



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:	21-14				
DATE:	05/14/2021				
W-2	<input checked="" type="checkbox"/>	EA	<input type="checkbox"/>	CF	<input type="checkbox"/>
JAL	<input type="checkbox"/>				
RAP	<input type="checkbox"/>	TMJ	<input type="checkbox"/>	TJ	<input type="checkbox"/>
Other EP	<input type="checkbox"/>				

SUBJECT: *Implementation of Wisconsin Work Programs Phase 2 – Updates to Wisconsin Works*

**CROSS REFERENCE:** [DFES Administrator’s Memo 21-03](#)  
[Wisconsin Works \(W-2\) Manual](#)  
[WWP Application – User Setup Form \(DCF-F-5212-E\)](#)  
[BWF Operations Memo 21-13](#)

**EFFECTIVE DATE:** June 28, 2021

**PURPOSE**

The purpose of this Operations Memo is to provide information and guidance to Wisconsin Works (W-2) agencies in preparation for Phase 2 implementation of the Wisconsin Work Programs (WWP) System. More specifically, this memo:

1. Summarizes changes and highlights new features in WWP as part of the Phase 2 modernization efforts; and
2. Communicates W-2 policy changes to support changes made in Phase 2 modernization efforts.

**BACKGROUND**

Phase 1 implementation of the WWP application successfully occurred in February 2019 and modernized data collection for a portion of the work program case management functions which were previously in CARES Mainframe.

Phase 2 implementation of WWP is scheduled for the weekend of June 26, 2021.

The W-2 program functionality available in Phase 2 includes:

1. Employability Plans (EP), Activity Assignment, and new Participation Statuses
2. Participation Tracking, Good Cause, and Make-Up Hours
3. Automatic calculation and issuance of W-2 Auxiliary Payments
4. Creation of Manual Auxiliaries
5. A new Worker Task List
6. Worker Transactions
7. W-2 Performance Outcome Payments

Future phases of the project will modernize the remaining CARES Mainframe work program functionality. Until all functionality is modernized, W-2 workers will continue to navigate to CARES Mainframe for actions related to:

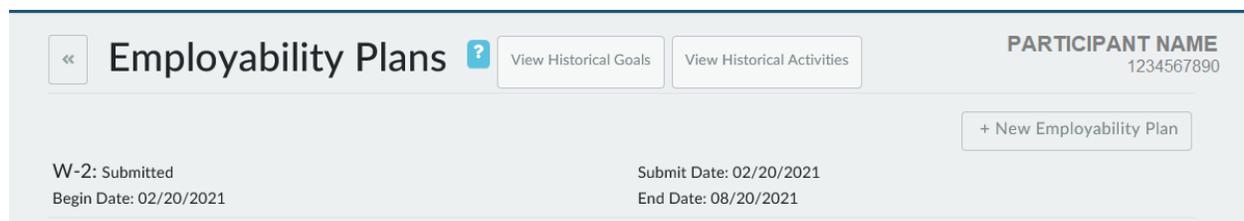
- Lost, stolen, or destroyed checks;
- Replacement and release of checks (including W-2, Vendor, and Job Access Loan (JAL) checks);
- Failed Electronic Funds Transfers;
- Overpayment claims; and
- The JAL application process.

## ***WWP UPDATES***

Details regarding how to use the new features in WWP can be found in training materials through the Partner Training Team. Below are summaries of enhancements to functionality formerly in CARES Mainframe which are now in WWP, as well as additional features that will be available.

### ***EPS AND ACTIVITY ASSIGNMENT***

The EP for W-2 applicants and participants will be created, viewed, and printed in WWP. To add a new EP or view a list of the current and previous EPs, select “Employability Plan” from the Case Management tab. (See Figure 1)



**Figure 1** Employability Plans page.

The new EP in WWP has four sections:

1. **Goals:** In addition to existing goal functionality being modernized from CARES Mainframe, there is a new feature to add goal steps which document smaller, specific actions the applicant or participant can take to reach the goal.

**Figure 2** Add Goal page to add a goal and goal step(s) to an EP.

2. **Employments:** Instead of an assignable activity code, an applicant or participant's current employment(s) is added to the EP by selecting from a list of employment(s) that were added to the **Work History** page.

**Figure 3** Employments section of the EP to add a current employment to the EP.

3. **Activities:** Activity assignment is part of the development of the EP. For each assigned activity, Financial and Employment Planners (FEP) record the daily number of hours and optional activity start and end times as well as other information about the activity.

