

Reviews Entry Guide

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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: 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.

Ana

It's time for Ana's six-month eligibility review. You meet with Ana in-person, and she is still working part-time at the elementary school. The job is going well, and Ana states she is happy with her job. She provides her most recent paystubs, which show her income and hours have not changed. Ana recently opened a savings account in addition to her checking account and provides her bank statement. Her current checking account balance is \$350, and her current savings account balance is \$75. Her vehicle has not changed, and you verified the current vehicle value with the NADA website. Elena is still going to school, and Ana provides her attendance records. You review Ana's time limits with her and provided the required TANF Electronic Benefit Transfer Transaction Restriction flyer and Good Cause Notice documents.

Eligibility Review

What would you like to do?

Workflow Options	Case Maintenance
<input type="radio"/> Continue with Driver / Navigate Through Completed Pages	<input type="radio"/> Reactivate Case
<input type="radio"/> Add Person	<input type="radio"/> Transition Mainframe Case to Web Case
<input checked="" type="radio"/> Process Renewal / Review	<input type="radio"/> Initiate, Resume, or Terminate Simulation
<input type="radio"/> Record New Group Level Program Request	<input type="radio"/> Change Primary Person
<input type="radio"/> Process Group Level Program Request	<input type="radio"/> Make Case Confidential
<input type="radio"/> View / Record Six Month Report Actions	<input type="radio"/> Transfer Case
<input type="radio"/> Process linked ACCESS application	<input type="radio"/> Begin Intake Interview for Asset Assessment Case

Enter Begin Month for New Data: MM / YYYY

Add Case Comment

Next

- ☐ **Step 1:** Access the **Case Summary** page for Ana.
- ☐ **Step 2:** Select the radio button for Process Renewal/Review.
- ☐ **Step 3:** Enter **Begin Month for New Data** to reflect the month and year in which the review occurs.
- ☐ **Step 4:** Click Next.
 - **Note:** CWW navigates through the pages necessary to complete the review.
- ☐ **Step 5:** Enter verification of required information. Update the **Begin Month** on any pages you make updates.
- ☐ **Step 6:** On the **School Enrollment** page, enter Elena's **Learnfare Status Verification**.
- ☐ **Step 7:** Update the **Self-Reported Amount** of Ana's checking account and add her new savings account.

- ☐ **Step 8:** On the **Employment** page, update Ana's **Average Hours Per Pay Period Verification**.

W-2 Time Limit Information

Individual Time Limit Summary				
Eligibility Status: EA - ELIGIBLE ADULT				
Time Limit Type	Maximum	Used	Remaining	Months from 10/2009 - 12/2011 Not Counted Toward 24-Month Time Limit
State Lifetime Limit	48	1	47	-
CSJ - Community Service Jobs	24	1	23	0
W2T - W-2 Transition	24	0	24	0
CMC - Caretaker of Newborn	-	0	-	-
TEMP - Trial Employment Match Program	24	0	24	-
* TMP - TEMP Custodial Parent	-	0	-	-
* TNP - TEMP Non-Custodial Parent	-	0	-	-
TJB - Trial Jobs	-	0	-	0
OPC - Other Parent Month	-	0	-	-
OTF - Other TANF	-	0	-	-
JOBS - Active Jobs Participation	-	0	-	-
Federal 60 Month	-	1	-	-
Tribal TANF	-	0	-	-
Not Counted Toward 24 Month	-	0	-	-

- ☐ **Step 9:** Stop at the W-2 Time Limit Information page to review time used/remaining on Ana's state, placement, and federal time limits.
- ☐ **Step 10:** Run eligibility and confirm the passing eligibility determination. Click Next through all the driver flow pages until you return to the **Case Summary** page.
- ☐ **Step 11:** Enter comments on the **Case Comments** page to summarize the changes and note the review.
- Select the RENEWAL//REVIEW/SMRF comment type.
 - **Example:** *I completed a six-month review today with Ana. Her household still consists of her and her daughter, Elena. Ana continues to work at Clay Lamberton Elementary School part-time, and her hours and wages are the same. I verified this with paystubs. She reports no other earned or unearned income. Ana opened a savings account and still has her checking account. I verified both accounts with a bank statement. Ana still owns a vehicle. The title/registration to verify ownership is already in ECF. I verified the current vehicle value with NADA. She reports no other assets. Elena is still doing well in school. I verified this with school attendance records. I reviewed Ana's W-2 time limits with her and discussed/provided her the following forms: TANF Electronic Benefit Transfer Transaction Restriction flyer and Good Cause Notice. The W-2 case remains open and passing.*

Participation

Ana provides you with activity logs, showing she has completed all her activities. You ask how her activities and goals are going. Ana continues working toward her employment goals. She is making progress toward reaching her HSED and plans to take her final tests within the next few weeks. She's still reading to Elena three nights a week. She meets regularly with the Job Developer to talk about job leads and to get ready for interviews. She is now working on the Excel courses online. You both decide to leave her EP as is for now.

