

1.5.1 W-2 Eligibility Reviews

[1.5.1.1 Conducting W-2 Eligibility Reviews Virtually](#)

[1.5.1.2 Discussing Confidentiality Situations](#)

The [W-2](#) agency is required to meet with participants to conduct a W-2 eligibility review at least once every six months. (See [1.4.2.4](#)) If a participant initiates a review early but does not schedule a review appointment in ACCESS, the participant maintains their eligibility until the initial six-month review date. The FEP must extend the verification checklist due date. Renewals initiated by participants in error should be withdrawn and a case comment created explaining why. The FEP should also create a manual notice informing the participant of the withdrawal. See [1.4.6](#) for documents needed at review.

Scheduling Appointments Through ACCESS

Before submitting a W-2 review through ACCESS, participants will be presented with the option to select an available appointment time to meet with a FEP over the next five working days. The FEP must meet with the applicant during their scheduled appointment time.

Eligibility reviews must be conducted in person or virtually by phone or video call.

Maintaining Schedule Availability

W-2 agencies must maintain their client scheduling availability for participants to renew their benefits in CWW for at least 10 working days into the future. Each FEP should make enough review appointment slots available in Client Scheduling based on their expected caseload. The amount of appointment slots for review should be periodically adjusted on an ongoing basis in order to ensure participants generally have the ability to schedule appointments.

Appointment Scheduling for ACCESS Reviews

Participants renewing in ACCESS are responsible for scheduling an interview appointment with a FEP in ACCESS or by contacting their local W-2 agency.

If a participant does not schedule an appointment or no appointment times are available in ACCESS, the W-2 agency should attempt to meet with the participant no later than seven working days after a review is submitted in ACCESS. If a meeting is not possible, the agency must schedule a future appointment that is prior to the eligibility review due date.

If a participant does not meet eligibility requirements at the review, CWW will automatically close the case at the end of the review month. Verification documents received from participants must be current. See [4.1.2](#) for more information about eligibility verification.

Sometimes, a participant may not schedule a review after initiating the eligibility renewal in ACCESS. When that happens, the FEP should follow the following processing times because a verification checklist will be automatically generated and sent to a participant.

EXAMPLE: John has an initial six-month eligibility review month in December. John initiates a review on October 26 in ACCESS but does not schedule an appointment. At the end of December, if John has not attended a six-month renewal appointment, the case must be closed.

The W-2 agency representative must schedule all appointments through Client Scheduling in CWW.

If the agency extends the VCL review time frame, agency staff must document the reason in case comments.

No changes to the remainder of the section.