**Figure 4** Add activity page to add an activity to an EP.

4. **Supportive Services:** Supportive services the W-2 agency will provide the applicant or participant to assist in completing the W-2 activities are added to the EP in this section by selecting from the dropdown.

**Figure 5** Supportive Services section of the EP to add a supportive service to the EP.

Additional clarifications about the new EP in WWP:

- Once submitted, EPs cannot be edited, except when documenting that activities have ended and the planned end date has passed. When a change is needed, such as adding a new activity or changing a goal, a new EP must be created.
- Current EPs in “Submitted” status are printable by selecting the current EP from the EP list view and clicking “Print Employability Plan.” In addition to the information entered in the four sections described above, a daily schedule of activities will print with the EP for the individual to manage their daily schedule of activities.
- Select “View Calendar” to see a monthly calendar view of the activities scheduled for an applicant or participant to assist you in scheduling.
- View all historical goals and activities an individual has by selecting “View Historical Goals” or “View Historical Activities” from the **Employability Plans** page.

### PARTICIPATION STATUSES

Another new feature in WWP is the addition of Participation Statuses, which represent factors that may impact an individual’s EP activity assignments in W-2 such as caring for a disabled child. While not part of the EP, they are displayed in WWP on the left side navigation menu when creating and reviewing current EPs. You must take these factors into consideration when developing the EP. Participation statuses are added by selecting “Participation Statuses” on the Case Management tab. See updated W-2 Manual section 6.4.1 in the policy attachment for more information.

### TRACKING PARTICIPATION, GOOD CAUSE, AND MAKE-UP HOURS

All participation tracking for assigned W-2 activities will be entered in WWP through the **Participation Calendar** page via the Participation Tracking tab. (See Figure 6)

Upon implementation of Phase 2, the following changes to agency processes will be in effect:

1. Instead of entering hours of non-participation, workers will enter “Hours Participated” and WWP will calculate hours of non-participation;
2. When the participant makes up the missed hours in the same week (Sunday – Saturday) they were scheduled, FEPs must record by entering the Make-Up hours;
3. Hours Participated and Good Cause hours can be entered in half-hour or hour increments; and
4. For participants receiving their first payment in the W-2 Delayed Payment Cycle, all non-participation for the entire participation period entered before the W-2 Pulldown Payment Cycle will be deducted from the payment at pulldown, even if it is entered prior to the delayed cycle. If the non-participation reduction exceeds the payment at pulldown, WWP will automatically calculate the overpayment and populate a new task on the **Worker Task List** page to process the overpayment.

« W-2 Participation Calendar ?
PARTICIPANT NAME  
1234567890

< Participation Period: March 16<sup>th</sup> 2021 - April 15<sup>th</sup> 2021 >

	Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
Full Participation	14	15	16	17	18	19	20
No Participation			ES- 5.0	ES- 5.0	ES- 5.0	ES- 5.0	
Full Participation	21	22	23	24	25	26	27
No Participation		ES- 5.0	ES- 5.0	ES- 5.0	ES- 5.0	ES- 5.0	

Figure 6 W-2 Participation Calendar page.

The participation calendar is organized by participation period. The calendar will default to the current participation period; however, the arrows at the top allow workers to navigate to previous participation periods to enter data.

When entering nonparticipation hours in WWP, the FEP must enter:

1. **Hours Participated:** Based on the scheduled hours of each activity. Hours participated must be documented for each day and activity separately, and do not include hours made up or where good cause was granted.
2. **Make-Up Hours:** Hours participated that are scheduled on one day but are made up during a different day within the same week (Sunday – Saturday). Make-Up hours are entered on the day originally scheduled.
3. **Participant’s Reason for nonparticipation:** Enter if provided, and whether good cause is granted. If good cause is granted, the number of good cause hours approved for each activity are entered on each day separately.

Only current and previous dates will be available for data entry. (See Figure 7)

✕ Employment Search for W-2/CF ?
Last Edited by WWP Batch  
3/15/21, 12:00 AM

Date:

Scheduled Hours:

Hours Participated:

Make-Up Hours:  Date:  🗑️

[+ Add Make-Up Hours](#)

Calculate

Non-Participation:

Participant's Reason: AA - Participant or Family Illness Details

Good Cause Granted? Yes No

Worker's Reason: AA - Participant or Family Illness Details

Good Cause Hours:

Cancel
Save

Figure 7 Participation data entry.

