



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:	21-22
DATE:	09/30/2021
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: *Wisconsin Works 48-Month Lifetime Limit Transition and Implementation*

CROSS REFERENCE: [Wis. Stat 49.145\(2\)\(n\)](#)
[Chapter DCF 101.09\(2\)\(n\)](#)
[W-2 Policy Manual Chapter 2.10](#)
[BWF Operations Memo 17-15: Modernization of Cares Mainframe Time Limit Screens](#)
[BWF Operations Memo 17-16: Wisconsin Works Time Limits – Policy Updates and Changes](#)

EFFECTIVE DATE: November 1, 2021

PURPOSE

The purpose of this memo is to:

1. Communicate that the Wisconsin Works (W-2) state lifetime limit will change from 60 to 48 months;
2. Describe the transition plan that will begin on November 1, 2021, and end August 31, 2022;
3. Instruct W-2 agencies to begin communicating with participants on the upcoming policy change;
4. Provide instructions for evaluating both applicants and ongoing participants for 48-month lifetime limit extension eligibility; and
5. Describe how Wisconsin Work Programs (WWP), reports, and training will support the policy changes.

BACKGROUND

[2015 Wisconsin Act 55](#) reduced the W-2 state lifetime limit from 60 to 48 months and amended statutory language surrounding availability of extensions to conform to federal law.

Under the amended state statute, a W-2 agency may extend the individual's state lifetime limit only if the W-2 agency determines that the individual is experiencing hardship or that the individual's W-2 group includes someone who has been battered or subjected to extreme cruelty. As required by statute, the Department promulgated administrative rule to define "hardship" and "battered or subjected to extreme cruelty."

The new, reduced 48-month state lifetime limit and updated extension criteria in Chapter [DCF 101.09\(2\)\(n\)](#) will be implemented on November 1, 2021.

CHAPTER DCF 101

Amendments to Chapter DCF 101 to implement statutory changes to the W-2 state lifetime limits and extension criteria will go into effect on November 1, 2021. The amended rule reflects the reduced 48-month state lifetime limit and provides that W-2 agencies may approve a lifetime limit extension if the individual is experiencing hardship or the individual's W-2 group includes someone who has been battered or subjected to extreme cruelty. The amended rule also codifies current W-2 policy that provides a 6-month extension length and allows the W-2 agency to approve unlimited extensions.

HARDSHIP

The amended rule provides that the individual is experiencing hardship due to any of the following:

1. *The individual is unable to work due to a personal disability or incapacitation.*
2. *The individual needs to remain at home to care for a member of the individual's W-2 group whose incapacity is so severe that without in-home care provided by the individual the health and well-being of the W-2 group member would be significantly affected.*
3. *The individual has significant limitations to employment such as any of the following:*
 - a. *Low achievement ability, learning disability, or emotional problems of such severity that they prevent the individual from obtaining or retaining unsubsidized employment but are not sufficient to meet the criteria for eligibility for supplemental security income under 42 USC 1383c or social security disability insurance under 42 USC 401 to 433.*
 - b. *Family problems of such severity that they prevent the individual from obtaining or retaining unsubsidized employment.*
4. *The individual has made all appropriate efforts to find work and is unable to find employment because local labor market conditions preclude a reasonable job opportunity. In this subdivision, "reasonable job opportunity" means a job that pays at least minimum wage and conforms to all applicable federal and state laws. The W-2 agency shall document at least one of the following:*

- a. *The inability of W-2 participants with similar skills or engaged in job searches in similar geographic and occupational areas, to find unsubsidized jobs.*
 - b. *The unavailability of jobs in labor market sectors that match the individual's skills, as supported by specific examples of layoffs in these labor market sectors or by labor market data published by the department of workforce development or the United States department of labor.*
 - c. *The unavailability of jobs in the labor market within a reasonable distance and travel time of the individual's home, as supported by specific examples of layoffs in this labor market or by labor market data published by the department of workforce development or the United States bureau of labor statistics.*
5. *The individual is unable to work due to current participation in a substance abuse treatment program certified to provide treatment for substance abuse under ss. DHS 75.10 to 75.15 or psychosocial rehabilitation services as approved by the department.*

