

# **Applying for W-2 Entry Guide – Part Two**

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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](mailto: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: [bwfworkprogramshd@wisconsin.gov](mailto:bwfworkprogramshd@wisconsin.gov)

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.

## Brittany

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You are meeting in person with Brittany for the Application appointment. Log into CWW and pull up her RFA.

- ☐ **Step 1:** Confirm your worker ID is entered.
- ☐ **Step 2:** Enter Brittany's RFA month (MM) and year (YYYY) in the **Enter Begin Month for New Data** field at the bottom of the page.
- ☐ **Step 3:** Select Begin Intake Interview.
- ☐ **Step 4:** Progress through the following pages:
  - **Review Basic Information**
  - **Individual/Case Clearance Results**
  - **Case Comments**

Brittany lives with her son, Mason, who is nine years old, and her daughter, Ella, who is three weeks old. She provides you with Social Security numbers for Mason and herself, however, Ella has not yet received a Social Security number yet. Brittany also provides birth certificates for everyone.

- ☐ **Step 5:** Enter Brittany's **Birth Date Verification**.
- ☐ **Step 6:** Click the Add New Information button to add Mason. Add the information Brittany provided verifications for.
- ☐ **Step 7:** Click the Add New Information button again to add Ella. Add the information Brittany provided verifications for.
  - **Note:** *Since Ella does not have an SSN yet, leave that field blank.*
- ☐ **Step 8:** Proceed through **Program Request** pages.
  - **Note:** *All Program Requests should be NO, except for the W-2 Request.*
- ☐ **Step 9:** On the **W-2 Request** page, enter your worker ID as the **Assigned FEP ID**. Brittany does not receive a housing subsidy. Refer her to the W-2 work program.
- ☐ **Step 10:** On the **Interview Details** page, select F – FACE TO FACE.

Brittany has legal custody of both children. Mason and Ella have different fathers, so they are half siblings.

- ☐ **Step 11:** Record the relationships of the household members. Brittany has legal custody of both children.
- ☐ **Step 12:** Click Next after your entries for each person to move forward to the next person.
- ☐ **Step 13:** After you have entered all household relationships, the driver flow proceeds to the next page.
- ☐ **Step 14:** All **Individuals** should pass **Clearance**.
  - **Note:** *If you have a match, contact [PTTTrainingSupp@wisconsin.gov](mailto:PTTTrainingSupp@wisconsin.gov) for help.*
- ☐ **Step 15:** Click Next to proceed to the results for the next individual, until all household members have gone through clearance.

Brittany has not lived in Wisconsin her whole life. About three years ago, she moved to Minnesota with Mason's father. After the relationship ended, she moved back to Wisconsin to be closer to her family. That was about a year ago.

- ☐ **Step 16:** Indicate that Brittany has not lived in Wisconsin her whole life. She moved to Minnesota three years ago and moved back to Wisconsin one year ago.
- ☐ **Step 17:** She does not have an **Alternate Mailing Address**.
- ☐ **Step 18:** Click the radio button to **Override Post Office Suggested Address – Keep address listed in Original Address section**.

Brittany would like to get her notifications by email. Her email address is [brittany@emailservice.com](mailto:brittany@emailservice.com). Brittany manages her own finances and doesn't request her W-2 payment to go to any vendor.

- ☐ **Step 19:** Answer YES to **Get letters online with email notification instead of by regular mail?**
- ☐ **Step 20:** Enter Brittany's email address.
- ☐ **Step 21:** Answer NO to the questions on the **Representatives/W-2 Vendor Gatepost** page.

Everyone in the household speaks English and was born in Wisconsin. Brittany provides a copy of the hospital paperwork showing she applied for Ella's Social Security Number. No one in the household identifies their ethnicity as Hispanic. Brittany identifies her race as White (European), Mason's as White (European) and Black (Unknown), and Ella's as White (European).

