency must issue a notice of decision regarding eligibility to all applicants within the five working days timeframe, including when a payment delay is required.

Updated Policy

Language was added to clarify that a notice of decision must also be issued to applicants in the case of an applicant choosing to withdraw their application.

[See attached the updated EA Manual Section 1.3.3](#)

CARES WORKER WEB (CWW)***CLIENT SCHEDULING UPDATES***

The W-2 worker will have an additional option in Client Scheduling when scheduling a W-2 or JAL initial application appointment using the AQ - W-2 Application Appt/Phone code or AP - W-2 Application Appt/Office. In addition to using the CARES or Request for Assistance (RFA) numbers to schedule an appointment, the agencies will also have the option to use the ACCESS tracking number. This will allow agencies to schedule appointments for applicants that choose to contact the agency to schedule an appointment after submitting an application through ACCESS or those who need to reschedule a previously scheduled appointment made through ACCESS.

A new Client Scheduling appointment type will be available for agencies to use to schedule EA appointments. The new appointment type is EA – Emergency Assistance Appointments.

Details

Slot

Begin:

End:

Appts:

Reserve?:

Location:

Activity Type:

Case/RFA/Application Based

PIN Individual Based

PIN Group Based

FSET PIN Individual Based

FSET PIN Group Based

Protected

Other

AQ - W-2 Application Appt/Phone

AT - W-2 Elig Rev/Phone

EA - Emergency Assistance Appointment

EH - Eligibility

Emergency Assistance Appointments will use the ACCESS EA tracking number. The EA application tracking number is located on the Simplified Inbox under Tracking Number or on the EA application PDF. The EA application tracking number is a unique number not associated with Income Maintenance or W-2 applications.

| Applications Listing | | | | | | | | | | |
|------------------------|----------|-----------------------|---------------|----------------|-------------|--------------------|-------|-------------|-----------------|------|
| Status | Cnty/Trb | Agency Name | Agency Worker | Applicant Name | Filing Date | Programs Requested | Zip | Case Number | Tracking Number | View |
| Processed Withdrawn | | FORWARD SERVICE CORP. | | RILEY, A | 01/25/2021 | EA | 53704 | 5151123254 | 7800762971 | View |



****Keep in mind that you do not need to mail this print-out to your local agency.****

Thank you for using ACCESS to apply for benefits!

ANDI RILEY, your application was submitted on January 25, 2021 at 08:27 A.M. The following agency will review your application and/or manage your case.

W-2 Agency Physical Address

Agency Address: [Click here](#)

Phone: 1-855-733-1311

W-2 Agency Mailing Address

FORWARD SERVICE CORP.
4600 American Parkway
Suite 301
Madison WI 53718

Phone: 1-855-733-1311

Your Emergency Assistance application tracking number is **7800762971.**

SIMPLIFIED INBOX UPDATE

An enhancement will be added to the CWW Simplified Inbox to allow a worker to select from the Status dropdown box if an EA application or simplified request was processed or withdrawn. Once a worker has marked the request or application as "Withdrawn", and the page is saved, all withdrawn requests and applications are removed from the unprocessed list.

The screenshot shows the Cares Worker Web interface. At the top, there is a navigation bar with 'User ID: XCTV59', 'User Name: J KAHL', and 'Quick Select: CASE/RFA'. Below this is a search criteria section for 'W-2, JAL, and EA ACCESS Requests'. The search criteria include: Filing Date: Between 12/28/2020 and 01/27/2021; Programs Requested: W-2, JAL, EA; Status: Unprocessed; Agency: BOS SOUTHWEST. Below the search criteria is an 'Applications Listing' table with columns: Status, Cnty/Trb, Agency Name, Agency Worker, Applicant Name, Filing Date, Programs Requested, Zip, Case Number, Tracking Number, and View. The table contains one entry with Status 'Processed Withdrawn', Agency Name 'FORWARD SERVICE CORP.', Applicant Name 'RILEY, A', Filing Date '01/25/2021', Programs Requested 'EA', Zip '53704', Case Number '5151123254', and Tracking Number '7800762971'. A red arrow points to the 'Processed Withdrawn' status in the table. The interface also includes a navigation menu on the left and buttons for 'Cancel', 'Reset', 'Previous', and 'Save'.

Workers will continue to use the existing Simplified Requests search functionality to find EA requests or applications. A new search criterion was added for Status, adding "Withdrawn" to the dropdown menu. All other search criteria, default values, and access rules for this page will remain the same, allowing workers to search for past simplified requests for W-2 and JAL along with past and current EA submissions.

Note regarding WWP entries:

If an individual submits a completed EA application in ACCESS and subsequently chooses to withdraw their application, W-2 agencies must process the application in Wisconsin Work Programs (WWP) with the "Withdrawn" application status. If an individual submits a simplified request for EA in ACCESS and chooses not to proceed with the application process, agencies should not enter any record in WWP. Agencies should manually track their attempts to contact the applicant and/or the applicant's decision not to proceed with the EA application process. See Operations Memo [20-21](#) for more information on who can submit a completed EA application and who must submit an EA simplified request.

AGENCY ACTION

W-2 agencies must familiarize staff with the functionality and policy changes as described in this memo and update any relevant local agency procedures.

ATTACHMENTS

[EA Manual sections 1.2.2 and 1.3.3](#)

CONTACTS

For W-2 Policy Questions: DCF2PolicyQuestions@wisconsin.gov

For W-2, CARES, and WWP Functionality Questions: BWF Work Programs Help Desk
BWFworkprogramsHD@wisconsin.gov

DCF/DFES/BWF/JK