BATTERED OR SUBJECTED TO EXTREME CRUELTY

The amended rule defines "battered or subjected to extreme cruelty" as someone in the W-2 group being subjected to any of the following:

1. *Physical acts that resulted in, or threatened to result in, physical injury to the individual.*
2. *Sexual abuse.*
3. *Sexual activity involving a dependent child.*
4. *Being forced as the caretaker relative of a dependent child to engage in nonconsensual sexual acts or activities.*
5. *Threats of, or attempts at, physical or sexual abuse.*
6. *Mental abuse.*
7. *Neglect or deprivation of medical care.*

POLICY

The W-2 Manual will be updated effective November 1, 2021. Ongoing participants enrolled in W-2 prior to November 1, 2021, may remain subject to the 60-month state lifetime limit until September 1, 2022, to allow appropriate time to transition. Beginning November 1, 2021, W-2 agencies must use the 48-month criteria to evaluate individuals for all lifetime limit extension decisions, including subsequent extension decisions for individuals who have reached 60 months.

W-2 Time Limits policy updates and clarifications 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.

W-2 LIFETIME LIMIT

Current Policy

W-2 eligibility has a state lifetime limit of 60 months.

New Policy

Effective November 1, 2021, W-2 eligibility has a reduced state lifetime limit of 48 months. Individuals who apply or reapply on or after November 1, 2021, will be subject to the 48-month state lifetime limit immediately upon program entry. Individuals currently in the program may remain subject to the 60-month state lifetime limit until September 1, 2022, to allow appropriate time to transition.

[See W-2 Manual Chapter 2.10.2](#)

Updates to reflect new reduced 48-month state lifetime limit were made throughout the W-2 manual.

W-2 LIFETIME LIMIT EXTENSION CRITERIA

Current Policy

The 60-month state lifetime limit extension criteria align with the definition of unusual circumstances as described in Chapter DCF 101.09(2)(n).

New Policy

The 48-month state lifetime limit extension criteria align with the definition of, “hardship and battered or subjected to extreme cruelty” as described in newly updated Chapter DCF 101.09(2)(n)

[See W-2 Manual Chapter 2.10.6.2](#)

LOCAL LABOR MARKET EXTENSION CRITERIA

Current Policy

The W-2 manual provides criteria that a W-2 agency must use to approve 24-month and 60-month extensions due to local labor market conditions.

New Policy

The local labor market criteria have been modified to align with the amended hardship criteria at Chapter DCF 101.09(2)(n).

W-2 agencies must no longer approve 24-month or 60-month extensions due to employer closures or cutbacks of sites on which the agency has historically relied to place W-2 participants in unsubsidized employment.

[See W-2 Manual Chapter 2.10.6.3](#)

2.10.6.4.1 PROCESSING INITIAL TIME LIMIT EXTENSIONS

Current Policy

A discussion between the Financial and Employment Planner (FEP) and the participant regarding a time limit extension must take place no later than the 18th month of the 24-month placement time limit and the 54th month of the 60-month state lifetime limit. In addition, the FEP must enter the time limit extension decision in the Time Limit Tracking module no later than the end of the 20th month for the 24-month placement time limit and the end of the 56th month for the 60-month state lifetime limit, unless the application is received after the 20th month or 56th month respectively.

New Policy

W-2 policy for processing initial time limit extensions has been updated to align the timing of the extension discussion and decision entry with the 48-month state lifetime limit and to simplify this instruction by referencing values displayed in WWP.

[See W-2 Manual Chapter 2.10.6.3](#)

TIME LIMIT DISCUSSIONS

Policy language was updated to clarify requirements for paid versus unpaid placements and to further explain the purpose of time limits within W-2 program goals.

