

Wisconsin Works (W-2) Monitoring and Communication Access-SharePoint Desk Aid

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Overview

This desk aid provides process and procedure steps where BWF will access and exchange data and information with W-2 agencies in a more secure manner.

Access

Access to W-2 Monitoring and Communication Access SharePoint site will be granted and available through the established DCF External SharePoint site at: <https://share.dcf.wisconsin.gov/W2MonCommAccess/default.aspx>.

Submit the request via email to the DCF BWF Work Programs HelpDesk at inbox.bfwworkprogramshd@wisconsin.gov. The DCF BWF Work Programs Help Desk will send/forward their approval of the request to the DCFSERVICE@wisconsin.gov.

For DCF/ DCF contracted staff:

Provide the user's Name and Accounts domain ID (e.g. Window's Logon ID) for those who need access and provide the SharePoint link and document library access to all with read and write permissions.

Email Template:

Hello,

This is a request to grant [State or State Contracted Staff First and Last Name] access to the W-2 Monitoring and Communication Access SharePoint site at <https://share.dcf.wisconsin.gov/W2MonCommAccess/default.aspx>. They will need read and write access.

[Below is BWF Work Programs Help Desk approval to grant access.]

Thanks,
[Staff Name]

For External Partners (e.g. W-2 Agency staff):

A DWD WI Logon (WIEXT ID) and password will need to be created at <https://accounts.dwd.wisconsin.gov/> prior to accessing the DCF SharePoint site. Provide the external user's Name and WIEXT ID for those who need access and include agency document library, Resource library, and Child Support Liaison Exchange library, (if applicable).

Email Template:

Hello,

This is a request to grant external partner, [W-2 Agency/ Child Support Agency Staff First and Last Name & WIEXT ID and/or the following W-2 Agency/ Child Support Agency Staff and their WIEXT IDs] access to the [W-2 Agency [and Resource/Child Support Liaison Exchange](#)] document library within the W-2 Monitoring and Communication Access

SharePoint site at <https://share.dcf.wisconsin.gov/W2MonCommAccess/default.aspx>. They will need read and write access.

W-2 Agency Staff Name	WIEXT ID	Email Address

[Below is BWF Work Programs Help Desk approval to grant access.]

Thanks,
[Staff Name]

