Applying for W-2 Entry Guide – Part One

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W-2 Contact Information

Questions regarding this training material should be directed via your local agency process to the Partner Training Team,

Email: PTTTrainingSupp@wisconsin.gov

A contact person is available to answer e-mailed questions related to this training material, assist you in completing any activity that you are having difficulty with, and/or provide explanation of anything else about this training material.

Questions regarding W-2 production cases and systems should be directed via your local agency process to the BWF Work Programs Help Desk at:

Email: <u>bwfworkprogramshd@wisconsin.gov</u>

Telephone: (608) 422-7900.

W-2 Policy questions should be directed to your Regional Office staff.

DCF is an equal opportunity employer and service provider. If you have a disability and need information in an alternate format, or need it translated to another language, please contact (608) 535-3665 or the Wisconsin Relay Service (WRS) – 711.

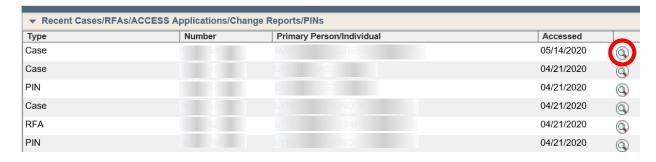
For civil rights questions call (608) 422-6889 or the Wisconsin Relay Service (WRS) – 711.

Ana

You're meeting in person with Ana for the application appointment. Before you can start making entries, you'll log into the CWW Training Environment and pull up Ana's RFA.

> **Step 1:** Log on to CWW Training. The **CARES Worker Web Home** page displays.

CARES Worker Web Home



Or



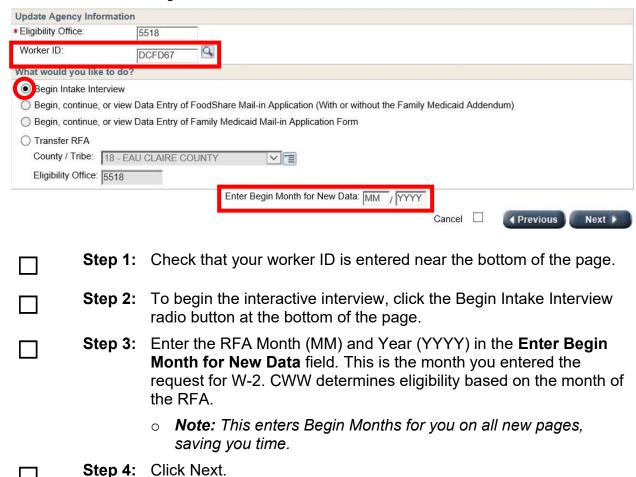
CARES Worker Web Home

Step 2: Locate your Ana case on the Recent Cases list. Select your Ana case by clicking on the magnifying glass icon in the row to navigate to her **RFA Summary** page.

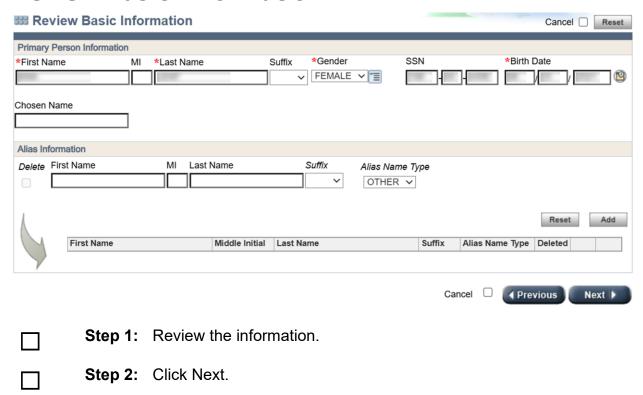
Or

Use the **Quick Select** field at the top of the page. Select CASE/RFA, enter Ana's RFA Number, and click Go.

RFA Summary

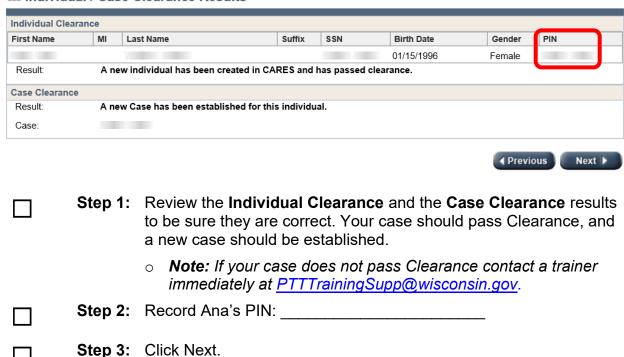


Review Basic Information

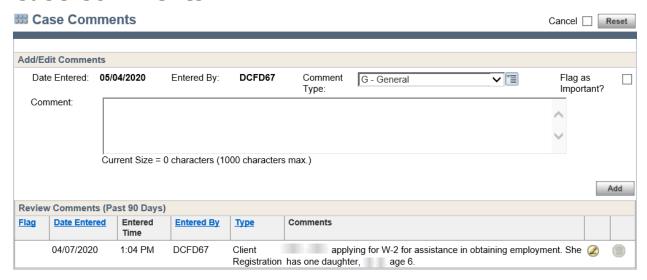


Individual/Case Clearance Results

Individual / Case Clearance Results



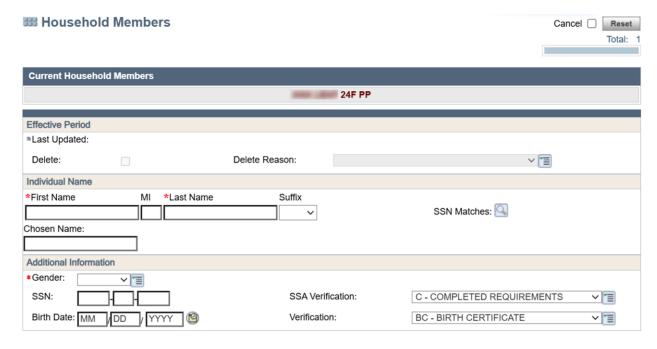
Case Comments



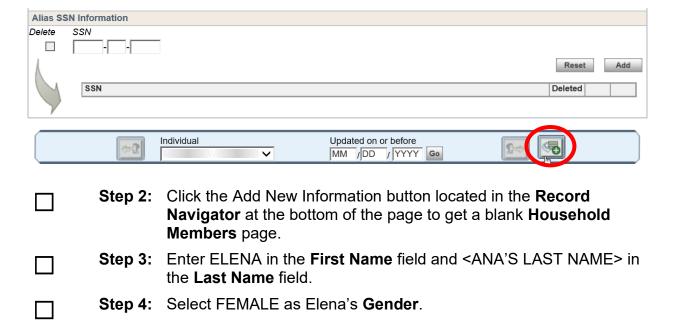
Step 1: You are now on the Case Comments page. You should see only the RFA comment. You do not need to add any comments at this time. Click Next.

Household Members

Ana lives with Elena, her six-year-old daughter. Ana has their birth certificates with her at the appointment. She also provides you with their Social Security numbers.



