



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:	23-01				
DATE:	02/17/2023				
W-2	<input type="checkbox"/>	EA	<input checked="" 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:** *Automation Enhancements to Emergency Assistance*

**CROSS REFERENCE:** [BWF Operations Memo 20-21](#)  
[BWF Operations Memo 20-27](#)  
[BWF Operations Memo 21-07](#)  
[BWF Operations Memo 21-24](#)  
EA Policy Manual Sections [1.2.2](#), [1.2.2.1](#), [1.3.1](#), [1.3.2](#), and [4.5](#)

**EFFECTIVE DATE:** February 25, 2023

**PURPOSE**

The purpose of this operations memo is to announce:

- The availability of Emergency Assistance (EA) appointment scheduling in ACCESS; and
- Enhancement to existing EA pages and functionality in Wisconsin Work Programs (WWP).

**BACKGROUND**

As described in the cross-referenced memos, the Bureau of Working Families (BWF) has made multiple automation enhancements to support the EA program, its applicants, and its agency workers. The system and policy updates communicated in this memo align with BWF’s goal of creating more efficient worker processes and improving applicant experiences.

**POLICY**

CLIENT SCHEDULING IN ACCESS

### Current Policy

Applicants using ACCESS to complete an EA application cannot schedule an interview in ACCESS. Agencies must contact the applicant within one working day of receiving the application to continue the EA application process.

### New Policy

Effective February 25, 2023, applications submitted in ACCESS will include an option for applicants to schedule a phone interview appointment with an EA worker in ACCESS. Applicants will have this new scheduling option; however, they can continue to schedule directly with the agency if they prefer. If an applicant schedules an appointment in ACCESS, agencies do not need to contact the applicant until the scheduled appointment time. If an ACCESS applicant does not schedule an interview appointment, agencies must follow existing policy and contact the applicant within one working day of the application date to continue the application process.

In the event an applicant misses their scheduled appointment, agencies must contact the applicant to reschedule and continue the application process. Contact attempts must be varied, including phone calls, e-mail, text message, etc. over several days. Contact attempts with the applicant must be clearly documented and detailed specifically in EA comments.

Agencies must maintain their client scheduling availability in CARES Worker Web (CWW) for at least five working days into the future. The number of appointments available must be consistent with the average number of ACCESS applications.

[See attached the updated EA Manual Sections 1.2.2.1, 1.3.1, and 1.3.2.](#)

### ***ACCESS UPDATES***

Effective February 25, 2023, EA applicants will have the option to schedule interview appointments in ACCESS. EA appointment options will display for up to two working days in the future. In addition, same-day appointments will be available and display if they are at least two hours in the future. Applicants are told that they should expect appointments to last about one hour.

Comments

  
[People](#)

  
[Other Benefits](#)

  
[Assets](#)

  
[Job Income](#)

  
[Other Income](#)

  
[Bills](#)

  
[Submit](#)

**Available EA Appointments**

Please choose the best time for your agency to call you. The agency will call you at xxx-xxx-xxxx from xxx-xxx-xxxx at the time you choose. The appointment will be about 1 hour. It will be scheduled when you submit the application.

UMOS Office Phone: (414) 389-6600

Friday 09/16/2022	Monday 09/19/2022	Tuesday 09/20/2022			
	<input type="radio"/> 7:00 AM <input type="radio"/> 10:15 AM	<input type="radio"/> 7:00 AM <input type="radio"/> 10:15 AM			

None of these appointments above work for me or I do not want to do my appointment over the phone.

Your appointment will be scheduled when you sign and submit your application. To sign and submit your application, click on the "Continue" button below.

Continue

Only EA appointments that are scheduled for 60 minutes or longer on the worker’s calendar will display as an available appointment in ACCESS.

If the applicant selects “None of these appointments above work for me or I do not want to do my appointment over the phone” or there are no appointments to choose from, the applicant will be told that the agency will call them to schedule an appointment.

**Emergency Assistance (EA) Appointment**

Click below to schedule your phone interview appointment with your agency for Emergency Assistance (EA).

Schedule Appointment

Your agency details are given below.

**UMOS**  
 2701 S. Chase Avenue Suite A, , MILWAUKEE, WI, 53207  
 Phone: (414) 389-6600

⚠️ If you do not schedule your EA interview appointment online before submitting your application, your agency listed above will call you to schedule an appointment.