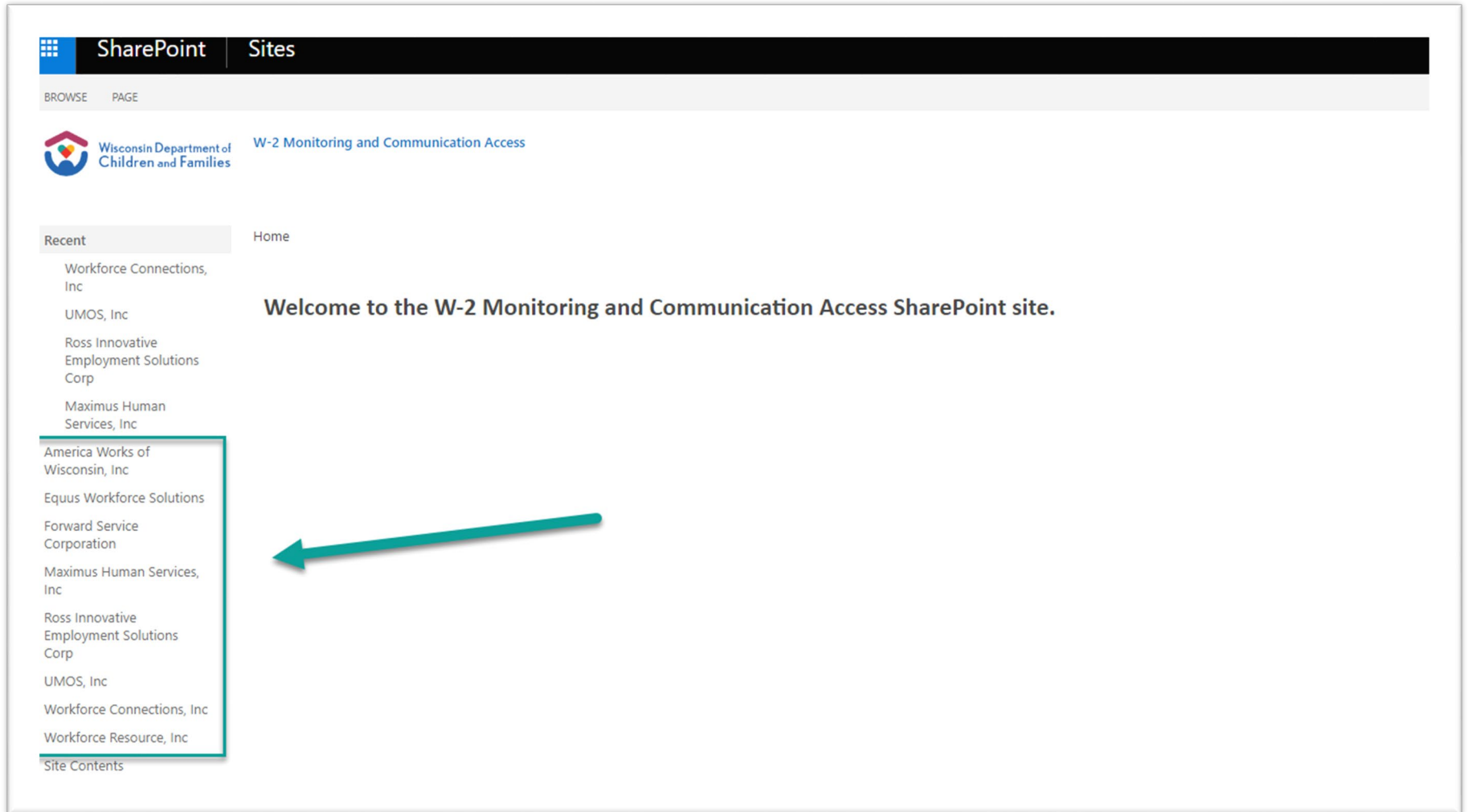
Organization & Security

The W-2 Monitoring and Communication Access SharePoint site will have ten (10) document libraries with separate permissions for each W-2 Agency, Child Support Liaison staff, and Child Support Agency to access. The W-2 Agency would only see their agency's document library, the Resource document library, and the Child Support Liaison Exchange (if applicable) when they access the main site. State and/or state contracted staff will have access to all document libraries.

Process & Procedure

Landing Page

State staff view below



W-2 Agencies will see three document libraries: their agency name, Resource, and/or Child Support Liaison Exchange folder.

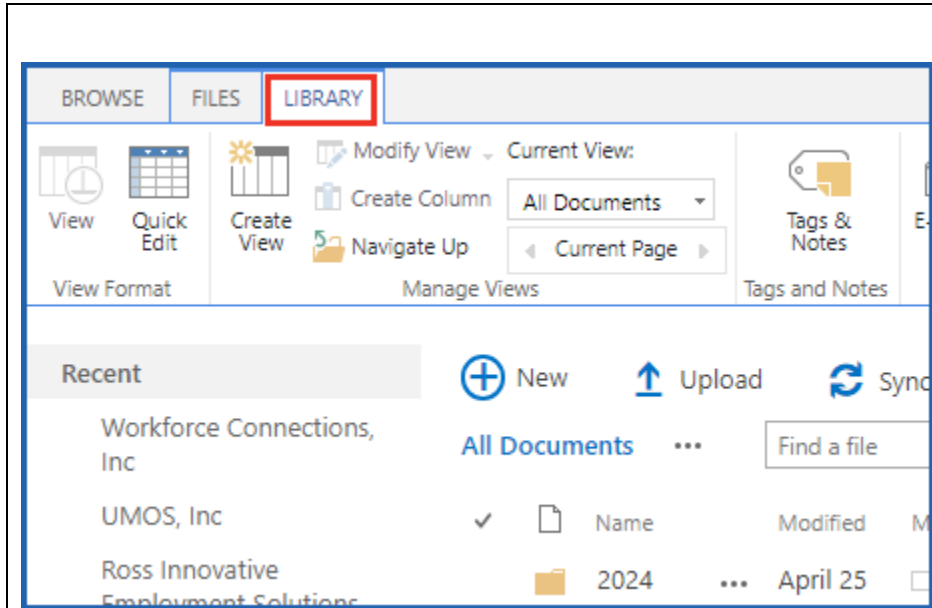
W-2 Agency folder contents, see below.

The screenshot shows a SharePoint library view with the following components:

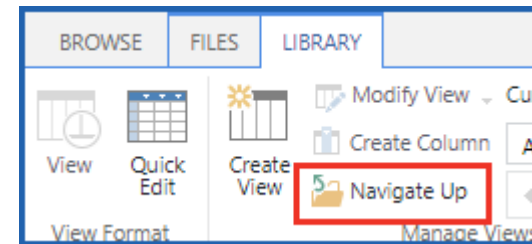
- Header:** SharePoint Sites
- Navigation:** BROWSE, FILES, LIBRARY
- Command Bar:** Includes options like View, Quick Edit, Create View, Modify View, Current View, All Documents, Current Page, Tags & Notes, E-mail a Link, Alert Me, RSS Feed, Most Popular Items, Sync, Connect to Outlook, Connect to Office, Export to Excel, Open with Explorer, Form Web Parts, Edit Library, New Quick Step, Library Settings, Shared With, and Workflow Settings.
- Recent:** A list of recent sites including Workforce Connections, Inc, UMOS, Inc, Ross Innovative Employment Solutions Corp, Maximus Human Services, Inc, **America Works of Wisconsin, Inc** (highlighted), Equus Workforce Solutions, Forward Service Corporation, Maximus Human Services, Inc, Ross Innovative Employment Solutions Corp, UMOS, Inc, Workforce Connections, Inc, and Workforce Resource, Inc.
- Actions:** New, Upload, Sync, Share, More
- Search:** Find a file
- Table:** A table listing folders with columns for Name, Modified, and Modified By.
- Footer:** Drag files here to upload