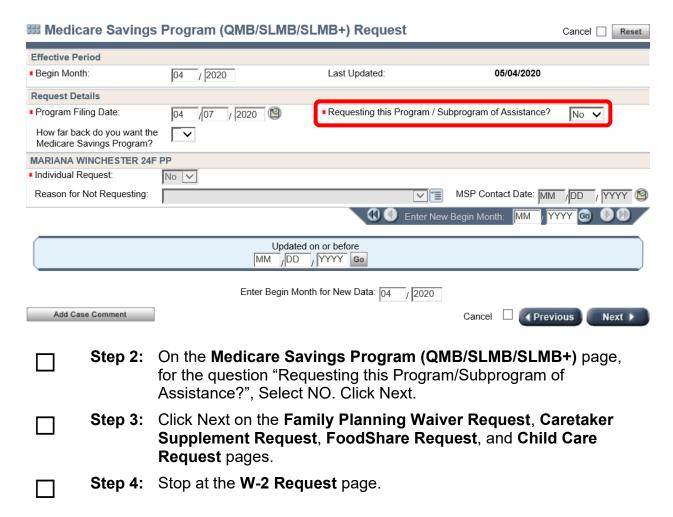
Step 1: Enter **Verification** of Ana's **Birth Date**. Use BC – BIRTH CERTIFICATE



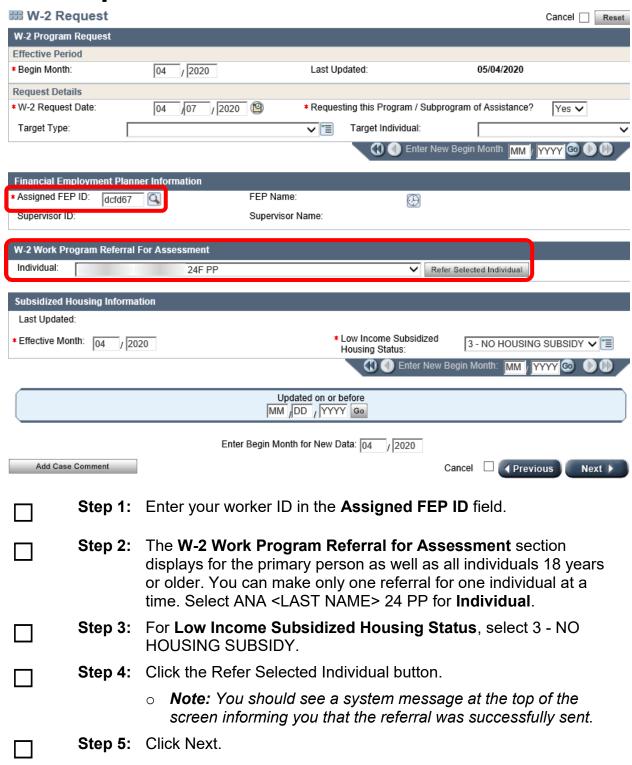
Step 5:	Ana provides Elena's SSN. Select C – COMPLETED REQUIREMENTS as the SSA Verification .	
	 Note: Do not use sequential numbers (111-11-1111) or patterns (232-32-3232); use random numbers. 	
Step 6:	Enter a Birth Date that makes Elena 6 years old. Verification is BC – BIRTH CERTIFICATE.	
Step 7:	Click Next.	

Program Requests

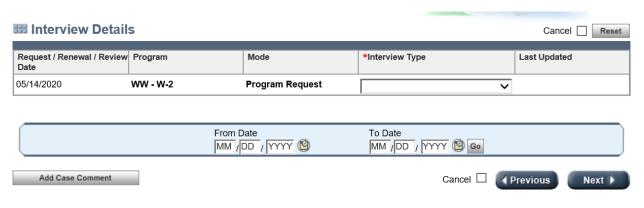
Step 1: There is a separate **Program Request** page for each program of assistance. Click Next on the **Health Care Request** and **Katie Beckett Medicaid Request** pages.



W-2 Request

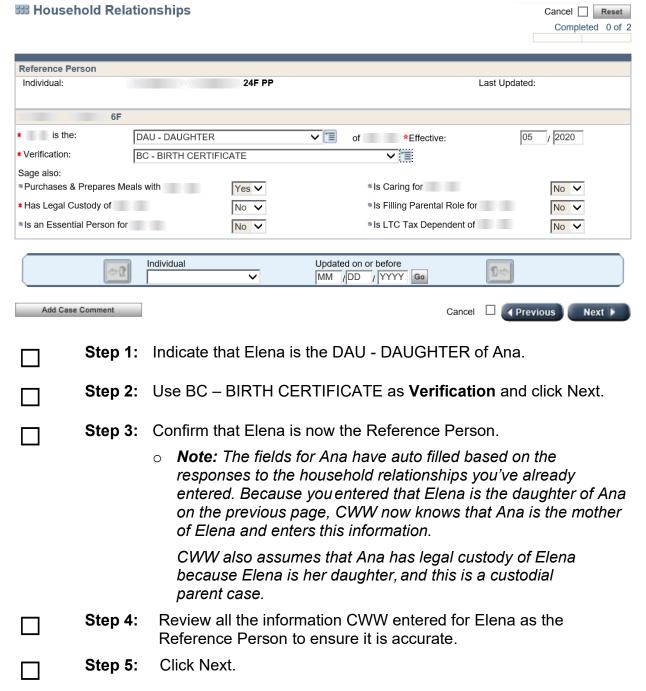


Interview Details



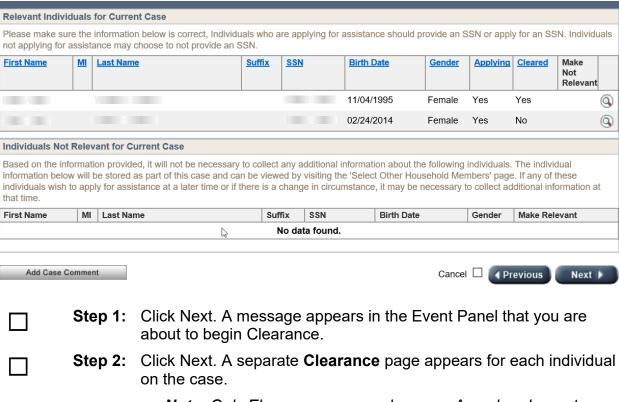
Step 1: Select F - FACE TO FACE from the **Interview Type** drop-down menu and click Next.