If the applicant schedules an EA interview appointment online through ACCESS, the assigned case worker’s calendar in CWW will be updated with the appointment.

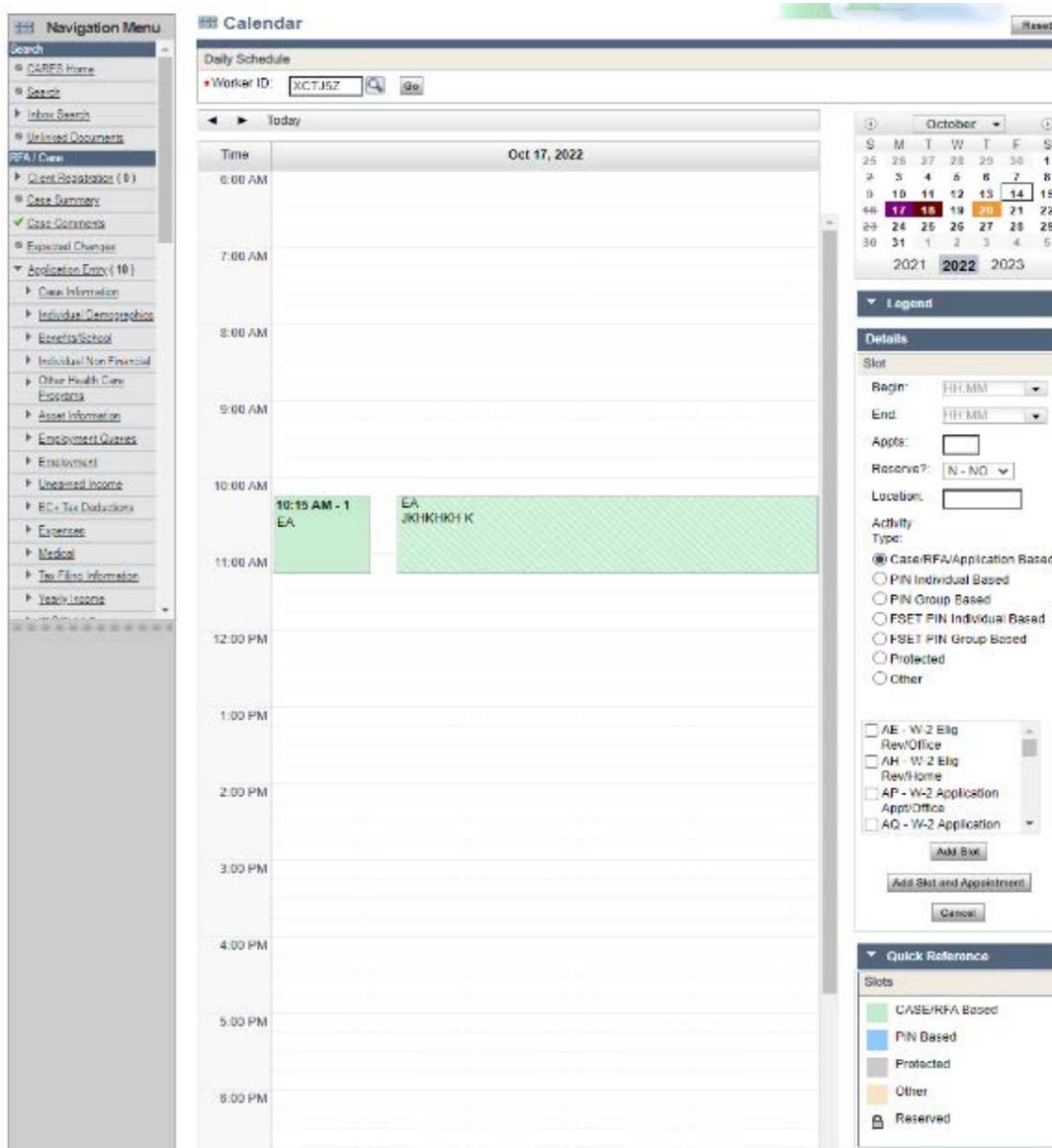
***CWW UPDATES***

***CLIENT SCHEDULING***

When an applicant schedules an EA interview appointment online, the assigned caseworker’s calendar in CWW will be updated with the appointment:

- The appointment type will be EA: “EA Application Appointment”
- The appointment will be at least 60 minutes in length.