[See W-2 Manual Chapter 2.10.4](#)

ADDITIONAL POLICY CLARIFICATIONS

Policy was updated throughout the W-2 manual to further clarify the purpose of time limits within W-2 program goals.

TRANSITION PLAN

Due to the shorter time limit for ongoing W-2 participants, BWF has created a transition plan for ongoing participants that are near or past 48 months used by the implementation date of November 1, 2021. This transition period is from November 1, 2021, to August 31, 2022.

During the transition period, cases will continue to close at 60 months used if no approved extension is in place. W-2 workers must continue to follow required timing for initial 60-month extension discussions. A discussion between the FEP and the participant regarding a time limit extension must take place no later than the 54th month of the 60-month state lifetime limit. In addition, the FEP must enter the time limit extension decision in the Time Limit Tracking module no later than the end of the 56th month for the 60-month state lifetime limit.

The chart below provides a short description of the groups that will be affected by the transition to 48 months and outlines when extension meetings should occur.

Group	Group Description	Extension needed during transition period?	Scheduling extension meetings	Extension meetings occurring	Extensions begin
Group A	Ongoing participants with 1 to 38 months used as of November 1, 2021	No	No later than 42 months used	Extension meetings occur per updated policy in W-2 Manual Chapter 2.10.6	1 st of the month following the month WWP displays 47 months were used
Group B	Ongoing participants with 39-41 months used as of November 1, 2021	Yes	November 2021	December 2021-April 30, 2022	June 2022-September 2022
Group C	Ongoing participants with 42-54 months used on November 1, 2021	Yes	November 2021	December 2021-April 30, 2022	April 2022-September 2022
Group D	Ongoing participants already approved for 60-month extension prior to November 1, 2021	N/A	<p>The Department of Children and Families (DCF) will honor all 60-month extensions approved prior to November 1, 2021.</p> <p>This group will be subject to the 48-month lifetime limit on September 1, 2022, and will require another extension if current extension ends prior to September 1, 2022.</p>		
Group E	Participants who apply or reapply on or after November 1, 2021, with 42 or more months used.	Yes	N/A	Extension discussion must take place at intake appointment.	

Individuals who apply or reapply for W-2 with 48 or more months used on or after November 1, 2021, will be subject to the new 48-month state lifetime limit upon application. These individuals will need to be approved for a 48-month extension under the updated hardship extension criteria to be determined eligible for W-2.

GROUP A EXAMPLE: Dora is an ongoing W-2 participant and reaches 31 months used on November 1, 2021. Because Dora will not reach 48 months used during the transition period, she is not subject to transition period rules. Her FEP will discuss possible extension with Dora no later than when she has reached 42 months used, per current W-2 policy, and must use the 48-month criteria for the extension decision.

GROUP B EXAMPLE: Trevor is an ongoing W-2 participant with 41 months used on November 1, 2021, and will reach 48 months in June 2022 before the transition period is over. His FEP must meet with Trevor about a possible extension when he reaches month 42 in December 2021. The FEP must use the 48-month criteria for decision-making since November 1, 2021, is the last day the 60-month criteria may be used. If approved for an extension, Trevor will begin his initial lifetime limit extension in June 2022.

GROUP C EXAMPLE: Jada will have 52 months used in November of 2021 and will reach 60 months in July 2022, before the transition period is over. Jada's case will close at the end of June due to reaching 60 months used unless she has an approved extension in place. The FEP must meet with Jada about an extension decision when she reaches month 54. The FEP will use the 48-month criteria for decision-making, because November 1, 2021, is the last day the 60-month criteria may be used. If approved for a lifetime limit extension, Jada will begin her initial lifetime limit extension in July 2022.