Household Relationships



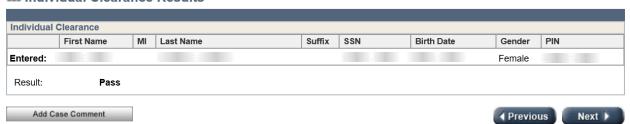
Relevance Results

B Relevance Results



Individual/Case Clearance Results

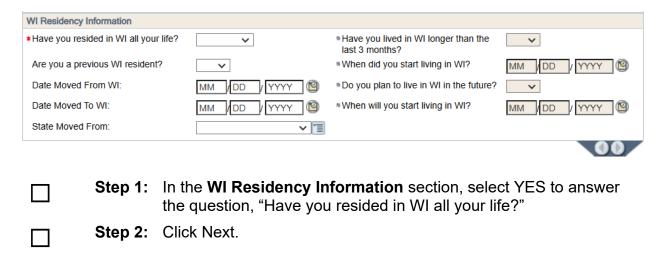
Individual Clearance Results



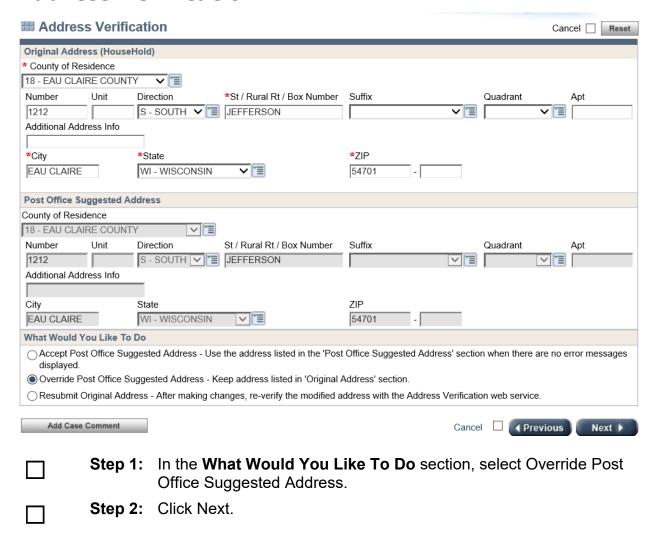
- **Step 1:** Review Elena's results to be sure they are correct and what you expected.
 - You should not have a match. If you have a match, click the Previous button and change Elena's SSN or birth date so there is no match.
 - Note: The clearance result must be Pass. If the result does not show Pass, or if you have any other problems with Clearance, contact <u>PTTTrainingSupp@wisconsin.gov</u> for assistance.
- Step 2: Click Next.

General Case Information

Ana has lived in Wisconsin her entire life. Her friends and family are here, and she never had a reason to leave.

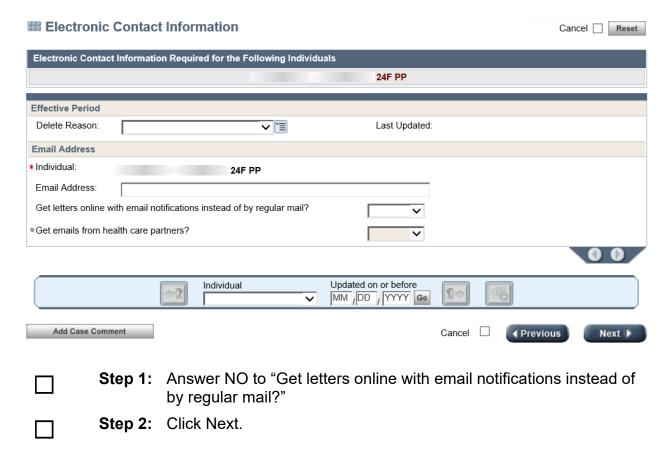


Address Verification



Electronic Contact Information

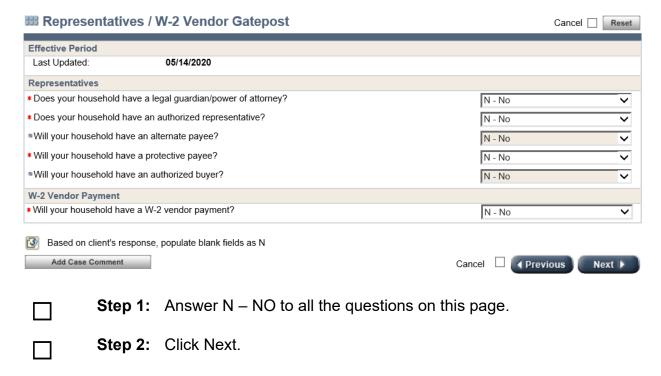
She would like to get her notices in the mail. Ana does have an email address but worries about not always having access to the Internet.



19

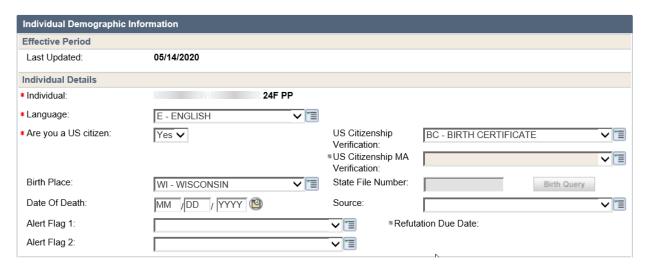
Representatives/W-2 Vendor Gatepost

Ana does not have any authorized representatives and is in charge of her own finances. She does not indicate that she wants part of her W-2 payment to go to a vendor.

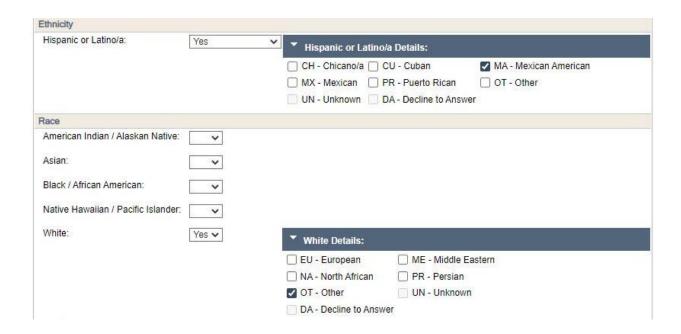


Permanent Demographics

Ana's primary language is English. She is a citizen and was born in Wisconsin. You already have her birth certificate, so you use that to verify citizenship. Ana identifies as Hispanic (Mexican American) and white (Other).



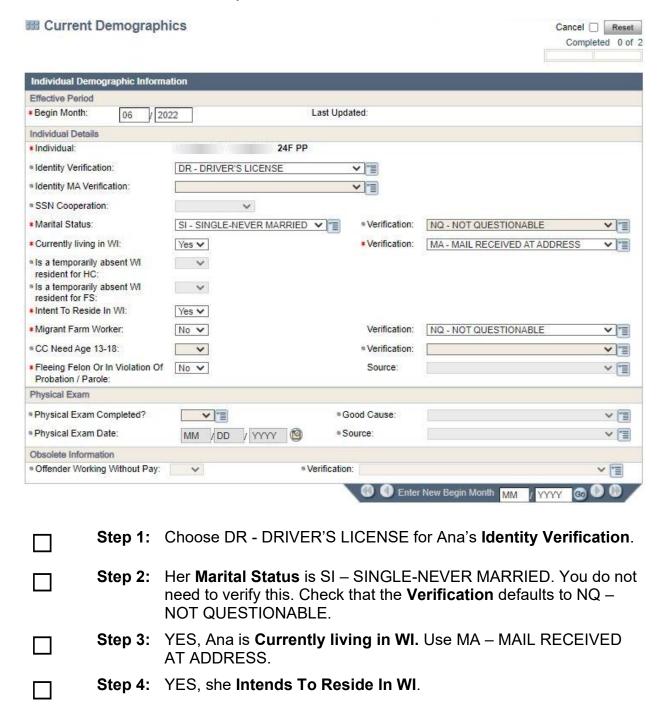
- **Step 1:** Select E ENGLISH for Ana's **Language**.
- Step 2: Select YES to indicate that Ana is a US citizen. Use BC BIRTH CERTIFICATE to verify Ana's citizenship.
- Step 3: Select WI WISCONSIN as Ana's Birth Place.