SSN Information			
SSN:	Not Provided		SSA Verification:
SSN Exemption:	<input type="text"/> <input type="button" value="v"/> <input type="button" value="i"/>		
W-2 Initial Exemption:	<input type="text"/> <input type="button" value="v"/> <input type="button" value="i"/>	W-2 Initial Exemption Date:	<input type="text"/> MM <input type="text"/> DD <input type="text"/> YYYY <input type="button" value="v"/> <input type="button" value="i"/>
SSN Application Date:	<input type="text"/> MM <input type="text"/> DD <input type="text"/> YYYY <input type="button" value="v"/> <input type="button" value="i"/>	Verification:	<input type="text"/> <input type="button" value="v"/> <input type="button" value="i"/>
SSN Override Verification:	<input type="text"/> <input type="button" value="v"/> <input type="button" value="i"/>		

- ☐ **Step 22:** Enter **Language, Citizenship, Ethnicity, and Race** for all individuals in the household. Enter Ella's birth date for her **SSN Application Date** and **Verification**.

**Note:** Click Next to proceed through all individuals in the household.

Brittany provides her driver's license to verify her identity, and her current lease to verify Wisconsin residency. All of them reside in Wisconsin, and plan to stay here. Brittany has never been married, although she does inform you that she is in a relationship with Ella's father. No one in the household is a migrant farm worker or a fleeing felon. Brittany lives in her own apartment.

- ☐ **Step 23:** Enter the **Identity Verification** field for Brittany.
- ☐ **Step 24:** Everyone is **Currently living in WI** (verify for Brittany), **Intends to Reside in WI**, and is not a **Migrant Farm Worker**.
- ☐ **Step 25:** All members of the household are SINGLE-NEVER MARRIED.
- ☐ **Step 26:** No one is **Fleeing Felon Or In Violation of Probation/Parole**.
- ☐ **Step 27:** Their **Living Arrangement** is Independent.

Mason receives SSI payments due to his diagnosis of autism. Brittany provides documentation of this.

Benefits Received [1 of 2]			
<b>Effective Period</b>			
* Begin Month:	06 / 2020	Last Updated:	
<b>Additional Information</b>			
* Individual:	9M SON		
Has the individual received any of the following benefits?			
* Other State SNAP:	<input type="text"/>	* Verification:	<input type="text"/>
* Tribal Commodities:	<input type="text"/>	* Verification:	<input type="text"/>
* SSDI Payments:	No	* Verification:	<input type="text"/>
* SSI Payments:	Yes	* Verification:	SC - SSA OR SSI RECORDS OR CHECK
* SSI Letter:	<input type="text"/>	* Verification:	<input type="text"/>
* Foster Care/Subsidized Guardianship:	<input type="text"/>	* Verification:	<input type="text"/>
* Foster Care Court Order?:	<input type="text"/>	* Verification:	<input type="text"/>
* QDWI Referral:	<input type="text"/>	* Verification:	<input type="text"/>
<b>Obsolete Information</b>			
* Other State AFDC:	<input type="text"/>	* Verification:	<input type="text"/>
* General Relief:	<input type="text"/>	* Verification:	<input type="text"/>

Enter New Begin Month MM / YYYY Go

- ☐ **Step 28:** Enter YES for Mason's receipt of **SSI Payments**.
- ☐ **Step 29:** Verify this by SC – SSA OR SSI RECORDS OR CHECKS.
- ☐ **Step 30:** Enter NO for SSI 1619(b).

Mason completed third grade last year and currently is in fourth grade. Brittany provides you with Mason's school records and attendance report.

- ☐ **Step 31:** Record information for Mason.
- ☐ **Step 32:** Verify Mason's enrollment with SR – SCHOOL RECORD.
- ☐ **Step 33:** He is a student in good standing. Verify this with AR – ATTENDANCE REPORT.

Brittany is not pregnant and has no drug felonies.