GROUP D EXAMPLE: Xeng reached 54 months in August of 2021 and was approved for an extension after meeting with their worker. Xeng's 60-month extension was approved to start in February 2022, and end in July 2022. Because DCF is honoring lifetime limit extensions approved prior to November 1, 2021, Xeng will begin their extension as planned in February 2022. The FEP must discuss the subsequent extension by May 2022 at the latest and must use the 48-month criteria for the extension decision.

GROUP E EXAMPLE: Lauren reapplies for W-2 on November 20, 2021, with 43 months of her W-2 state lifetime limit already used. Because Lauren has used more than 42 months, the FEP discusses an extension with Lauren at application and makes the extension decision based on the updated 48-month criteria implemented November 1, 2021.

AFTER TRANSITION PERIOD

August 31, 2022, is the last day individuals with 48 or more months used will be eligible for W-2 unless an extension is approved and entered in WWP. Starting September 1, 2022, ongoing cases with 48 or more months used will close automatically if an approved extension is not in place.

Individuals subject to the transition period rules will no longer be eligible as of September 1, 2022 if denied a 48-month extension. For those participants who have been denied or who have declined a time limit extension, the FEP must continue to work with the participant in the period

of time before his or her W-2 case closes to determine if circumstances have changed that would result in the need for a time limit extension. Beginning November 1, 2021, the FEP must use the 48-month criteria when reviewing the individual’s circumstances to determine the need for an extension.

WISCONSIN WORK PROGRAMS (WWP)

On November 1, 2021, WWP will be updated to display 48 maximum state months for new and reapplying individuals. WWP will display the 48-month maximum if the individual is at or below 48 state months used. If the individual is over 48 months or has an extension in place, the maximum will display as a dash.

PARTICIPANT NAME		PIN		RELATIONSHIP		CASE #		NOT AVAILABLE	
ELLENA-MSK HUERTA-MSK		500129746		SELF		LAST UPDATED		-	
FEDERAL	STATE	CSJ	W-2 T	TEMP	CMC	OPC	OTHER	OTF	0
19	23	16	3	4	0	0	0	TRIBAL	0
USED	USED	USED	USED	USED	USED	USED	USED	TJB	0
-/-	25/48	8/24	21/24	20/24	-/-	-/-	-/-	JOBS	0
REMAIN/MAX	REMAIN/MAX	REMAIN/MAX	REMAIN/MAX	REMAIN/MAX	REMAIN/MAX	REMAIN/MAX	REMAIN/MAX	NO24	0

FEDERAL	STATE	CSJ	W-2 T	TEMP	CMC	OPC
48	48	0	0	0	0	0
USED	USED	USED	USED	USED	USED	USED
-/-	6/-	-/-	-/-	-/-	-/-	-/-
REMAIN/MAX	REMAIN/MAX	REMAIN/MAX	REMAIN/MAX	REMAIN/MAX	REMAIN/MAX	REMAIN/MAX
	EXT END 01/2022					

For ongoing participants, the 48-month maximum display will occur September 1, 2022. The dash will display if an ongoing individual has an extension in place.

During the transition period for ongoing participants who will not reach 60 state months before September 1, 2022, FEPs will be able to select extension begin dates.

Add Extension Decision

Decision Deny Approve

Time Limit Type
State

Approval Reason
Details

Backdate Extension: Yes No

Notes
1000 characters remaining

BEGIN MONTH 6 months END MONTH 10/2022

04/2022
 05/2022
 06/2022
 07/2022
 08/2022
 09/2022

Cancel Save

The chart below indicates when WWP will allow extensions to be entered and begin for ongoing participants. WWP will allow extensions to be entered during the months shaded in green. Yellow shading indicates the range of extension start months from which the FEP may select.

For example, for the ongoing participant with 44 state months used in December 2021 (**44*** in the chart below), WWP will allow the FEP to enter the extension decision in December, January, February, and March. If approved, the FEP may select April, May, June, July, August, or September as the extension begin month. If the decision is a denial, eligibility will end August 31, 2022.