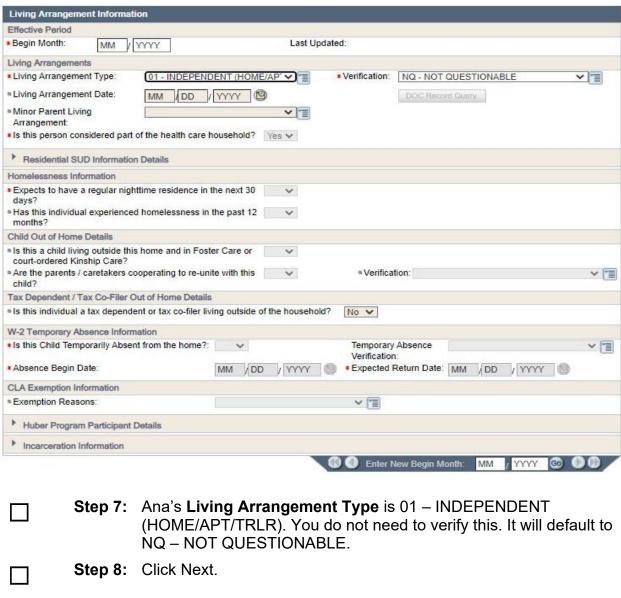
	Step 4:	Ana's Ethnicity is Hispanic – Mexican American and her Race is White - Other. Select these options for her.
	Step 5:	Click Next.
	•	Elena's birth certificate to verify citizenship and chooses not to ce or ethnicity.
	Step 6:	Select E – ENGLISH for Elena's Language .
	Step 7:	Select YES to indicate that Elena is a US citizen. Use BC – BIRTH CERTIFICATE to verify Elena's citizenship.
	Step 8:	Select WISCONSIN as Elena's Birth Place.
	Step 9:	Since Ana chooses not to disclose Elena's ethnicity or race, indicate DECLINE TO ANSWER in the Ethnicity and Race sections.
П	Step 10:	Click Next.

Current Demographics

Ana has her driver's license with her to prove her identity. She has never been married and is currently living in Wisconsin with no plans to move. Ana has never had any legal issues and lives in her own apartment, which she pays for herself. Ana provides a piece of mail for Wisconsin residency verification.



Step 5:	NO, she is not a Migrant Farm Worker . You do not need to verify this.
Step 6:	NO, she is not a Fleeing Felon Or In Violation Of Probation/Parole .



Step 8: Click Next.

Step 9: Elena's Marital Status is SI – SINGLE-NEVER MARRIED.

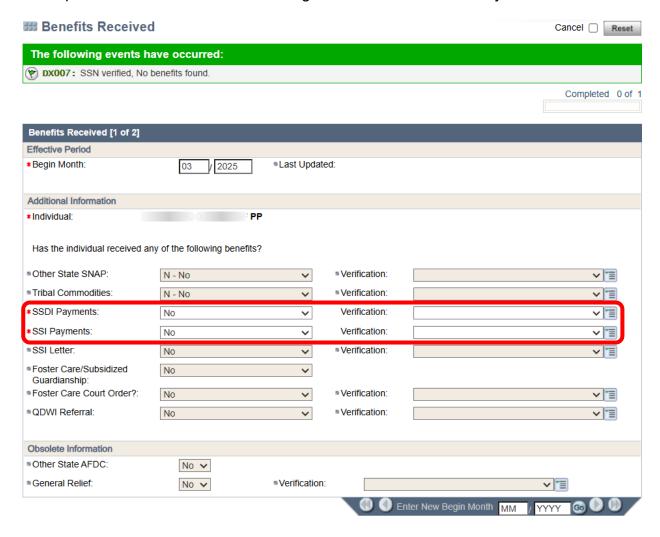
Step 10: YES, Elena is Currently living in WI. Check that the Verification defaults to NQ – NOT QUESTIONABLE.

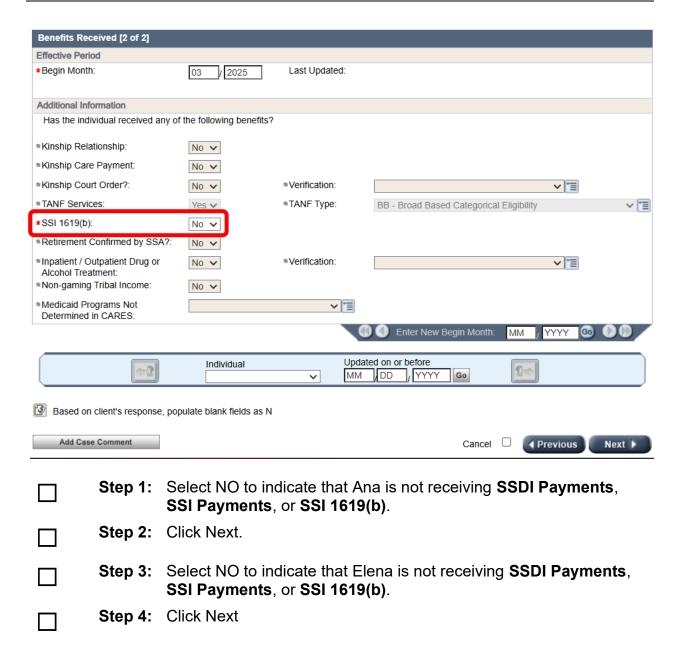
Step 11: YES, Elena Intends To Reside In WI.

Step 12:	NO, she is not a Migrant Farm Worker or a Fleeing Felon Or In Violation Of Probation/Parole .
Step 13:	Elena's Living Arrangement Type is 01 – INDEPENDENT (HOME/APT/TRLR). You do not need to verify this. It will default to NQ – NOT QUESTIONABLE.
Step 14:	Click Next.

Benefits Received

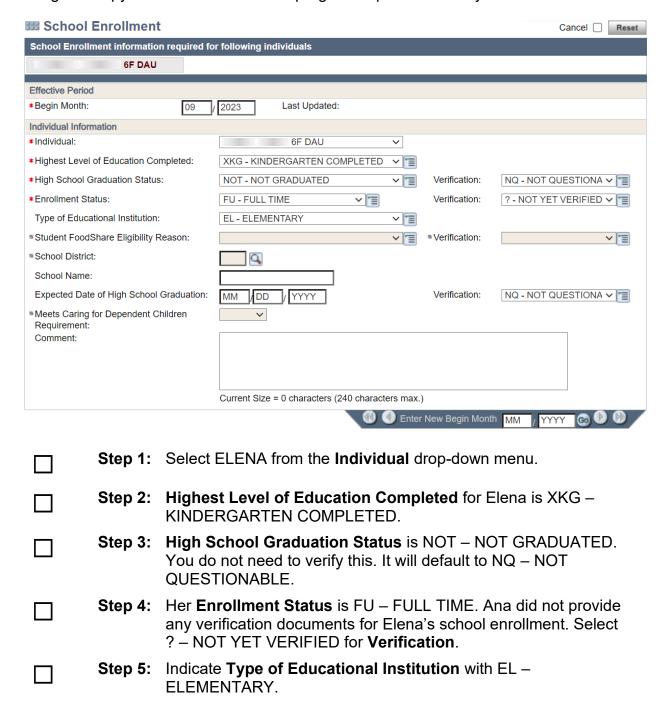
Ana reports that neither she nor her daughter receive benefits of any kind.