- ☐ **Step 34:** On the **Individual Non-Financial Gatepost** page, answer N - NO to each of these questions.

Mason's father is Simon. Brittany and Simon were never married, and they get along pretty well. Brittany provides Simon's phone number. You review the policy on child support cooperation and good cause and go over the required child support publications. Brittany is cooperating with child support and there is a child support order in place for Mason. She does not need to claim good cause at this time.

- ☐ **Step 35:** Enter Simon's information, including phone number.
- ☐ **Step 36:** Select YES to **Refer to IV-D?** and include the absence reason.
- ☐ **Step 37:** MASON 9M SON is the **Individual**, and legal parentage has been established.
- ☐ **Step 38:** Brittany is Mason's caretaker relative.

Brittany tells you Ella's father is Viktor. They are currently in a relationship but are not married. Viktor does not live in the home, and she does give you his phone number. You refer the case to child support, and Brittany is cooperating. Legal parentage hasn't been established yet, and she would like to get it established.

- ☐ **Step 39:** Enter Viktor's information.
- ☐ **Step 40:** Refer to child support and indicate that legal parentage has not yet been established.
- ☐ **Step 41:** Brittany is Ella's caretaker relative.

Brittany has a pre-paid debit card and savings account. She provides a printout of her bank account information. Brittany's current pre-paid debit card balance is \$12.00, and her savings account balance is \$120.00. She chooses not to use either account for Electronic Funds Transfer (EFT). Neither child has any assets.

- ☐ **Step 42:** On the **Asset Gatepost** page, indicate YES for **Prepaid Debit Card** and **Savings Account**.
- ☐ **Step 43:** Enter Brittany's Savings Account information, including account balance (\$120), account number, and bank name.
- ☐ **Step 44:** This is not being used for EFT.
- ☐ **Step 45:** Enter Brittany's Prepaid Debit Card, including account balance (\$12), account number, and bank name.
- ☐ **Step 46:** This is not being used for EFT.

Brittany is unemployed.

☐ **Step 47:** On the **Employment Gatepost** page, answer No to all questions.

Mason receives Child Support, Supplemental Security Income (SSI), and State Supplementary Income (State SSI).

**Unearned Income Gatepost** Cancel ☐ Reset

**Effective Period**

Last Updated: **03/12/2025**

**Unearned Income**

Does anyone in your household receive income from any of these sources?

*AA - Adoption Assistance:	N - No	*AN - Annuities:	N - No
*CH - Charitable Contributions:	N - No	*CS - Child Support / Maintenance / Alimony:	Y - Yes
*DI - Sick / Disability Benefits:	N - No	*DV - Dividends:	N - No
*FO - Foster Care:	N - No	*GR - General Relief:	N - No
*IN - Interest:	N - No	*KC - Kinship Care:	N - No
*MA - Military Allotment:	N - No	MN - Maintenance / Alimony:	N - No
*MO - Money From Other Person:	N - No	*NA - National Refugee Relief:	N - No
*OT - Other:	N - No	*PA - Assistance In Another State:	N - No
*PC - Personal Capital Gains:	N - No	*PE - Other Pension / Retirement:	N - No
*PS - Payments From Property Sold:	N - No	RE - RNIP:	N - No
*RR - Railroad Retirement:	N - No	*SI - Supplemental Security Income:	N - No
*SS - Social Security:	N - No	*TC - Tribal Per Capita Income:	
*TR - Trust Fund:	N - No	*TT - Tribal TANF:	
*UN - Unemployment Insurance:	N - No	*VE - Veteran Benefits:	
*WC - Workers Compensation:	N - No		

**Educational Aid**

\*Does anyone in your household receive educational aid? N -

Based on client's response, populate blank fields as N

Add Case Comment Cancel ☐ Previous Next

? - Doesn't know or questionable  
F - Failed to provide information  
N - No  
O - Fail W-2 and/or CC  
Y - Yes

☐ **Step 48:** Enter Y – YES for **SI – Supplemental Security Income** and for **CS – Child Support / Maintenance / Alimony**.