**EXAMPLE:** Lily is scheduled for five hours of an activity on 3/16/2021. She participates in two of the five hours, but she is able to make up an hour the following day on 3/17/2021. The FEP enters two hours for “Hours Participated”, one hour in “Make-Up Hours” with the date of 3/17/21. WWP then calculates two hours of non-participation. Based on the information provided to the FEP, they are able to grant one hour of good cause, which they enter in WWP. This results in one sanctionable hour for the activity.

To assist in tracking participation and identifying how the non-participation payment reduction is calculated for a participation period, the **Non-Participation/Good Cause Details** page is available via the Participation Tracking tab. (See Figure 8) This page lists all non-participation and good cause hours entered and displays the total of each category, including sanctionable and non-sanctionable hours, which determines what will factor in the non-participation payment reduction.

Non-Participation/Good Cause Details												
												PARTICIPANT NAME
												1234567890
Participation Period: February 16 <sup>th</sup> 2021 - March 15 <sup>th</sup> 2021												
Summary												
Total Non-Participation Hours											20.0	
Total Good Cause Hours											0.0	
Remaining Non-Sanctionable Hours											0.0	
Sanctionable Hours											20.0	
W-2 Placement	Date	Activity	Scheduled Hours	Non-Participation Hours	Participant's Reason	Good Cause Granted?	Good Cause Reason	Good Cause Hours	Pending or Ongoing Assessment?	Is Non-Participation Sanctionable?	Sanctionable Hours	Last Updated Date
W-2 T	02/22/2021	WE	8.0	8.0					No	Yes	8.0	03/03/2021
W-2 T	02/23/2021	WE	8.0	8.0					No	Yes	8.0	03/03/2021
W-2 T	02/24/2021	WE	8.0	4.0					No	Yes	4.0	03/03/2021
				20.0				0.0			20.0	

Figure 8 Non-Participation/Good Cause Details page.

PAYMENT DETAILS PAGE

A new **Payment Details** page detailing how a payment was calculated will be available in WWP via the Case Management tab.

By selecting a specific participation period, the following details are available following the payment issuance:

1. The base payment;
2. Any penalties or recoupments;
3. Any reductions for non-participation;
4. The final payment paid to a vendor and/or the applicant; and
5. Any unapplied sanctionable hours.

In the case of a participant starting in the Delayed Cycle, payment details are available for both the Delayed Cycle payment as well as the payment made at the W-2 Pulldown Cycle. When changes are made to a participation period, this page will update to display updated payment details.

### MAKING CHANGES AFTER THE PULLDOWN -CYCLE

Making changes to a case following the W-2 Pulldown Cycle can result in an overpayment or underpayment of benefits. WWP will now gather that information and automatically calculate in a batch process to determine if an auxiliary or overpayment must be issued or calculated. The following actions after the W-2 Pulldown Cycle will be considered and factored into the batch process:

1. Updating hours participated;
2. Adding Good Cause hours; and
3. Backdating a placement start or end date into a prior participation period.

The batch process will run every Friday evening and will include all actions throughout the week that workers have processed since the previous batch. Details of what was included in the batch calculation can be viewed in the Batch Details Report which is available on the **Payment Details** page. (See Figure 9)

The screenshot shows the 'Payment Details' page for a participant named 'PARTICIPANT NAME 1234567890'. The page includes a navigation menu on the left with a '+ Add PIN Comment' button. The main content area displays the following information:

- Participation Period: February 16 - March 15 (dropdown menu)
- Case Number: 10987654321 (dropdown menu)
- Issuance Month: 03/2021 (text input)
- Original Payment: \$ 653.00 (text input)
- Base W-2 Payment: \$ 653.00 (text input)

A green button labeled 'Batch Details Report' is located in the top right corner of the main content area and is circled in red.

**Figure 9** Batch Details Report button from the Payment Details page.

### AUTOMATING AUXILIARY PAYMENTS

Auxiliary payments to correct an underpayment will either be WWP-calculated and automatically issued or be manually added by W-2 agencies in WWP. All auxiliary payments for a PIN are displayed on the **W-2 Auxiliaries** page by selecting "Auxiliary" on the Case Management tab.