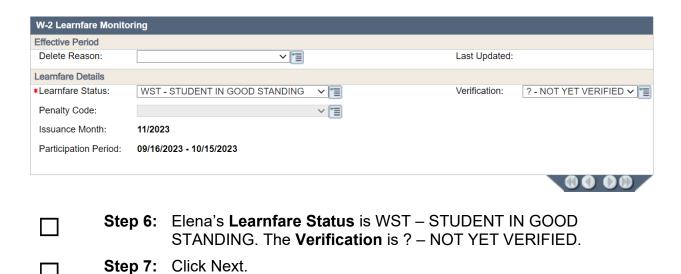




School Enrollment

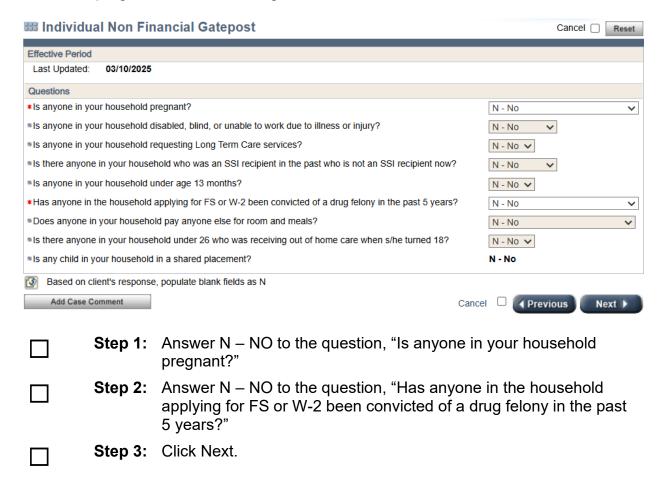
Elena completed Kindergarten last year and is enrolled in first grade this year. Ana will bring in a copy of Elena's most recent progress report later today.





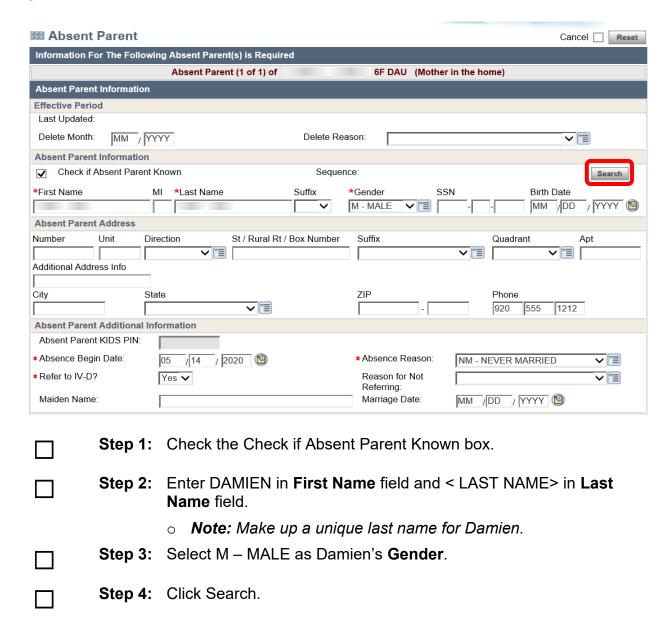
Individual Non-Financial Gatepost

Ana is not pregnant and has no drug felonies.



Absent Parent

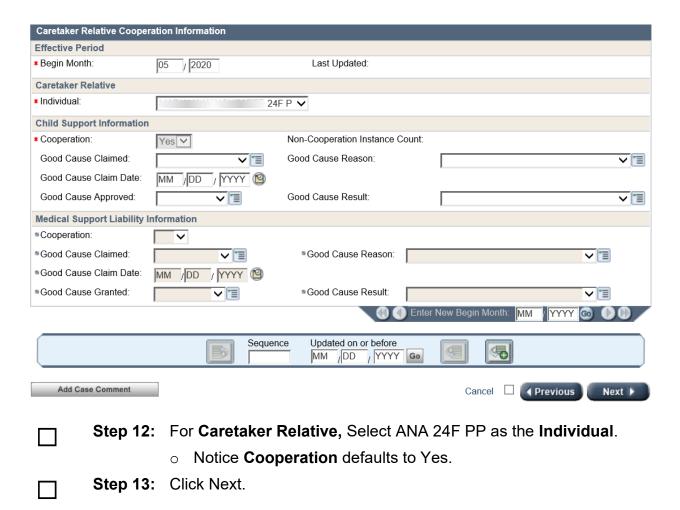
Elena's father's name is Damien. He's not involved with Elena and is not paying any child support. Elena's birth certificate lists Damien as her father. You review the Notice of Assignment and Good Cause Notice publications with Ana. Ana would like Damien to help out financially with Elena. All Ana has is a phone number for Damien. She wants to work with the Child Support Agency and does not have a reason to request Good Cause at this time.



	Step 5:	Click Next twice. CWW will search for the absent parent twice.		
		 The first click searches for any Absent Parent that is already part of the case, and 		
		 The second click searches for an Absent Parent that may be already known to CWW. 		
	Step 6:	In the Absent Parent Address section, enter 920-555-1212 in the Phone field.		
	Step 7:	Enter <today's date=""> as Absence Begin Date.</today's>		
	Step 8:	Select NM – NEVER MARRIED as the Absence Reason .		
П	Step 9:	Indicate YES for Refer to IV-D?		
		Note: IV-D is Child Support.		



- Step 10: Select ELENA 06 DAU as the Individual. Based on Elena's birth certificate, we know legal parentage is established. Select Y LEGAL PARENTAGE ESTABLISHED FOR THIS CHILD as Legal Parentage Status.
- Step 11: Click Add.



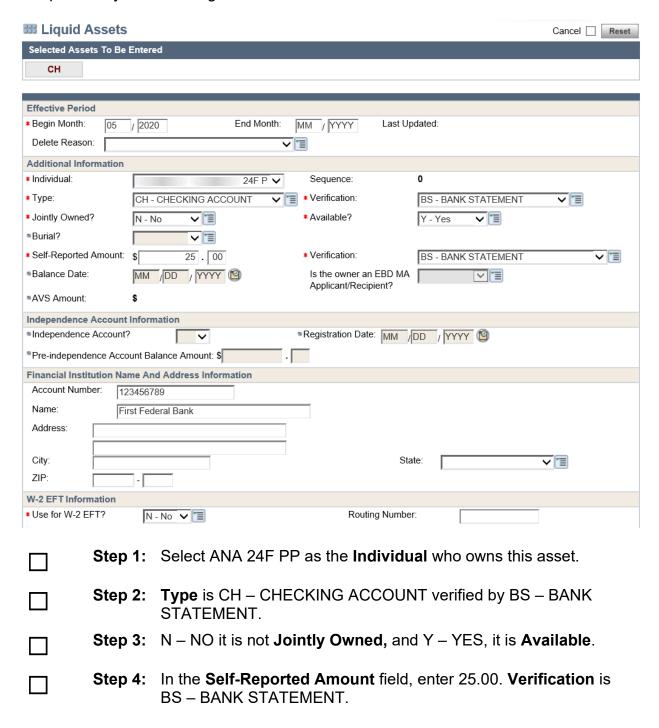
Asset Gatepost

Ana owns a vehicle and has a checking account. Elena does not have any assets.