When more than one worker is available for the appointment time, the work item will be randomly assigned to distribute the workload more evenly between workers. The following screenshot shows how ACCESS appointments (EA) will display in the CWW Calendar.



“ACCESS APP” and “ACCESS #” in appointment details indicate an appointment booked online through ACCESS.

**Navigation Menu**

Search

- CARES Home
- Search
- ▶ Inbox Search
- Unlinked Documents
- RFA / Case**
- ▶ Client Registration ( 0 )
- Case Summary
- Case Comments
- Expected Changes
- ▶ Application Entry ( 0 )
- Spousal Signature
- Generate Summary
- Initiate Eligibility Determination
- ▶ Eligibility
- ▶ Post Eligibility
- Potential Error Listing
- Confirm Eligibility
- Refer to FSET
- FS Clock
- Override AG Renewal / Review Dates
- Health Care Continuous Eligibility Tracking
- ▶ W-2 Post Eligibility
- Deductible Period and Bill Tracking Information

Cancel  Reset

### Appointment Details

**Individual Details**

Appointment Type: **Case/RFA/ACCESS**

ACCESS/Case/RFA Details or Name Only

Case

Individual: First Name  MI  Last Name  Phone

Represented By:

Programs:  FoodShare  Child Care

Status: **SC - Scheduled**

**Appointment Details**

Activity Type: **EA - Emergency Assistance Appointment** Last Updated:

Date: **01/13/2023**

Begin Time: **5:00 PM** End Time: **6:00 PM**

Worker ID: **XCTL3V** Location: **0055**

Eligibility Office: **5040** County: **40 - MILWAUKEE COUNTY**

Comments:

Current Size = 0 characters (260 characters max.)

What would you like to do?

Save and Continue

Preview the Correspondence

Transfer appointment to

Cancel appointment

Cancel  ◀ Previous Next ▶

## WWP UPDATES

The following enhancements and updates have been added to WWP:

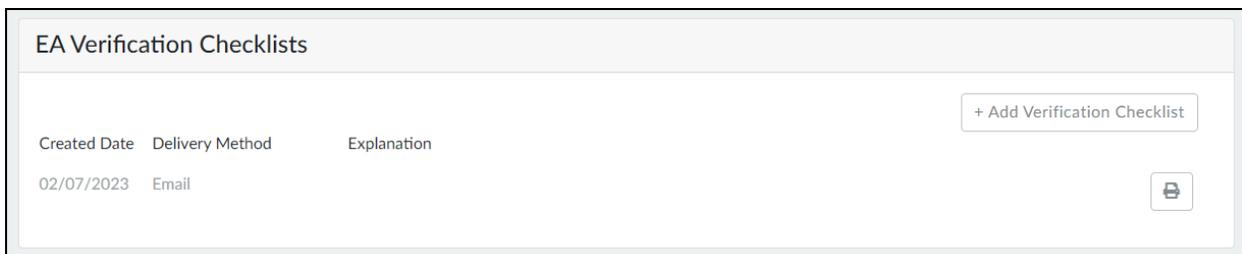
- The CARES Case # column will be renamed ACCESS Tracking # on the EA Application History page;
- The Demographics page will have new questions asking how the meeting was held and if applicants want to receive agency text messages;
- New verification drop-downs will be added to indicate how the following eligibility items were verified:
  - Wisconsin residency;
  - Date of birth;
  - Citizenship;
  - Identity (adults only);
  - Emergency type;
  - Financial crisis (when applicable); and
  - Housing confirmation (when applicable).
- On the Household Financials page, a new drop-down list will allow the worker to identify which time period was used to calculate income: prior 30 days or prospective income;
- The EA group’s income limit will be added to the Agency Summary page;

- When changing from pending to approved status, a Notification Received Date field will display on the Agency Summary page. This field should be populated with either the date confirmation from the landlord was received, or the date verification of new housing was received. WWP will display a status deadline date of five working days after the date entered; and
- Multiple In Progress and/or Pending applications will be allowed for a given applicant. Each application will have its own timeline and processing deadline.