## Unearned Income

Cancel ☐ Reset

## Selected Incomes To Be Entered

CS

SI

## Effective Period

\* Begin Month: 06 / 2020 End Month: MM / YYYY Last Updated:

Delete Reason: 

## Income Information

\* Individual: 9M SON SSN: Sequence: 0

\* Income Type: CSCC - CHILD SUPP-CURRENT,NOT RTND

\* Verification: DE - DATA EXCHANGE

Claim SSN Number: N/A

\* Income Begin Date: 06 / 09 / 2019 Income End Date: MM / DD / YYYY

\* Income Discontinued? No Date Loss Of Income Reported: MM / DD / YYYY

\* Frequency Period: M - MONTHLY Number of Pays: 0

\* Income Available? Yes Monthly Converted Amount: \$  . Monthly MA Amount: \$  . \* Monthly BC+ Taxable Amount: \$  . 

☐ **Step 49:** Select MASON as the individual and CSCC as the **Income Type**. Choose DE – DATA EXCHANGE for the **Verification**.

☐ **Step 50:** Use a date a year ago for the **Income Begin Date**. This income is not discontinued; it is monthly, and it is available.

☐ **Step 51:** Skip the **Disregards and Expenses** section.

## Details

Delete	Gross Income Amount	Verification	BC+ Taxable Amount	Verification	Delete
<input type="checkbox"/>	\$ <input type="text"/> . <input type="text"/>		\$ <input type="text"/> . <input type="text"/>		<input type="checkbox"/>
	* BC+ Taxable Amount	* Verification			
	\$ <input type="text"/> . <input type="text"/>				

Gross Income Amount	Verification	BC+ Taxable Amount	Verification	Delete
200.00	DE - DATA EXCHANGE			

☐ **Step 52:** In the **Details** section, enter the **Gross Income Amount** of \$200 with a **Verification** of DE – DATA EXCHANGE.

☐ **Step 53:** Click Add to add this information to the dynalist.

☐ **Step 54:** Click Calculate.

☐ **Step 55:** Click Next.

**Unearned Income** Cancel ☐ Reset

**Selected Incomes To Be Entered**

**SI**

**Effective Period**

\* Begin Month: 06 / 2020 End Month: MM / YYYY Last Updated:

Delete Reason:

**Income Information**

\* Individual: 9M SON SSN: Sequence: 0

\* Income Type: SI - SUPPLEMENTAL SECURITY INCOME

\* Verification: SA - SSA DOCUMENT

Claim SSN Number: N/A

\* Income Begin Date: 06 / 01 / 2016 Income End Date: MM / DD / YYYY

\* Income Discontinued? No Date Loss Of Income Reported: MM / DD / YYYY

\* Frequency Period: M - MONTHLY Number of Pays: 0

\* Income Available? Yes Monthly Converted Amount: \$ .

Monthly MA Amount: \$ .

\* Monthly BC+ Taxable Amount: \$ .

- ☐ **Step 56:** Select MASON as the individual and select SI – SUPPLEMENTAL SECURITY INCOME as the **Income Type**. Enter SA - SSA DOCUMENT as the **Verification**.
- ☐ **Step 57:** Enter a date four years ago as the **Income Begin Date**. This income is not discontinued; it is monthly, and it is available.
- ☐ **Step 58:** Skip the **Disregards and Expenses** section.
- ☐ **Step 59:** Enter Mason’s Federal SSI income with a **Gross Income Amount** of \$967 in the **Details** section using SA—SSA DOCUMENT for the **Verification**.
- ☐ **Step 60:** Click Add to add this income to the dynalist.
- ☐ **Step 61:** Click Calculate.
- ☐ **Step 62:** Click the Add New Information button to add the state amount of SSI income.
- ☐ **Step 63:** Select MASON as the individual and select SISS – STATE SUPPL SECURITY INCOME as the **Income Type**.
- ☐ **Step 64:** Enter SC—SSA OR SSI RECORDS OR CHECKS as the **Verification**.