M Asset Gatepost				Cancel Res
Effective Period				
Last Updated:	05/14/2020			
CP Asset Information				
Has the asset information from	the latest ACP application PDF beer	n processed?		~
iquid Asset				
Joes anyone in your househol	d have any of the following Liquid ass	sets?		
▼ Cash:	N - No	*Tax Shelter Account:	N - No	~
Savings Account:	N - No	★ Christmas Club:	N - No	~
Savings Certificate:	N - No	* IRA Account:	N - No	~
Checking Account:	Y - Yes	≭ Keogh Plan:	N - No	~
Prepaid Debit Card:	N - No	★ Credit Union:	N - No	~
Trust Funds:	N - No	≭ Tax Refund:	N - No	~
Stocks and Bonds:	N - No	*Escrow Account for Home Sale:	N - No	~
EBD Medicaid Annuity:	N - No	★ Money Owed:	N - No	~
US Savings Bond:	N - No	Child Support DEFRA Disregard:	N - No	~
Money Market:	N - No	Excess Over Life of Grant:	N - No	~
Monthly Excess Over Grant:	N - No	* Other:	N - No	~
Special Resource:	N - No			
ehicle Asset				
Does anyone in your househ	old own or is anyone buying a Vehicl	e (car, truck, boat, snowmobile, other)?	Y - Yes	~
Step 1:	Select Y - YES for C section.	Checking Account in the	Liquid <i>i</i>	Asset
Step 2:	Select Y - YES for th	ne question in the Vehicle	Asset	section.
Step 3:	Indicate NO for all of	ther fields.		
Step 4:	Click Next.			

Liquid Assets

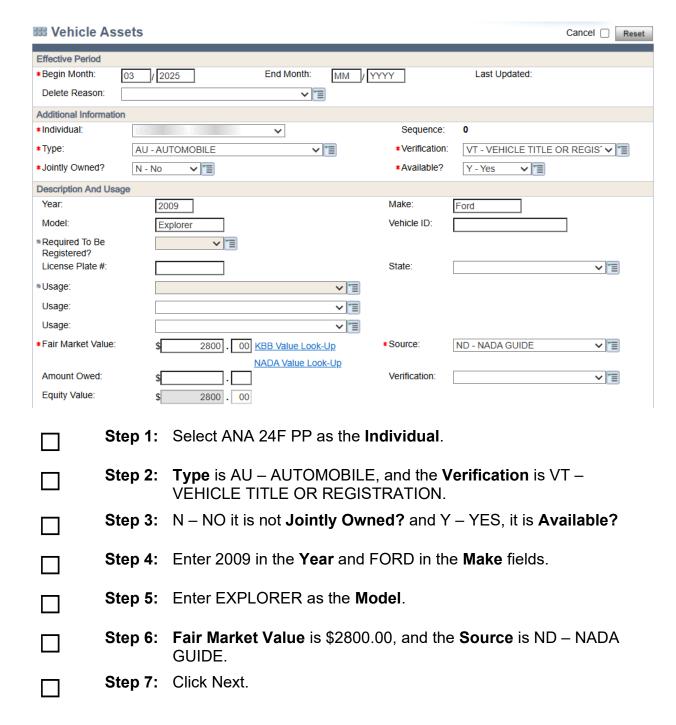
Ana brings a printout of her account information. You review Ana's bank statement with her. Her current account balance is \$25.00. She chooses not to use this account for Electronic Funds Transfer (EFT). She's looking forward to gaining employment so she can potentially add a savings account.



Step 5:	Enter 123456789 as the Account Number and FIRST FEDERAL BANK as the name of the institution.
Step 6:	N – NO this account is not "Used for W-2 EFT?"
Step 7:	Click Next. You'll see a warning message about EFT. Click Next again.

Vehicle Assets

Ana's vehicle runs, and she's confident in its reliability. Ana brought her vehicle title with her. She owns a 2009 Ford Explorer and doesn't owe anything on the vehicle. Together, you review the NADA Guide to get the trade-in value based on the condition and miles of the vehicle.



Employment/Unemployment Queries

Ana is currently unemployed. She reports that no one in the household has any source of income at this time.

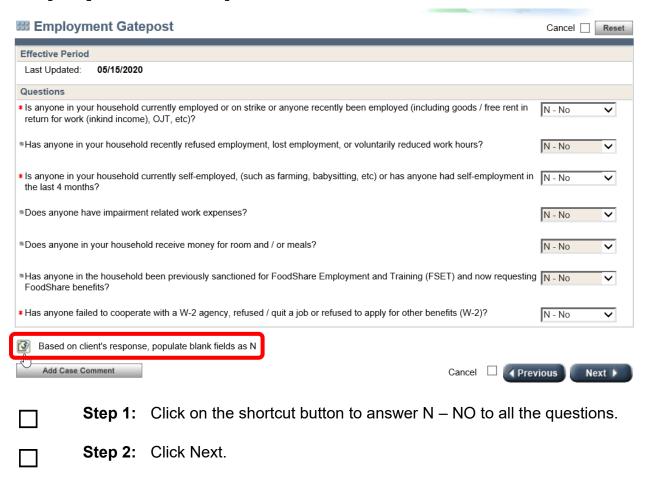
33 Employment Queries



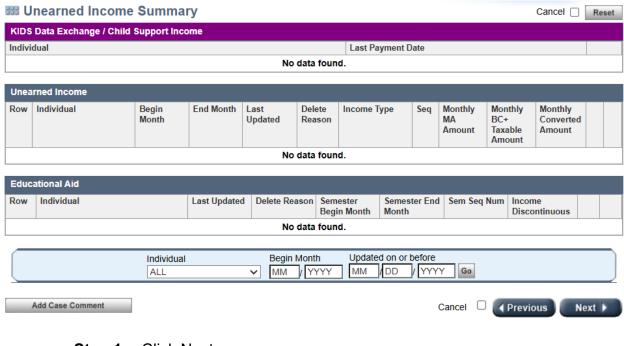


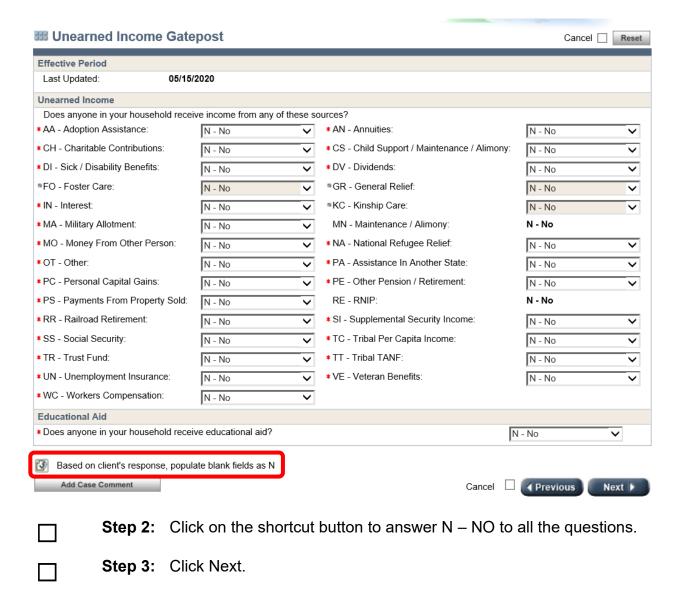
Step 1: Click Next.

