



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:	23-04				
DATE:	06/30/2023				
W-2	<input checked="" type="checkbox"/>	EA	<input type="checkbox"/>	CF	<input type="checkbox"/>
JAL	<input type="checkbox"/>				<input type="checkbox"/>
RAP	<input type="checkbox"/>	TMJ	<input type="checkbox"/>	TJ	<input type="checkbox"/>
Other EP	<input type="checkbox"/>				<input type="checkbox"/>

SUBJECT: *Release of the New Wisconsin Works Payment Calculator and Updates to the Overpayment Worksheet*

CROSS REFERENCE: [W-2 Manual Section 10.3 W-2 Overpayments](#)
[W-2 Manual Section 10.2.5.1 Moving Between CSJ and W-2 T Placements](#)
[BWF Operations Memo 17-21](#)
[BWF Operations Memo 21-14](#)
[Joint Operations Memo 19-J6](#)

EFFECTIVE DATE: August 1, 2023

PURPOSE

The purpose of this memo is to:

1. Announce the release of the new Wisconsin Works (W-2) Payment Calculator and updates to the Overpayment Worksheet; and
2. Clarify policy on calculating overpayments when a participant moves between a Community Service Job (CSJ) and W-2 Transition (W-2 T) placement.

BACKGROUND

As part of a continuous effort by the Bureau of Working Families (BWF) to improve administration of programs and services, the Wisconsin Work Programs (WWP) system was updated in June 2021 with new participation tracking functionality. These enhancements included automatic overpayment calculation and system-generated auxiliary payments when resulting from participation and placement changes. W-2 agency workers must still manually calculate auxiliary payments that come from other situations and enter them in WWP to be issued to participants. See [BWF Operations Memo 21-14](#) for more information on automatically calculated auxiliaries and overpayments.

BWF created the W-2 Payment Calculator to assist agencies with calculating both auxiliaries and overpayments that result from situations such as Fact Findings, Intentional Program Violations, eligibility changes, and more. This new tool is also linked to the existing W-2 Overpayment Worksheet to decrease agency workload and improve efficiency.

BWF also updated the Overpayment Worksheet to support both current policy on CSJ and W-2 T placement changes and support new policy on how to calculate overpayments for claims involving retained Child Support.

POLICY

USE OF THE W-2 PAYMENT CALCULATOR

To ensure accurate and consistent calculation of overpayments and auxiliaries, W-2 policy has been updated, effective August 1, 2023, to require agencies' use of the W-2 Payment Calculator when determining overpayments and manual auxiliaries.

[See attached the new W-2 Manual Section 10.3.1.1.](#)

CALCULATING OVERPAYMENTS WHEN MOVING BETWEEN CSJ AND W-2 T PLACEMENTS

Per W-2 Manual Section 10.2.5.1, when a participant moves between a W-2 T and a CSJ placement during a participation period, the payment is not prorated. Instead, the participant receives the payment for the placement they were in at the end of the participation period. When calculating an overpayment for a participant in this situation, W-2 agency workers should use the full payment amount of the last placement they were in.

To support this policy, the W-2 Payment Calculator includes a field that reads:

“Does this meet W-2 Policy 10.2.5.1 for CSJ or W-2 T Placement Type? If so apply the last W-2 placement type in the participation period. The W-2 payment is not prorated when the W-2 placement type switches between a CSJ or W-2 T or vice versa. Please review.”

EXAMPLE 1: Laura is in a CSJ placement for the 1/16-2/15 participation period. She discloses additional barriers to her worker on 2/14, and this discussion leads to a new placement of W-2 T. The worker does not update the placement in CWW until 2/28, after pulldown, so Laura is issued a full CSJ payment of \$653, instead of \$608 for the W-2 T placement she should have been in at end of the participation period. Laura will have an overpayment in the amount of \$45 (\$653-608) because payments are not prorated when changing between a CSJ and W-2 T.

[See attached the new W-2 Manual Section 10.3.1.1.](#)

INCLUDING RETAINED CHILD SUPPORT IN OVERPAYMENT CALCULATION

The W-2 Payment Calculator includes a "Child Support Retained" field where W-2 agency workers can indicate how much Child Support was retained during the overpayment period. For more information about the new policy on this topic, please see [BWF Operations Memo 23-05](#).