Name	Modified	Modified By
Ad Hoc Reviews	About a minute ago	Doudna, Danise - DCF
Case File Documentation (CFD)	April 16	Doudna, Danise - DCF
Child Support Liaison	Yesterday at 2:09 PM	Doudna, Danise - DCF
Child Support Non-Cooperation (CSNC)	April 16	Doudna, Danise - DCF
Comprehensive Case Reviews	April 16	Doudna, Danise - DCF
Customer Compliants	About a minute ago	Doudna, Danise - DCF
Education Navigator	Yesterday at 2:09 PM	Doudna, Danise - DCF
Eligible Child (EC)	April 16	Doudna, Danise - DCF
Emergency Assistance (EA)	April 16	Doudna, Danise - DCF
Fraud	April 16	Doudna, Danise - DCF
Job Access Loans (JALs)	April 16	Doudna, Danise - DCF
Monitoring 3.0	April 16	Doudna, Danise - DCF
PARIS	April 16	Doudna, Danise - DCF
SWICA and UIB	April 16	Doudna, Danise - DCF
Technical College (TC)	April 16	Doudna, Danise - DCF
TEMP	April 16	Doudna, Danise - DCF
Third Party Verification (TPV)	April 16	Doudna, Danise - DCF
W-2 Overpayments	April 16	Doudna, Danise - DCF

Folder Navigation



1. Select the **Library** tab from the top ribbon.

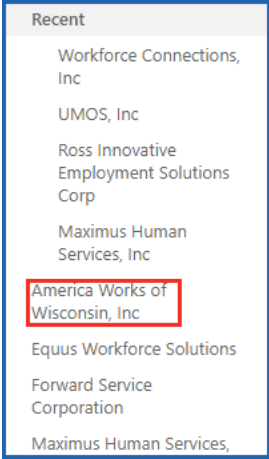
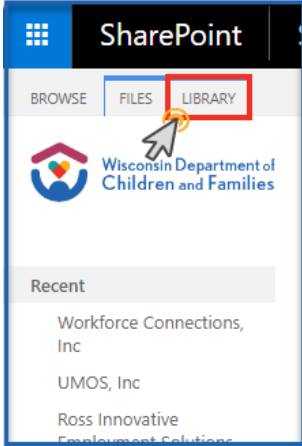
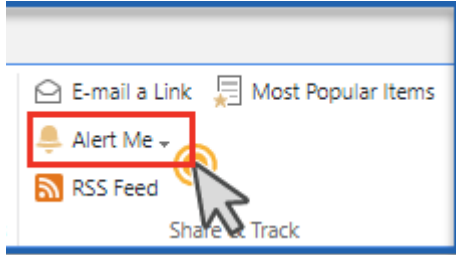

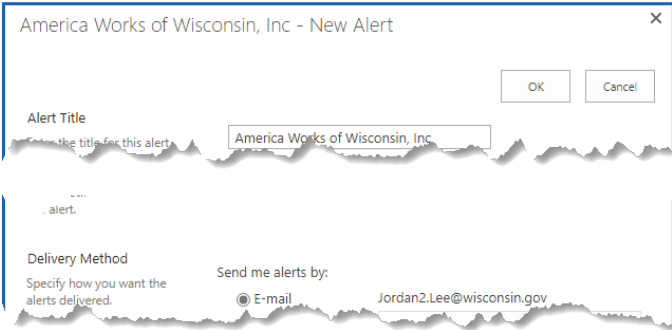
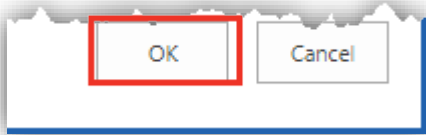


2. Select **Navigate Up** to navigate up a folder level.

Alerts

*Users may choose to either create an alert to be notified when a change is made to a Library, file or document. Alerts are not required.

Alerts: Creating an alert for a Library

 <p>1. Select a folder from the Menu.</p>	 <p>2. Select the Library tab.</p>	 <p>3. Select Alert Me.</p>
 <p>4. Select Set alert on this library from the dropdown list.</p>	 <p>5. Select the desired options for Delivery Method; Change Type; Send Alerts for These Changes; and When to Send Alerts.</p>	 <p>6. Then select OK.</p>

*It is suggested that the **Alert Title** is renamed to include the file pathway for ease of identification.

The individual who created the alert will receive an email confirmation that an alert has been successfully completed. See the example below.

File Share

Connect to this Document Library | Preview this Document Library | Delete | Reply | Reply All | Forward | Meeting | IM | More | Site Visits | To Manager | Team Email | Move | Rules | Send to OneNote | Actions | Assign Policy

Wed 5/22/2024 8:58 AM

W-2 Monitoring and Communication Access <spadmin@wisconsin.gov>

You have successfully created an alert for 'America Works of Wisconsin, Inc'

To Lee, Jordan - DCF

Cc

Retention Policy DCF Retention Policy (7 years) Expires 5/21/2031

Click above to connect to this document library.