Dec-21	Jan-22	Feb-22	Mar-22	Apr-22	May-22	Jun-22	Jul-22	Aug-22	Sep-22
39	40	41	42	43	44	45	46	47	
40	41	42	43	44	45	46	47		
41	42	43	44	45	46	47			
42	43	44	45	46	47				
43	44	45	46	47					
44*	45	46	47						
45	46	47	48						
46	47	48	49						
47	48	49	50						
48	49	50	51						
49	50	51	52						
50	51	52	53						

After the transition period, which ends August 31, 2022, FEPs will no longer be able to select extension begin dates.

For individuals disenrolled from W-2 prior to November 1, 2021, with extension approvals already in place, WWP will:

- Set the extension end date to October 31, 2021; or
- Delete the extension if scheduled to begin on or after November 1, 2021.

CARES MAINFRAME

Effective November 1, 2021, the three query-only screens AIWC, AIWO, and AIWE will be disabled. All of the time limit information on these screens is available in WWP.

FORMS AND NOTICES

TIME LIMIT APPROVAL AND DENIAL FORMS

The current W-2 Agency Time Limit Approval and Denial record forms will remain available through October 31, 2021, to document 60-month state lifetime extension decisions. These forms will continue to be used to document extension decisions, including for applicants and participants who will have their 60-month extension discussion prior to November 1, 2021.

On November 1, 2021, new versions of the W-2 Agency Time Limit Approval and Denial record forms will be available for documenting 48-month lifetime limit extensions. These forms must be used to document lifetime limit extension decisions for applicants and participants whose lifetime limit extension discussions are held beginning November 1, 2021.

- [W-2 Agency Time Limit Extension Approval Record \(DCF-F-5214-E\)](#); and
- [W-2 Agency Time Limit Extension Denial Record \(DCF-F-5215-E\)](#).

NOTICES

From November 1, 2021, through August 31, 2022, the following text will be added to the CARES-generated participant notices and letters mentioned above:

"The W-2 lifetime limit is changing from 60 months to 48 months starting in November 2021. In November 2021, if you leave W-2 and apply again, you will have a 48-month lifetime limit when you reapply. If you stay in W-2, you may have until September 2022 before your lifetime limit changes. In September 2022, everyone who has received cash assistance in W-2, or another state for 48 or more months will not be eligible for W-2 unless they can get an extension for more time."

Additional updates were made to accurately reflect current policy that provides the six-month extension length.

REPORTS

REPORT IDENTIFYING CASES THAT NEED TO BE EVALUATED FOR 48 MONTH EXTENSIONS

DCF developed a report to help agencies determine which participants on their caseload will need to be evaluated for a 48-month extension due to the resetting of the 48-month state time limits. The report will run daily from November 1, 2021, through August 31, 2022. Below is an example of the report.

W-2 State Time Limit Extension Due Flag	CSJ Months Used / Max	TEMP Months Used / Max	W-2 T Months Used / Max	W-2 State Months Used / 60 Max (>=53)	W-2 State Months Used/48 Max (42-48)	W-2 State Months Used/52 Max (49-52)
N	24 / 30	0 / 24	0 / 24	26 / 60	26 / 60	26 / 60
Y	35 / 41	0 / 24	8 / 24	43 / 60	43 / 60	43 / 60
Y	38 / 44	0 / 24	113 / 119	166 / 172	166 / 172	166 / 172
Y	53 / 59	0 / 24	39 / 45	121 / 127	121 / 127	121 / 127
Y	77 / 83	0 / 24	42 / 48	124 / 130	124 / 130	124 / 130
Y	35 / 41	0 / 24	11 / 24	53 / 60	53 / 60	53 / 60
N	18 / 24	0 / 24	18 / 24	36 / 60	36 / 60	36 / 60
Y	45 / 51	0 / 24	15 / 24	78 / 84	78 / 84	78 / 84
Y	70 / 76	0 / 24	10 / 24	104 / 110	104 / 110	104 / 110
Y	35 / 41	0 / 24	41 / 47	95 / 101	95 / 101	95 / 101
Y	41 / 47	0 / 24	0 / 24	52 / 60	52 / 60	52 / 60
N	24 / 30	0 / 24	0 / 24	24 / 60	24 / 60	24 / 60
Y	40 / 46	0 / 24	2 / 24	43 / 60	43 / 60	43 / 60
N	38 / 44	0 / 24	0 / 24	38 / 60	38 / 60	38 / 60
N	3 / 24	0 / 24	18 / 24	21 / 60	21 / 60	21 / 60
Y	37 / 43	0 / 24	148 / 154	224 / 230	224 / 230	224 / 230
Y	22 / 29	0 / 24	96 / 102	126 / 132	126 / 132	126 / 132
Y	52 / 58	0 / 24	61 / 67	136 / 142	136 / 142	136 / 142