Employment Gatepost



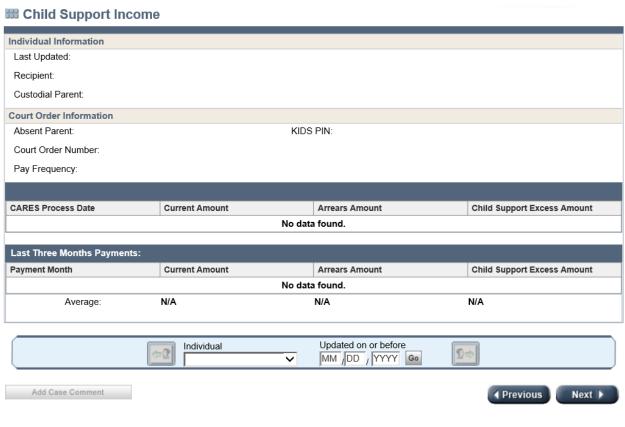
Unearned Income Gatepost





Child Support Income

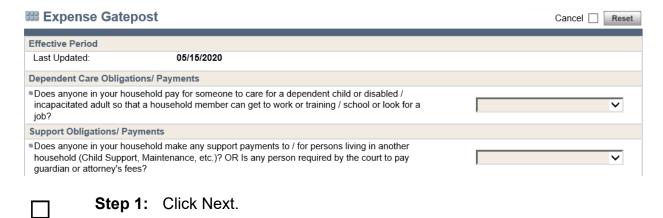
For training cases, no information displays.



Step 1: Click Next.

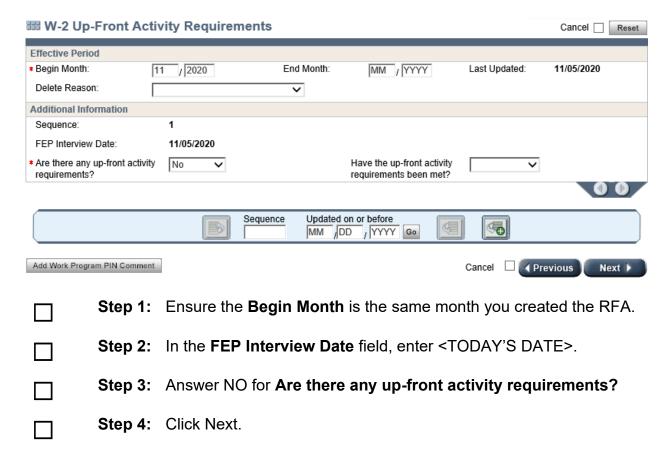
Expense Gatepost

All fields on this page are gray because expenses are not relevant for W-2 eligibility.



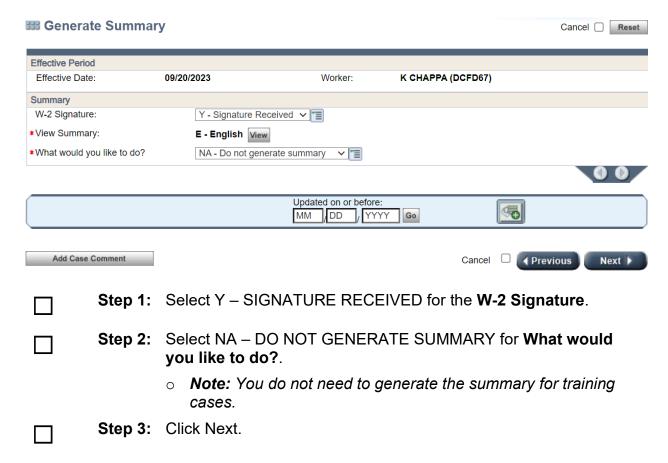
W-2 Up-Front Activity Requirements

You are not assigning Ana up-front activities as a condition of eligibility.

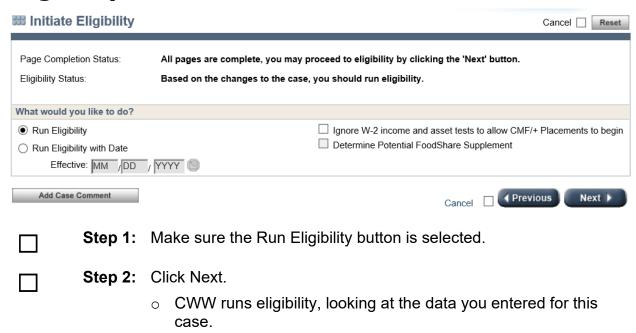


Generate Summary

Before printing the Application Summary, you go over all required forms with Ana.



Eligibility Determination



Eligibility Run Results

III Eligibility Run Results

o The following event has occurred:

(GL314: No Potential Errors detected.

Health Care / CTS Program Results												
Run	Assistance Group	Sequence	Benefit Begin Date	Benefit End Date	AG Status	Eligibility Status	Reasons					
1	CTSZ - CARETAKER SUPPLEMENT - DID NOT APPLY	1	11/01/2023		DENIED	FAIL	054	(4)				
			10/01/2023	10/31/2023	DENIED	FAIL	<u>054</u>					
			09/01/2023	09/30/2023	DENIED	FAIL	<u>054</u>					
	MA Z - MEDICAL ASSISTANCE - DID NOT APPLY	1	11/01/2023		DENIED	FAIL	054	Q				
			10/01/2023	10/31/2023	DENIED	FAIL	054					
			09/01/2023	09/30/2023	DENIED	FAIL	<u>054</u>					

Other Program Results											
Run	Assistance Group	Sequence	Benefit Begin Date	Benefit End Date	AG Status	Eligibility Status	Reasons				
1	FS Z - FOODSHARE - DID NOT APPLY	1	11/01/2023		DENIED	FAIL	<u>054</u>	Q			
			10/01/2023	10/31/2023	DENIED	FAIL	<u>054</u>				
			09/19/2023	09/30/2023	DENIED	FAIL	<u>054</u>				
	CC Z - CHILD CARE-DID NOT APPLY	1	11/01/2023		DENIED	FAIL	<u>054</u>	(3)			
			10/01/2023	10/31/2023	DENIED	FAIL	<u>054</u>				
			09/01/2023	09/30/2023	DENIED	FAIL	<u>054</u>				
	WW C - W-2 FOR OLDEST MINOR CHILD WITH CUSTODIAL PARENT		11/01/2023		PEND	PENDING		(3)			
			10/01/2023	10/31/2023	PEND	PENDING					
			09/19/2023	09/30/2023	PEND	PENDING					