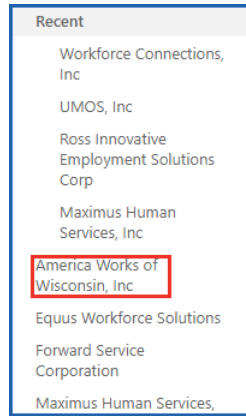
W-2 Monitoring and Communication Access - America Works of Wisconsin, Inc
SharePoint Document Library
<https://share.dcf.wisconsin.gov/W2MonCommAccess/America%20Works%20of%20Wisconsin%20Inc/>

Alert 'America Works of Wisconsin, Inc' has successfully been added on ['W-2 Monitoring and Communication Access'](#).

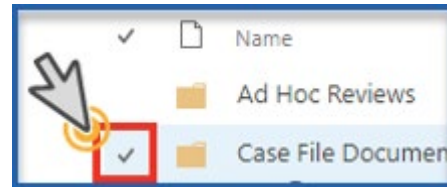
You will receive alerts according to the delivery method, timing and criteria that were selected when the alert was created.

You can change this alert or any of your other alerts on the [My Alerts on this Site](#) page.

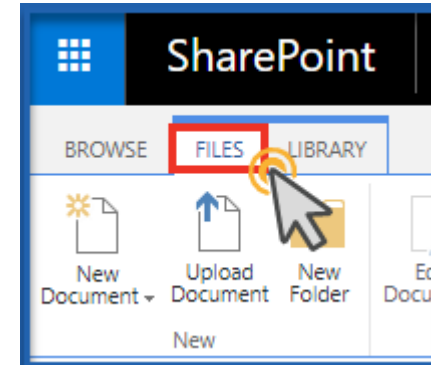
Alerts: Creating an alert for changes or modification made to a file



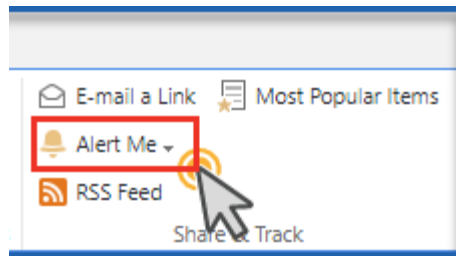
1. Select Library from the Menu on the far-left side of the screen.



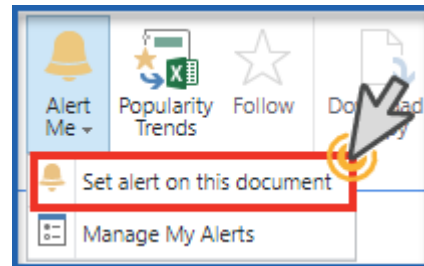
2. Select a folder.



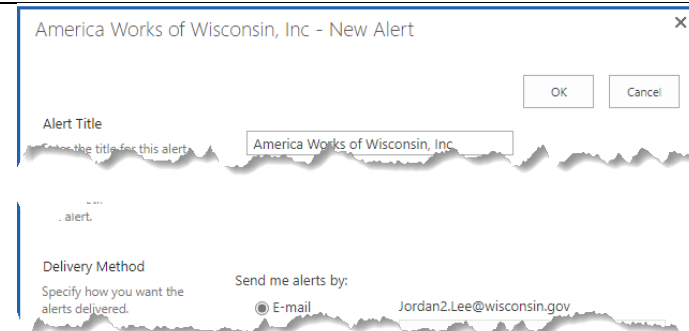
3. Select **File** from the ribbon above.



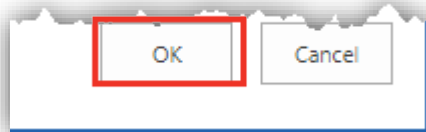
4. Select **Alert Me**.



5. Select **Set alert on this document** from the dropdown menu.



6. Select the desired options for **Delivery Method**; **Change Type**; **Send Alerts for These Changes**; and **When to Send Alerts**.



7. Then select **OK**.

*It is suggested that the **Alert Title** is renamed to include the file pathway for ease of identification.

The individual who created the alert will receive an email confirmation that an alert has been successfully completed. See the example below.

Wed 5/22/2024 12:42 PM

W-2 Monitoring and Communication Access <spadmin@wisconsin.gov>

You have successfully created an alert for 'America Works of Wisconsin, Inc: Case File Documentation (CFD)'

To: Lee, Jordan - DCF

Cc: Retention Policy DCF Retention Policy (7 years) Expires 5/21/2031

Click above to connect to this document library.

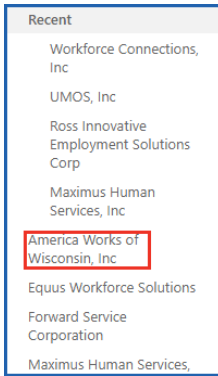
W-2 Monitoring and Communication Access - America Works of Wisconsin, Inc
SharePoint Document Library
<https://share.dcf.wisconsin.gov/W2MonCommAccess/America%20Works%20of%20Wisconsin%20Inc/>

Alert 'America Works of Wisconsin, Inc: Case File Documentation (CFD)' has successfully been added on ['W-2 Monitoring and Communication Access'](#).