- ☐ **Step 65:** Use the same date as the SI begin date as the **Income Begin Date**. This income is not discontinued, and it is available.
- ☐ **Step 66:** Skip the **Disregards and Expenses** section.
- ☐ **Step 67:** Enter Mason's State SSI **Gross Income Amount** of \$83.78 in the **Details** section using SC—SSA OR SSI RECORDS OR CHECKS for the **Verification**.
- ☐ **Step 68:** Click Add to add this income to the dynalist.
- ☐ **Step 69:** Click Calculate.
- ☐ **Step 70:** Today was Brittany's FEP interview, and she was not assigned up-front activities.
- ☐ **Step 71:** Select Y – SIGNATURE RECEIVED for the **W-2 Signature** field.
- ☐ **Step 72:** Select NA – DO NOT GENERATE SUMMARY.

You now have collected all the necessary information to determine eligibility.

- ☐ **Step 73:** Run Eligibility.
- ☐ **Step 74:** Brittany's case should display Pass for W-2.
  - **Note:** If the case does not pass, contact [PTTTrainingSupp@wisconsin.gov](mailto:PTTTrainingSupp@wisconsin.gov).

**Confirm Eligibility**Cancel ☐ **Health Care / CTS Results**

Program	Sequence	Benefit Begin Date	Benefit End Date	Benefit Amount	AG Status	Eligibility Status	Reasons	Confirm?
Program either not requested or already confirmed.								

**FoodShare Results**

Program	Sequence	Benefit Begin Date	Benefit End Date	Benefit Amount	AG Status	Eligibility Status	Reasons	Confirm?
Program either not requested or already confirmed.								

**Child Care Results**

Program	Sequence	Benefit Begin Date	Benefit End Date	Benefit Amount	AG Status	Eligibility Status	Reasons	Confirm?
Program either not requested or already confirmed.								

**W-2 Results**

Program	Sequence	Benefit Begin Date	Benefit End Date	Benefit Amount	AG Status	Eligibility Status	Reasons	Confirm?
WW C - W-2 FOR OLDEST MINOR CHILD WITH CUSTODIAL PARENT	1	06/01/2020		N/A	OPEN	PASS		<input checked="" type="button" value="Yes"/>
		05/14/2020	05/31/2020	N/A	OPEN	PASS		

**Confirmed Assistance Group Eligibility Summary**

Program	Sequence	Benefit Begin Date	Benefit End Date	Benefit Amount	AG Status	Eligibility Status	Reasons
No confirmed record found.							

Cancel ☐

- ☐ **Step 75:** Review the **Confirm Eligibility** page for accuracy. Brittany's case should show as OPEN and PASS for **WW C – W-2**.
- Note: If the case is not passing, do not confirm the case. Instead, contact [PTTTrainingSupp@wisconsin.gov](mailto:PTTTrainingSupp@wisconsin.gov).*
- ☐ **Step 76:** Confirm **W-2 Results** only if the case is passing.

**Work Programs Referral/Action**Cancel ☐ **Work Programs Referral Information**

Name	Confirmed Eligibility Result	Enrollment Status	Send Referral	Action Needed
24F PP ( )	WWC - OPEN - ELIGIBLE ADULT	OPEN IN WORK PROGRAM OFFICE 1111	SENT FOR OFFICE 1111	ENROLL VIA WWP

Cancel ☐

- ☐ **Step 77:** Review the referral status. Brittany should be displayed as **WWC – Open Eligible Adult**.
- ☐ **Step 78:** Navigate to the **Case Comments** page.



**Step 79:** Enter comments regarding the completion of this application.

- **Note:** Look back at Ana's comments for a reminder of what to include.