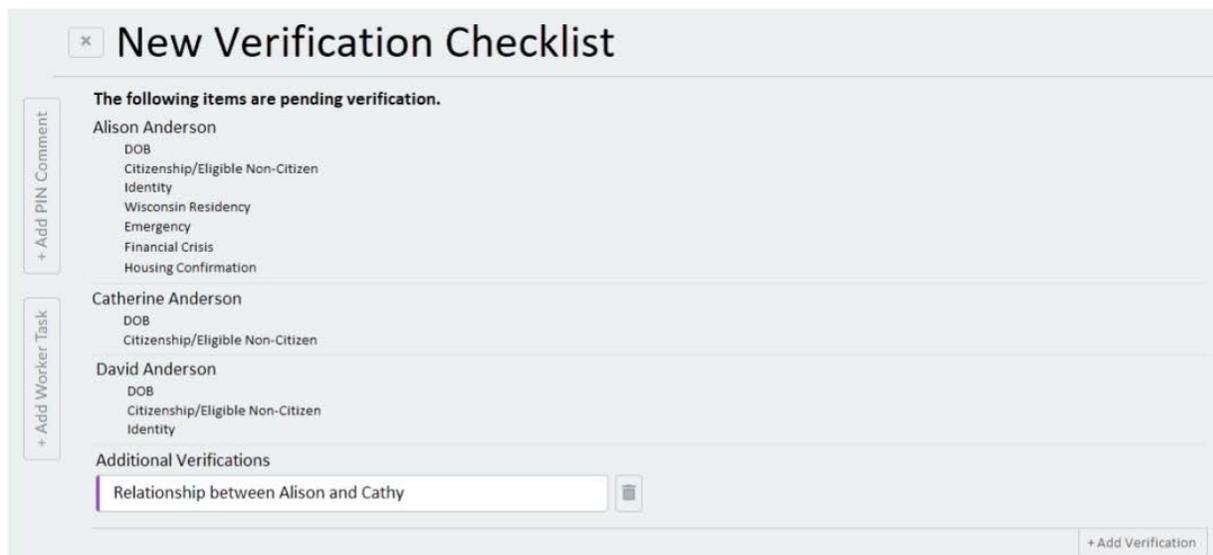
NEW VERIFICATION CHECKLIST

If “Pending Verification” is selected for any verification drop-down, a verification checklist can be created for the worker to save, view, or print. Blank verification fields will not display on the checklist.

When the “+ Add Verification Checklist” button is selected on the EA Application page, EA Verification Checklists section, WWP will open the New Verification Checklist page. The worker can select, view, and print prior checklists by selecting the print icon.



The New Verification Checklist page will display items currently pending for verification, listed by group member. A field populated by the worker will indicate how the checklist was delivered to the applicant. A free format explanation and additional notes text box will be available.



Delivery method  
Other Faxed to participant

Explanation  
Participant requested that the checklist be faxed to her neighbor, 608-555-1234.  
42 characters remaining

Any additional notes you would like to include on the checklist should be entered here.

Notes  
1000 characters remaining

Cancel Submit

The Submit button creates the new checklist and navigates the worker back to the EA Application page. Selecting the print icon from the EA verification Checklists section of the page will display the checklist in a separate window. The printed checklist will display the Submit By date, which is one working day before the application status deadline.

**Notice of Proof Needed**

To get **Emergency Assistance**, you need to turn in more proof. Please turn it in as soon as possible, but no later than the "Submit By" date listed below. This helps make sure your worker has everything they need to make an eligibility decision on your application.

Program	Submit By	Worker Contact Information
Emergency Assistance	March 31, 2023	<b>LUKE MILLIGAN</b> Phone: (608) 555-1231 Fax: Email: lukel.milligan@wisconsin.gov

To prevent the checklist PDF from downloading into the user's computer, **all users must configure their default browser settings to open PDFs in the browser rather than automatically downloading them.**

The WWP-generated checklist must not be used for confidential applications. [See EA Manual 4.5](#) for information on storing confidential documents.

## **TRAINING**

By February 17, 2023, the Partner Training Team will update the Emergency Assistance in WWP Reference Guide to reflect enhancements to existing WWP EA functionality.

All training materials are housed in the [Learning Center](#).

***REPORTS***

There will be one change to the Wisconsin Works (W-2) Agency ACCESS Report that is emailed weekly. EA Appointment details will be added to the report. There are no changes to the W-2 and Job Access Loan information that is provided in the report.

***AGENCY ACTION***

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

***ATTACHMENTS***

[EA Policy Attachment](#)

***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)

DCF/DFES/BWF/AH, JK, & GS