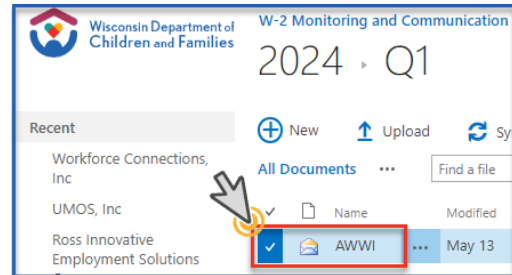
You will receive alerts according to the delivery method, timing and criteria that were selected when the alert was created.

You can change this alert or any of your other alerts on the [My Alerts on this Site](#) page.

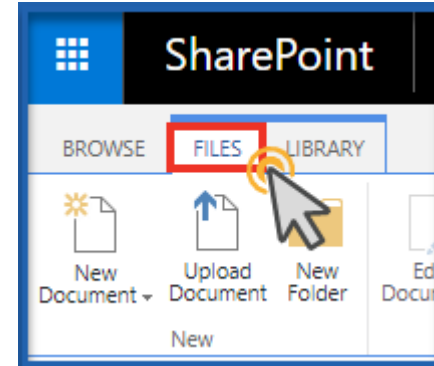
Alerts: Create an alert for a specific document



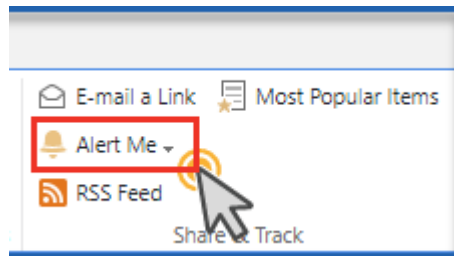
1. Select **Library** from the Menu on the far-left side of the screen.



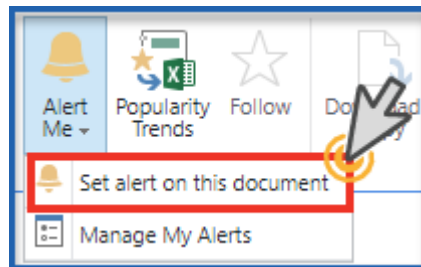
2. Select a document.



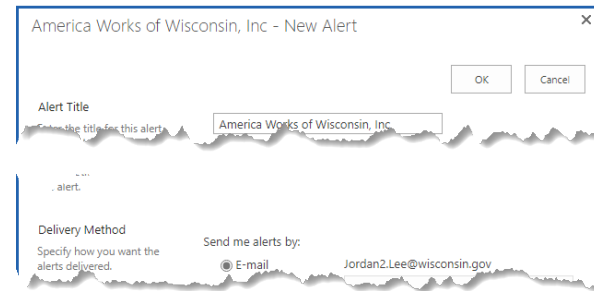
3. Select **File** from the ribbon above.



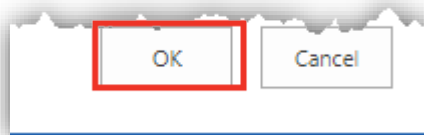
4. Select **Alert Me**.



5. Select **Set alert on this document** from the dropdown menu.



6. Select the desired options for **Delivery Method**; **Change Type**; **Send Alerts for These Changes**; and **When to Send Alerts**.



7. Then select **OK**.

*It is suggested that the **Alert Title** is renamed to include the file pathway for ease of identification.

The individual who created the alert will receive an email confirmation that an alert has been successfully completed. See the example below.

Wed 5/22/2024 2:25 PM

W-2 Monitoring and Communication Access <spadmin@wisconsin.gov>

You have successfully created an alert for 'Q1 2024 AWWI CSNC Monitoring Final NL.xlsx'

To: Lee, Jordan - DCF

Cc: Retention Policy DCF Retention Policy (7 years) Expires 5/21/2031

Click above to connect to this document library.

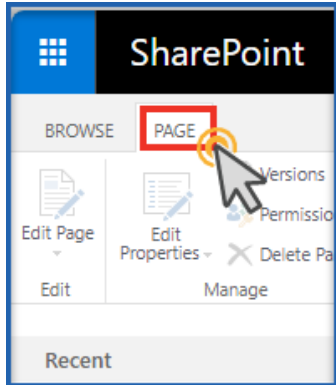
W-2 Monitoring and Communication Access - America Works of Wisconsin, Inc
SharePoint Document Library
<https://share.dcf.wisconsin.gov/W2MonCommAccess/America%20Works%20of%20Wisconsin%20Inc/>

Alert 'Q1 2024 AWWI CSNC Monitoring Final NL.xlsx' has successfully been added on '[W-2 Monitoring and Communication Access!](#)'.

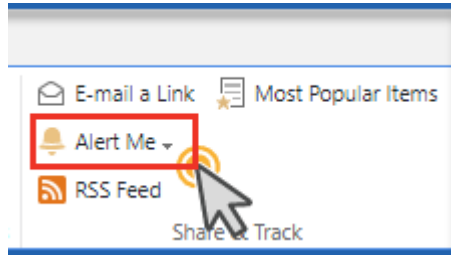
You will receive alerts according to the delivery method, timing and criteria that were selected when the alert was created.

You can change this alert or any of your other alerts on the [My Alerts on this Site](#) page.

