



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:	25-03				
DATE:	02/04/2025				
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	<input type="checkbox"/>	EP	<input type="checkbox"/>		<input type="checkbox"/>

SUBJECT: *Statewide Expansion of W-2 Case Transfers: Updates to Policy and Process*

CROSS REFERENCE: [W-2 Manual Section 4.6.1](#)
[W-2 Manual Section 4.6.2](#)
[W-2 Manual Section 4.6.3](#)
[BWF Operations Memo 12-65](#)

EFFECTIVE DATE: February 24, 2025

PURPOSE

The purpose of this memo is to announce updated policy and process allowing for Wisconsin Works (W-2) cases to be transferred statewide.

BACKGROUND

W-2 participants who relocate from one area of the state to another reestablish services with the W-2 agency that serves their new geographical area. Currently, only W-2 participants who relocate within Milwaukee County can have their case transferred. W-2 participants who relocate either within the balance of state, or in and out of Milwaukee County cannot have their case transferred and must reapply at the W-2 agency in their new area.

The Bureau of Working Families (BWF) is updating policy, process, and automation to allow for W-2 participants to transfer statewide without needing to reapply at the new W-2 agency.

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 highlighted light grey, and policy that is added is highlighted yellow.

CURRENT POLICY

W-2 Manual Section 4.6.1 requires that participants moving in or out of Milwaukee County or elsewhere in the Balance of State (BOS) must reapply at the agency serving their new W-2 geographical service area. The outgoing agency must end the placement in CWW, close the Employability Plan (EP), and disenroll the participant from WWP. The incoming agency in the participant's new W-2 service area must treat the individual as a new applicant.

Per W-2 Manual Section 4.6.2, when relocating within Milwaukee County, the participant's case can be transferred to the W-2 agency that serves their new address and they do not need to reapply. The participant must remain in their existing W-2 placement and all assigned activities until they have completed an informal assessment with the new agency. The new W-2 agency must meet with the participant within 10 working days of the date of transfer to conduct the informal assessment.

NEW POLICY

Effective February 22, 2025, W-2 participants can relocate and have their W-2 case transferred to a new W-2 agency anywhere within the state. The sending W-2 agency initiates the transfer process and is responsible for notifying the participant. The receiving W-2 agency must meet with the participant within 10 working days of the date of transfer to conduct the informal assessment and update the EP.

Transfer Exceptions

[BWF Operations Memo 12-65](#) outlined exceptions to current case transfer policy allowing W-2 participants experiencing homelessness or domestic violence the option to receive W-2 services from a different agency than the one that serves their geographical area. As part of this policy update, these exceptions have been added to the W-2 Manual.

Nonparticipation During the Transfer Process

With this update to allow W-2 cases to be transferred statewide, all placements, EPs, and assigned activities will remain open and active during the transfer process. Many W-2 participants assigned in-person activities such as a work experience will be unable to complete these activities during the moving and transfer process. The sending W-2 agency must provide good cause for all nonparticipation in the time period between the transfer initiation and the first appointment with the receiving agency and document the rationale in PIN comments. W-2 agencies may reference existing good cause reasons in W-2 Manual Section 11.3.3.

Case Management Follow-Up/Plus (CMF/CMF+)

New policy allowing placements to remain open during a case transfer will apply to the CMF/CMF+ placements as well.

Current policy requiring CMF/CMF+ placement closure when a participant relocates has been removed from W-2 Manual Section 4.6.1.

[See attached W-2 Manual Sections 4.6.1, 4.6.2, and 4.6.3.](#)

STATEWIDE CASE TRANSFER PROCESS GUIDE

A new process guide titled *Bureau of Working Families (BWF) W-2 Program Case Transfer Process Guide* has been created and is attached to this memo. This guide details the W-2 agency's responsibility throughout the transfer process and includes steps for initiating and completing the transfer in Cares Worker Web (CWW) and Wisconsin Work Programs (WWP). This process guide obsoletes and replaces the current Inter-Regional Transfer Procedure for Milwaukee W-2 Agencies. The process guide will be available in the Appendix of the W-2 Manual effective February 22.

CARES WORKER WEB (CWW) AND WISCONSIN WORK PROGRAMS (WWP)

All updates to CWW and WWP will be announced in a separate communication from the BWF Work Programs Help Desk that will be released the week of February 10, 2025.

TRAINING

A new Desk Aid titled Transfer to New Agency Process will be available in the Partner Training Learning Center one week prior to go-live.

AGENCY ACTION

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

ATTACHMENTS

[Policy Attachment](#)

[Bureau of Working Families \(BWF\) W-2 Program Case Transfer Process Guide](#)

CONTACTS

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

For W-2, CARES and WWP Functionality Questions: BWF Work Programs Help Desk
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DCF/DFES/BWF/MO