Add Case Comment



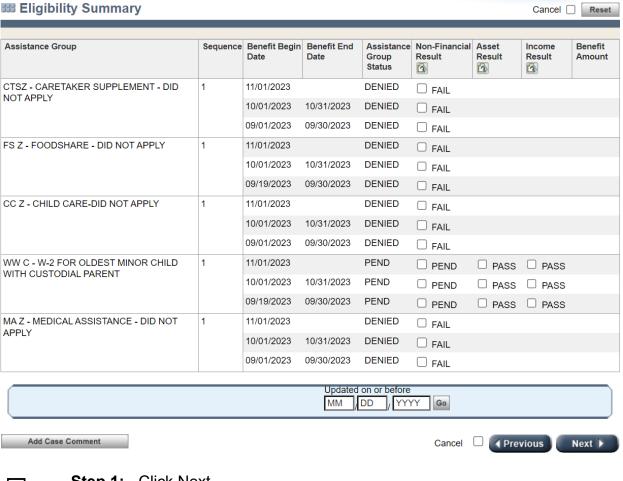
Next >

- Step 1: Ana's case should display a PEND for W-2
 - Note: If it does not say PEND, contact PTTTrainingSupp@wisconsin.gov.
- Step 2: Click the Magnifying Glass to the right of the W-2 results.
 - Note: This will take you to the Assistance Group Composition Details page.

Assistance Group Composition Details

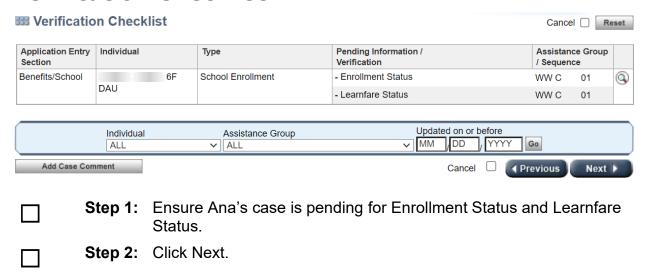


Eligibility Summary

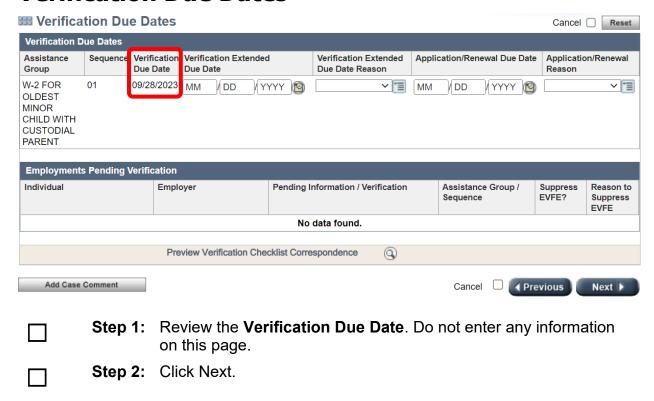


γ Step 1: Click Next.

Verification Checklist



Verification Due Dates

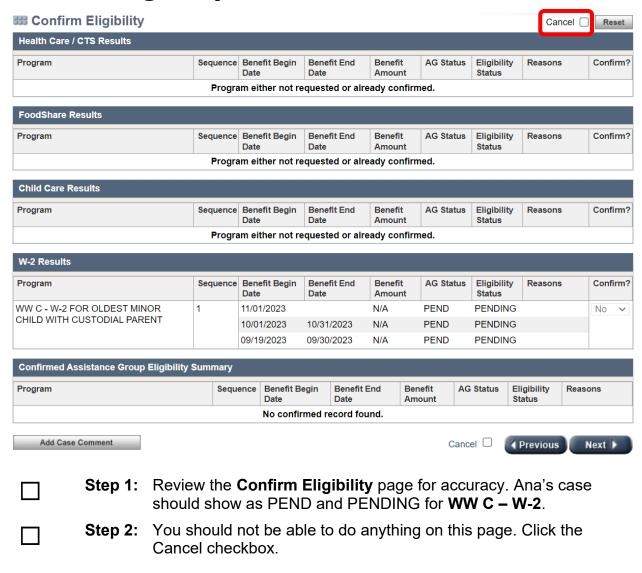


Pending/Not Verified Information

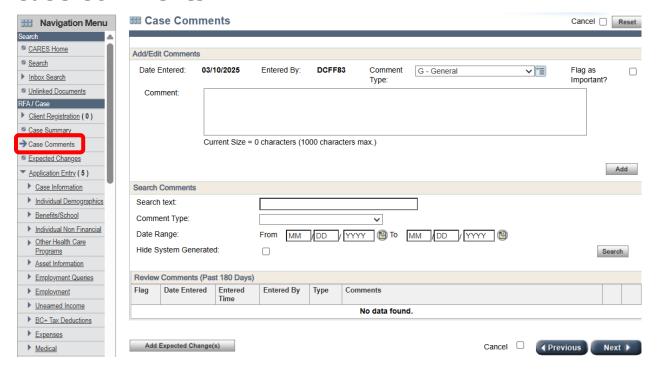


Step 1: Click Next.

Confirm Eligibility



Case Comments



- Step 1: From the Navigation Menu, navigate to the Case Comments page.
- Step 2: For Comment Type, choose I INTAKE.
- Step 3: Enter appropriate comments about the completion of this application.
 - Note: Below is an example of case comments. CWW allows up to 1000 characters. If your comments are longer, split them into two entries to include all relevant information.
 - Example: Ana attended her eligibility appointment today. She reports that her household consists of herself and her daughter, Elena. She provided SSNs for herself and Elena. She verified birth date, U.S. citizenship, and household relationships with birth certificates for herself and Elena. Ana provided her driver's license to verify her identity, and mail received at her current address to verify WI residency. Ana reports no employment, no earned income, and no unearned income for the entire household. The only assets for the household are Ana's checking account and a vehicle. She provided a bank statement to verify her checking account information and the vehicle title to verify her vehicle information. The vehicle value was verified with NADA. I reviewed with and provided to Ana the Notice of Assignment Child Support, Family Medical

Support, Maintenance, and Medical Support, Good Cause Notice, W-2 Participation Agreement, TANF Electronic Benefit Transfer Transaction Restriction flyer, Your Guide to W-2 Services, Case Benefits Programs, and Child Support, and the W-2 Rights and Responsibilities publications. No up-front activities were assigned as a condition of eligibility due to agency policy. Ana did not provide proof of Elena's school enrollment and attendance. Case is pending for School Enrollment Status and Learnfare Status.

Step 4: Click Add.







You are at the end of Ana's entries for Applying for W-2.

- Send an email to PTTTrainingSupp@wisconsin.gov.
- Subject Line: Applying for W-2 Ana and Ana's Case number.

A trainer will review your entries and provide feedback.