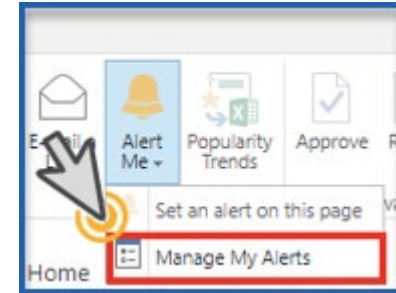
Alerts: Delete an alert



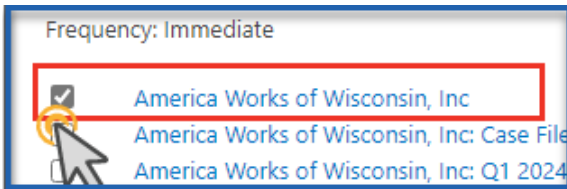
1. Select **Page** tab from the top ribbon.



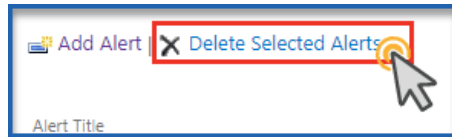
2. Select **Alert Me**.



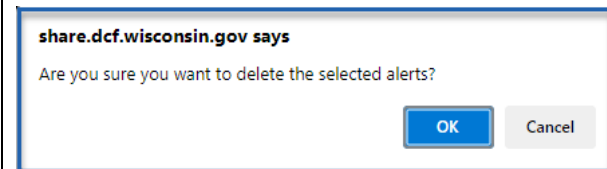
3. Select **Manage My Alerts** from the dropdown list.



4. Once on the **My Alerts on this Site** page; select the desired alerts.



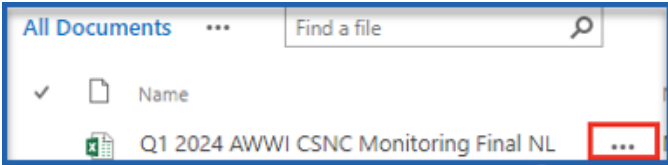
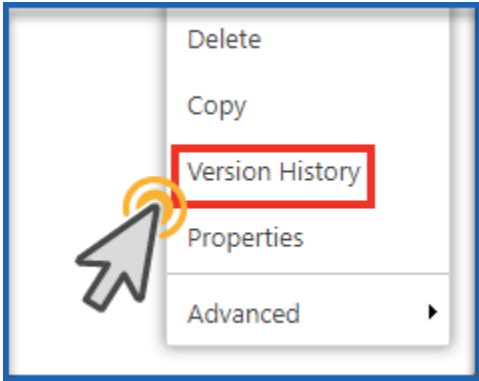
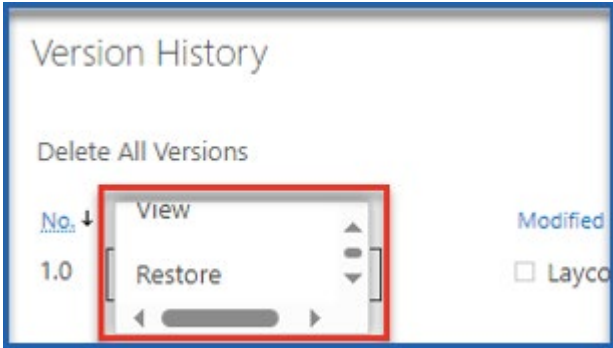
5. Select **Delete Selected Alerts**.



6. A soft warning will appear. Ensure that you are certain before proceeding with deleting the alert. If so, select **OK**.

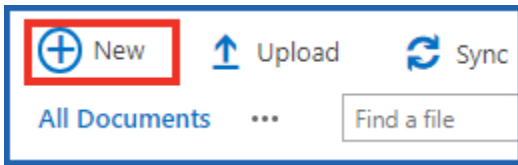
The individual who deletes an alert from their list will receive an email confirmation that an alert has been successfully deleted.

View Version History

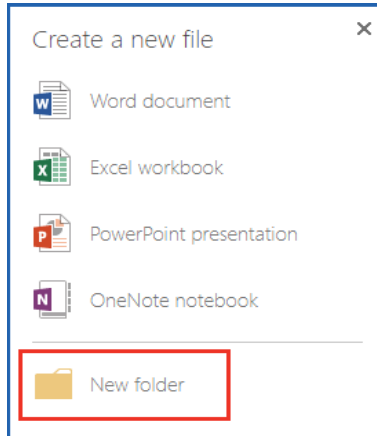
 <p>1. Navigate to the document. Right click on the ellipsis next to the file name.</p>	 <p>2. Select Version History from the menu.</p>	 <p>3. A list of versions of the document will display. Select the version you want to view or restore. Depending on what you chose, you will either be taken to the document, or a previous version will be restored.</p>
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Create a Folder