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



- Send an email to [PTTTrainingSupp@wisconsin.gov](mailto:PTTTrainingSupp@wisconsin.gov).
- Subject Line **Applying for W-2 – Brittany** and Brittany's Case number.

A trainer will review your entries and provide feedback. **Do not** start making entries for Chantelle until a trainer has confirmed Brittany's entries are complete.

# Chantelle

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**Here are some key reminders for Chantelle entries:**

- If we do not provide specific information to a question, you can consider the answer to be no. If you need more details for certain questions, you can make it up based on her scenario.
- Complete the Application Driver Flow for Chantelle.
  - Remember, you can refer back to Ana and Brittany, if needed.
- She provides all verifications.
- Confirm eligibility is passing.
- Enter Case Comments to document the information Chantelle provided and how you verified the information, as well as any forms you reviewed.

You are meeting in person with Chantelle for the application appointment. Chantelle lives with her 14-year-old son, Anthony. She identifies that both she and her son are Black, and they are not Hispanic.

Chantelle pulls out an envelope with several items to verify her eligibility for W-2. In the envelope are Wisconsin Birth Certificates for her and Anthony, her driver's license, a piece of paper with both of their SSNs on it, and a bank statement that she received in the mail yesterday. The bank statement has her current address and shows a balance of \$640 in her checking account. There is a copy of her current Child Support order indicating that Anthony receives \$300 each month from his father, Tyson. You verified this through Data Exchange as well.

Chantelle and Tyson were never married and split up over 10 years ago. She has had limited with Tyson, other than receiving Child Support. Anthony's birth certificate lists Tyson as his father.

Chantelle and Anthony have always lived in Wisconsin, and since their friends and family are here, they have no reason to move to any other state. She doesn't own a car, so she uses the city buses or asks her friends for rides to get around. Chantelle and Anthony have no other assets or income.

Anthony is in the ninth grade this year and just started at the high school. Chantelle has his attendance records showing that he is enrolled and in good standing.

Chantelle didn't have any questions about the required forms and publications you reviewed.

You are at the end of Chantelle entries for Applying for W-2.



- Send an email to [PTTTrainingSupp@wisconsin.gov](mailto:PTTTrainingSupp@wisconsin.gov).
- Subject Line ***Applying for W-2 – Chantelle*** and Chantelle's Case number.

A trainer will review your entries and provide feedback. **Do not** start making the next entries for Ana until a trainer has confirmed Chantelle's entries are complete.

## Ana – Verifications Provided

Ana emails you a copy of Elena's most recent school progress report and a printout of her attendance. They show Elena is enrolled full-time and is in good standing.

- ☐ **Step 1:** Access Ana's case.
- ☐ **Step 2:** Using the **Navigation** menu, click **Benefits/School, School Enrollment**.
- ☐ **Step 3:** Update Elena's **Enrollment Status Verification** to SR – SCHOOL RECORD.
- ☐ **Step 4:** Update her **Learnfare Status Verification** to AR – ATTENDANCE REPORT.
- ☐ **Step 5:** Run Eligibility.
- ☐ **Step 6:** Review the **Confirm Eligibility** page for accuracy. Ana's case should show as OPEN and PASS for **WW C – W-2**.
  - **Note:** If the case is not passing, do not confirm the case. Instead, contact [PTTTrainingSupp@wisconsin.gov](mailto:PTTTrainingSupp@wisconsin.gov).
- ☐ **Step 7:** Confirm **W-2 Results** if the case is passing.
- ☐ **Step 8:** Navigate to the **Case Comments** page. Enter comments regarding the verifications Ana provided and that the case is now open and passing.

You are at the end of Ana's entries for Verifications Provided.



- Send an email to [PTTTrainingSupp@wisconsin.gov](mailto:PTTTrainingSupp@wisconsin.gov).
- Subject Line **Verifications Provided – Ana** and Ana's Case number.

A trainer will review your entries and provide feedback.