Automated auxiliary payments are system-calculated in WWP and automatically issued when a worker takes an action following either the Delayed Cycle or the W-2 Pulldown cycle that causes a recalculation of the payment amount owed. Automated auxiliaries are either issued:

1. Following a Friday night batch process for actions taken after W-2 Pulldown such as backdating a paid placement into a prior participation period or adding Good Cause for hours of non-participation; or
2. In a nightly process for backdating a placement following the Delayed Cycle.

Manual auxiliary payments can be created in WWP for cases where an auxiliary will not be calculated automatically, such as auxiliaries that must be issued as a result of a Fact Finding Review or for a participation period where a manual auxiliary has already been issued. Auxiliary payments are added by selecting the "Add Auxiliary" button on the **W-2 Auxiliaries** page of a PIN. (See Figure 10)



Figure 10 W-2 Auxiliaries page

All manual auxiliaries must be approved by a secondary person who is a designated W-2 Auxiliary Approver in WWP. W-2 agencies are responsible for keeping designated approval workers current in WWP. To add or delete an agency worker as a W-2 Auxiliary Payment Approver in WWP, the agency must complete the [WWP Application – User Setup Form \(DCF-F-5212-E\)](#). Manual auxiliary payments will be issued as part of the nightly process following approval.

Lost, stolen, or destroyed W-2 or vendor checks remain in CARES Mainframe; refer to the [Appendix – Benefit Issuance Guide](#) for more information.

WORKER TASKS

Worker tasks are alerts in WWP for reminders or actions a worker must take for a specific applicant or participant. This new feature in WWP contains both system-generated tasks and tasks workers can manually add. Examples of system-generated worker tasks include tasks related to auxiliary payments, EPs, overpayments, assessments, employment, and time limits. Worker tasks are displayed on the **Worker Task List** page via the Worker Tools tab.

On this page, you can search for a specific task or group of tasks by typing in key words or phrases, or by using the sort/filter features. Workers can remove worker tasks from the list by manually selecting the radio button on the row of the task that has been completed or is no longer needed. Additionally, tasks can be reassigned to other workers in the same agency as needed. (See Figure 11)

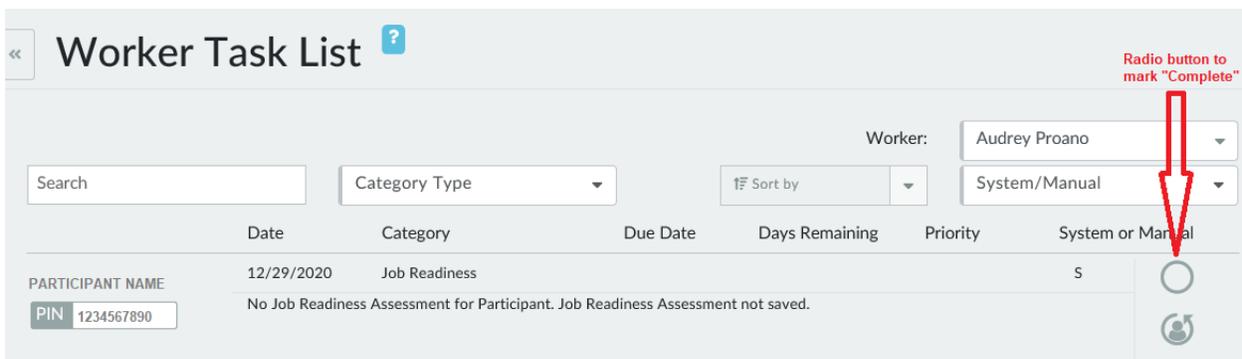


Figure 11 Worker Task List page.

Workers can manually add a worker task as a reminder to complete an action for an applicant or participant by selecting “Add Worker Task” on the sidebar of a specific PIN.

WORKER TRANSACTIONS

A new feature in WWP tracks actions workers have taken for a specific applicant or participant and displays a list of transactions on the **Transactions** page via the Case Management tab. For each transaction, the following data is displayed: Transaction Description, Transaction Date, Effective Date, Worker, Contractor, and County. On this page, you can search for a specific transaction or group of transactions by typing in key words or phrases, or by using the sort/filter features. (See Figure 12)

The screenshot shows the 'Transactions' page for a participant named 1234567890. It includes a search bar, a 'Sort by Transaction Date' dropdown, and filter options for Contractor, Worker Name, and Transaction Type. There are also 'From' and 'To' date pickers and 'Apply' and 'Reset' buttons. Below the filters is a table with the following data:

Transaction Description	Transaction Date	Effective Date	Worker	Contractor	County
New EP	03/23/2021	03/23/2021	Audrey Proano	Ross	MILWAUKEE
Activity Begins - CL	02/11/2021	02/11/2021	Audrey Proano	Ross	MILWAUKEE
New EP	02/11/2021	02/11/2021	Audrey Proano	Ross	MILWAUKEE

Figure 12 Transactions page.