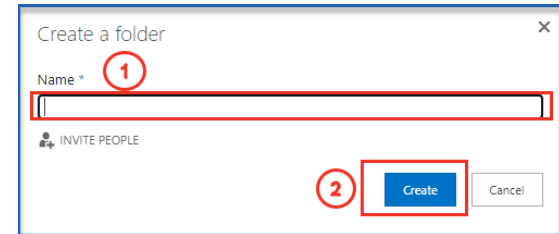
*** State Staff Only ***



1. Navigate to the desired Library or Folder a folder will be created in, then select **+ New**.

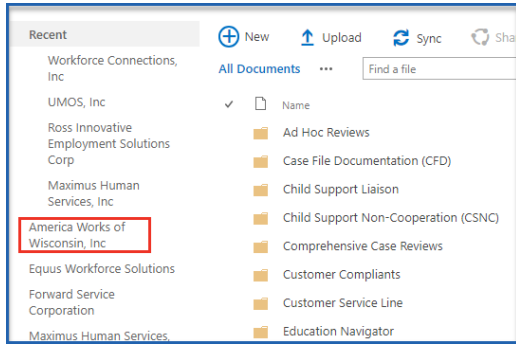


2. From the list, select **New folder**.

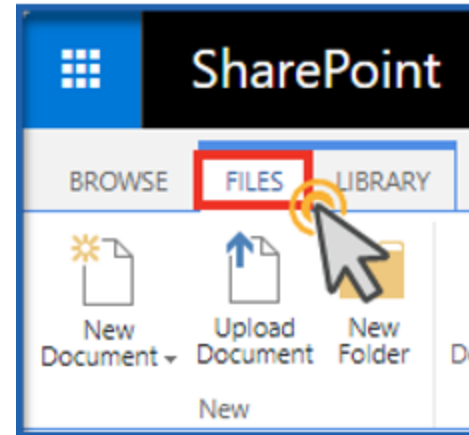


3. A prompt will appear. Name the folder, then select **Create** to add the new folder to the list.

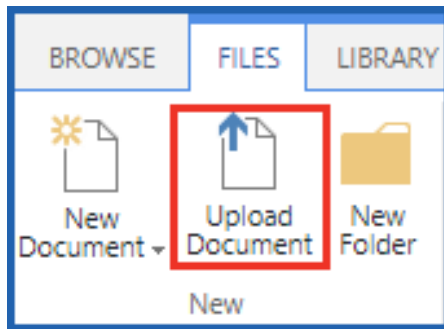
Save a document to a SharePoint Library



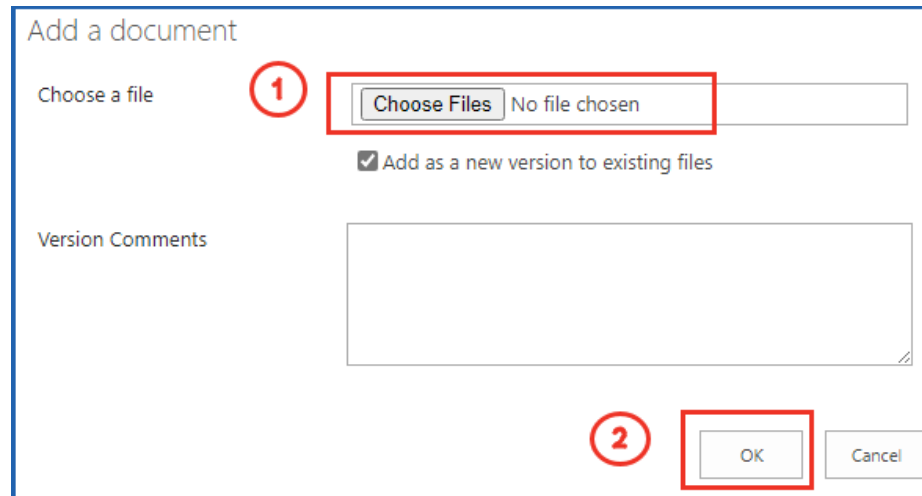
1. Navigate to the Library or file where a new document will be saved.



2. Select the **File** tab from the top ribbon.

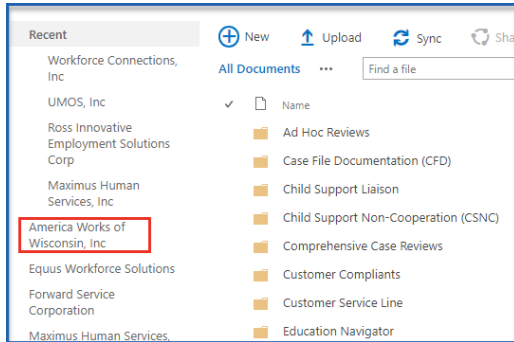


3. Select **Upload Document**.

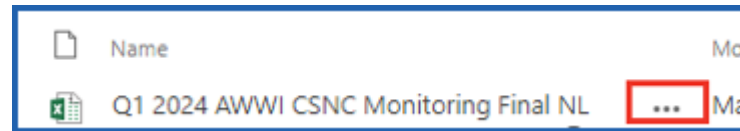


4. From the prompt, choose a file and select **OK** to upload and save the document.

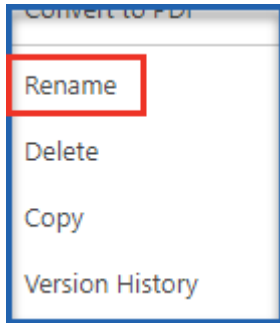
Rename a document, folder, or link in a document library