USING THE W-2 PAYMENT CALCULATOR AND OVERPAYMENT WORKSHEET

The [W-2 Payment Calculator and Overpayment Worksheet form \(DCF-F-5223-E\)](#) combines the new W-2 Payment Calculator and the existing W-2 Overpayment Worksheet into one fillable Excel Workbook. W-2 agency workers should download and use this tool when determining a W-2 auxiliary payment, or when creating overpayment claims that occurred from 2013 to present. BWF will publish a revised fillable form annually with the latest Federal Poverty Level (FPL) information.

Filling out the W-2 Payment Calculator and Overpayment Worksheet does not mean the overpayment claim itself is completed and entered in the system. To complete an overpayment, W-2 agency workers must:

1. Fill in the Benefit Recovery W-2 Worksheet (BVWW) in CARES Mainframe so it can be included with the Overpayment Notice sent to participants; and
2. Upload the completed W-2 Payment Calculator and Overpayment Worksheet into the Electronic Case File (ECF) as documentation.

It is also best practice to upload the completed tool into the Benefit Recovery and Investigation Tracking System (BRITS) as well, but it is not required.

NOTE: With the implementation of BRITS Phase 2, completion of BVWW will no longer be required and W-2 agency workers will be required to enter the overpayment fully in BRITS instead, including uploading the W-2 Payment Calculator and Overpayment Worksheet. Additional guidance will be issued when this new functionality is implemented in BRITS.

The [W-2 Payment Calculator and Overpayment Worksheet form \(DCF-F-5223-E\)](#) contains five tabs:

- Directions
- W-2 Payment Calculator - Do Not Print
- W-2 Overpayment Worksheet - Print
- W-2 Overpayment Worksheet - Unlink
- W-2 Future Cost Savings Calc - Manual

DIRECTIONS

This tab gives detailed descriptions of each of the fields in the Payment Calculator, Overpayment Worksheet, and Future Cost Savings Calculator, and states whether that field is linked to the W-2 Overpayment Worksheet.

W-2 Payment Calculator

The W-2 Payment Calculator tab is a tool used to determine both W-2 overpayments and auxiliary payments for one to twelve months for years 2013 to present. Data entered in the W-2 Payment Calculator tab will automatically transfer over to the W-2 Overpayment Worksheet tab to aid in the final calculation.

W-2 Overpayment Worksheet-Print

The W-2 Overpayment Worksheet is where all the information collected in the payment calculator tab is used to compute a final overpayment (or auxiliary) amount.

W-2 Overpayment Worksheet-Unlink

This version of the Overpayment Worksheet is not linked to the payment calculator so the information entered there will not automatically transfer over to this worksheet.

W-2 Future Cost Savings Calc-Manual

The W-2 Future Cost Savings Calculator is where the W-2 agency worker puts information about the overpayment that allows them to determine the Future Cost Savings. For more information on Future Cost Savings, please see [Joint Operations Memo 19-J6](#).

TRAINING

The Partner Training Team has updated the W-2 Overpayment and Auxiliaries: Calculations and Actions computer-based training to reflect the new W-2 Payment Calculator and changes made to the Overpayment Worksheet. BWF will provide a brief demonstration of the new W-2 Payment Calculator to W-2 agencies shortly after the publication of this memo.

A more in-depth training on the W-2 Payment Calculator and Overpayment Worksheet is in development. This training is for W-2 agency workers that calculate overpayments on a regular basis and will use the new tool often.

AGENCY ACTION

W-2 agencies must familiarize staff with the new W-2 Payment Calculator and Overpayment Worksheet and its required use. W-2 agencies must update any relevant local agency processes.

ATTACHMENTS

[Wisconsin Works \(W-2\) Payment Calculator and Overpayment Worksheet form \(DCF-F-5223-E\) W-2 Policy Attachment](#)

CONTACTS

For W-2 Policy Questions: [BWF Policy Question SharePoint](#)

For W-2, CARES and BRITS Functionality Questions: BWF Work Programs Help Desk
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