W-2 PERFORMANCE OUTCOME PAYMENTS

Information regarding Performance Outcome Payment claims will be issued in a separate communication.

AUXILIARIES AND TIME LIMITS

Previously, if a monthly payment was sanctioned to zero, and an auxiliary payment was issued for that month before the monthly time limits batch, only the state and placement months would accrue. Now, the federal month will also accrue. However, if the auxiliary is issued after the time limits batch has run, then the worker will need to manually update the federal month.

**POLICY**

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

EPS, ACTIVITY ASSIGNMENT, AND PARTICIPATION STATUSES

To support changes made in Phase 2 modernization efforts, policy related to EPs and activity assignment will be updated. Policy updates include:

1. Removing references to CARES Mainframe screens associated with the EP and activity assignment;
2. Updating EP policy to match the new EP layout in WWP;
3. Removing the FEP signature requirement on the EP;
4. Including activity assignment as part of the EP instead of a separate process;
5. Adding information about new participation statuses that were formally assignable activity codes and how they must be considered when creating activities on the EP;
6. Adding information to specify that the FA – Formal Assessment Pending status must be added for participants who agree to a formal assessment to prevent non-participation sanctions until the formal assessment is completed; and
7. Adding information about Employments being included in the EP from employment added in the **Work History** page instead of an assignable activity code.

See attached the updated W-2 Manual sections:

- [4.6.1](#)
- [4.6.1.1](#)
- [4.6.2](#)
- [5.4.3](#)
- [5.5.1.1](#)
- [5.5.1.2](#)
- [5.5.7](#)
- [6.1](#)
- [6.1.1](#)
- [6.1.1.1](#)
- [6.1.1.2](#)
- [6.1.1.3](#)
- [6.1.1.4](#)
- [6.2.1](#)
- [6.2.2](#)
- [6.2.3](#)
- [6.4.1](#)
- [7.2.3.2](#)
- [7.2.4.3](#)
- [7.4.2.1](#)
- [7.4.2.2](#)
- [7.5.1.3.3](#)
- [8.3.2.3](#)
- [11.2.2.1](#)
- [Appendix – Activity Codes](#)

### TRACKING PARTICIPATION, GOOD CAUSE, AND MAKE-UP HOURS

To support changes made in Phase 2 modernization efforts, policy related to tracking participation data will be updated. Policy updates include:

1. Updating policy to align with new process for participation tracking. Workers are no longer required to enter hours of non-participation. FEPs must now enter hours participated, make-up hours, and good cause; and
2. Updating policy that FEPs must now record make-up hours when scheduled hours were missed but made up within the same week.

See attached the updated W-2 Manual sections:

- [1.2.3](#)
- [6.3.3](#)
- [7.3.3.3](#)
- [11.1.2](#)
- [11.2.3](#)
- [11.3.1](#)
- [14.4.4](#)

### AUXILIARY PAYMENTS

To support changes made in Phase 2 modernization efforts, policy related to auxiliary payments will be updated. Policy updates include:

1. Adding a description of the two different types of auxiliary payments in WWP; and
2. Updating existing auxiliary approver requirements for W-2 agencies to maintain in CARES Mainframe.as well as additional requirements for WWP.

See attached updated W-2 Manual sections:

- [10.2.6](#)
- [10.2.6.1](#)

### *OTHER*

Minor changes will be made to policy to remove system references to CARES Mainframe when applicable, as well as other updates to clarify existing case management placement names.

See attached the updated W-2 Manual sections:

- [4.4.2](#)
- [5.3.1](#)
- [7.2.4](#)
- [7.5.2](#)
- [7.5.3](#)
- [11.2.4.2](#)
- [11.4.2.1](#)
- [11.4.2.2](#)
- [11.6.2.1](#)

### ***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 and policies 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: [BWF Policy Question SharePoint](#)

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