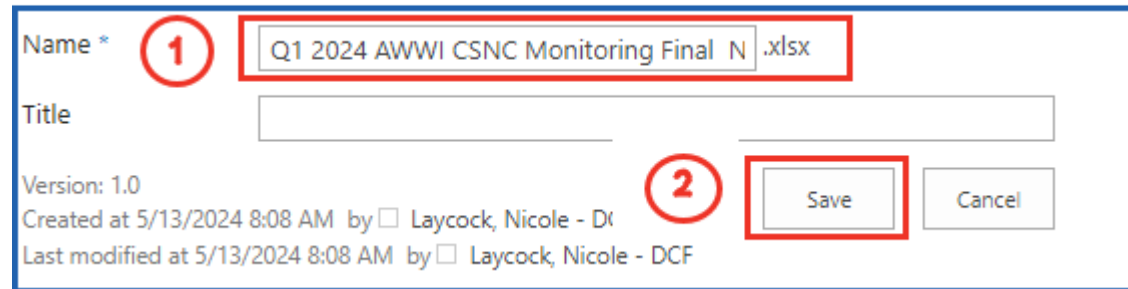
1. Navigate to the Library or file where the document to be renamed is located.



2. Hover the cursor over the desired file to be renamed; then right click on the ellipses.

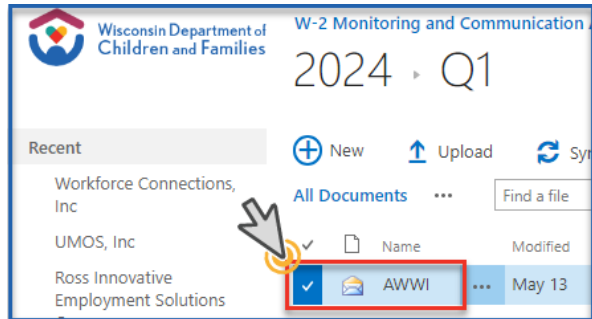


3. Select **Rename** from the list.

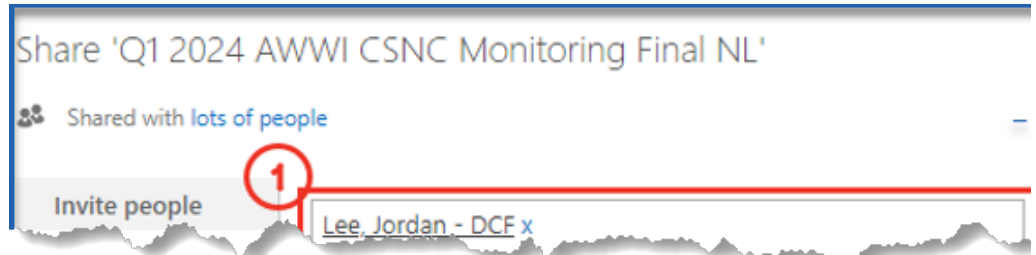


4. From the prompt, rename file and then select **Save**.

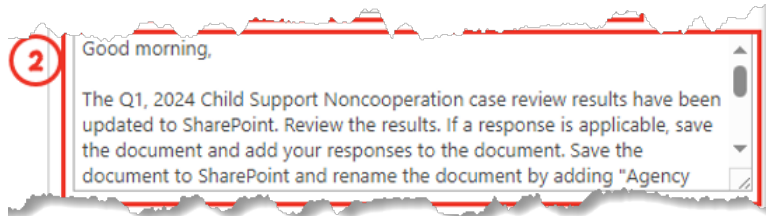
Share a file or document



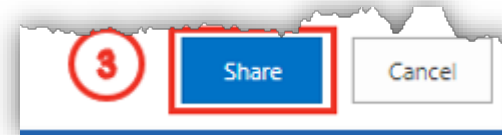
1. Navigate to the desired file or document.



2. From the prompt enter the emails of the individual the file or document will be shared with.




3. In the prompt enter the desired communication.



4. Then select "Share".

The email recipient(s) will receive a message of the shared document and a link. See the example below.

Lee, Jordan - DCF has shared 'Q1 2024 AWWI CSNC Monitoring Final NL'

 Lee, Jordan - DCF <Jordan2.Lee@wisconsin.gov>
To Lee, Jordan - DCF
Cc Lee, Jordan - DCF
Retention Policy DCF Retention Policy (7 years)

Good morning,

The Q1, 2024 Child Support Noncooperation case review results have been updated to SharePoint. Review the results. If a response is applicable, save the document and add your responses to the document. Save the document to SharePoint and rename the document by adding "Agency Response" to the end of the file name.

Agency responses are due to DCF by May 28, 2024, if applicable.

Jordan Lee

Open [Q1 2024 AWWI CSNC Monitoring Final NL.xlsx](#)

[Follow this document to get updates in your newsfeed](#)

Note

Encrypted Documents

SharePoint cannot process encrypted files in some instances. Documents that are encrypted may not open or have restricted usage in SharePoint.

Repository

SharePoint does not have a repository. It is recommended that the document is saved elsewhere and shared in SharePoint.

Recommended Web Browser

SharePoint is supported by many of common web browsers such as Chrome and Edge. We recommend using Microsoft Edge since no further permission is needed.