Current Months Used:

- **Y/N flags** indicate if an extension is needed for the W-2 State Lifetime Limit. The time limit requiring an extension will be highlighted in yellow.
- **End month of the furthest reaching approved extension in WWP:** If an extension has been entered in WWP, but not yet applied to the maximum months by the end of month batch process, the End Month will be highlighted in green in this WebI report. This will display as green until the end of month batch process applies the extension to the appropriate time limit.

- **Input Controls:** This report utilizes input controls to assist W-2 agency staff in narrowing the focus of the report. Users can use the input controls to filter on agency, region, county, office or FEP ID.

After the transition period ends on September 1, 2022, this temporary report will be archived. A modified version of this report will be available to agencies that reflect the 48-Month Time Limit. The update will remove columns only used during the transition period.

Two new reports will be created:

- Monitoring Report 01: Expiring Time Limits – 48 Month Transition Report (Available November 1, 2021)
- Monitoring Report 01: Expiring 48 Month Time Limits (Available September 1, 2022)

The following existing time limit monitoring reports will be replaced by the new reports and archived:

- Monitoring Report 01: Expiring Time Limits (This report shows expiring 60-month limits)
- W-2 Participants with 24 or More Months on 24 Month Clock without Extension Request
- Timely Entry of 24 OR 60 Month Extension Requests Weekly Due Report (These Cases May Need 24- OR 60-Month Extension Requests)

TRAINING

The Partner Training Team created a Computer Based Training (CBT) specific for the Time Limit transition from 60 to 48 months. The CBT will be available in the Learning Center one month before the transition start date of November 1, 2021. Existing Time Limit desk aids will be updated based on the new 48-month time limit information.

AGENCY ACTION

The goal of the 48-month transition period is to ensure that all W-2 participants in need of a 48-month extension decision are able to meet with their worker in advance of the September 1, 2022, implementation date. Completing extension discussions prior to September 1, 2022, will ensure adequate notice prior to case closure in the event of a 48-month extension denial.

Agency actions for a successful transition include:

1. The agency must begin regular discussions with the participants identified on the report about the implementation of the reduced 48-month lifetime limit and how their cases will be impacted by the policy change.
2. The agency must enter an extension approval or denial decision in WWP for all ongoing participants that will not reach 60 months prior to September 1, 2022, by April 30, 2022. If the individual is reaching 60 months prior to September 1, 2022, the extension decision must be entered in WWP by month 56.

3. The agency must develop an agency-wide plan that ensures the time limit transition happens in an efficient and uniform manner and is completed by September 1, 2022; and
4. The agency must use the Webl reports created for the transition period to guide extension scheduling decisions and monitor workers' progress.

ATTACHMENTS

[W-2 Policy Manual Section 2.10](#)
[Additional Policy Manual Sections](#)
[AFDC Appendix](#)

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

DCF/DFES/BWF/LW, MO & GS