- ☐ **Step 1:** Navigate to Ana's **W-2 Participation Calendar**.
- ☐ **Step 2:** Track her participation for all of the activities that occurred this week.
- ☐ **Step 3:** Enter **PIN Comments** to summarize the completion of the eligibility review and discussion about her EP.
 - Select the **APPOINTMENT – OTHER, PARTICIPATION TRACKING Comment Type**.
 - Example: *Ana and I completed her six month review today. Ana is still employed part-time at Clay Lamberton Elementary School. The job is going well, and she is happy with her work. She continues to work with the Job Developer to prep for interviews. Ana is making progress toward her HSED and hopes to take her remaining tests soon. She finished her Microsoft Word courses and moved on to the Excel courses. She says they are helpful. We decided to leave her EP as is for now. Ana has provided job logs showing she completed assigned activities.*

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



- Send an email to PTTTrainingSupp@wisconsin.gov.
- Subject Line: **Ana Review** and Ana's PIN.

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

Brittany and Viktor

Brittany and Viktor attend their virtual review appointment. They report Mason's child support amount has increased to \$225 a month, and you verify this information with Data Exchange. You re-verify Mason's SSI and Supplement benefits with Social Security records. The amounts haven't changed. Brittany now has \$130 on her prepaid debit card, and she provides a bank statement for verification. There is no change to her savings account. You verify the value of Viktor's auto by checking NADA and nothing has changed. He provides you with an updated loan statement showing he now owes \$500 less. Mason is still attending school, and Brittany provides you with attendance records. Viktor is the only one working, and states things are going fine at work. He reports his hours and pay are the same, and provides his most recent paystubs. You review time limit information and provide the required flyers.

Eligibility Review

- ☐ **Step 1:** Access the **Case Summary** page for Brittany.
- ☐ **Step 2:** Select the radio button for Process Renewal/Review.
- ☐ **Step 3:** Enter **Begin Month for New Data** to reflect the month and year of the Review.
- ☐ **Step 4:** Click Next.
- ☐ **Step 5:** Enter verification of required information.
- ☐ **Step 6:** On the **Vehicle Assets** page, update the amount Viktor owes on his loan.
- ☐ **Step 7:** Update Viktor's **Average Hours Per Pay Period Verification**.
- ☐ **Step 8:** On the **Unearned Income** page, update Mason's child support amount.
- ☐ **Step 9:** In the **Details** section, click the Edit button.

Details

Delete

☐

Gross Income Amount

\$ 200 . 00

BC+ Taxable Amount

\$ 0 . 00

Verification

DE - DATA EXCHANGE

Verification

Reset

Update

Gross Income Amount	Verification	BC+ Taxable Amount	Verification	Delete
200.00	DE - DATA EXCHANGE	0.00		

Calculate

- ☐ **Step 10:** Update the **Gross Income Amount** and click Update. Then, click Calculate.
- ☐ **Step 11:** Run eligibility and confirm the passing eligibility determination.
- ☐ **Step 12:** Enter comments on the **Case Comments** page to summarize the changes and note the review.
 - Select the RENEWAL/REVIEW/SMRF, Comment Type.

Brittany's Progress

Brittany sends you activity logs, showing she has completed all her activities. She shares that she would like to start working on a healthier life style. She heard about a Beginner's Yoga Series at the YMCA. You discuss adding this as a new Personal Goal for her with signing up for and completing the Beginner's Yoga Series as a goal step.

- ☐ **Step 1:** Navigate to Brittany's W-2 Participation Calendar and enter participation for her activities.
- ☐ **Step 2:** Create a new EP and add her new goal based on information in the scenario.
- ☐ **Step 3:** Enter PIN comments about her participation, new EP, and the review.

Viktor's Participation

Viktor also sends you activity logs, showing he has completed all his activities. He still wants to get a certification in auto mechanics. He feels that will help him expand his opportunities for growth.

- ☐ **Step 1:** Navigate to Viktor's W-2 Participation Calendar.
- ☐ **Step 2:** Enter participation for Viktor's activities.
- ☐ **Step 3:** Enter PIN comments about his participation and the review.

You are at the end of Brittany's and Viktor's entries for Review.



- Send an email to PTTTrainingSupp@wisconsin.gov.
- Subject Line: **Brittany/Viktor Review** and their PINs.

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

Chantelle

Key reminders for Chantelle entries:

- Complete the Eligibility Review Driver Flow for Chantelle.
 - Remember, you can refer back to Ana and Brittany, if needed.
 - Be sure to cover her time limits and required flyers.
- She provides all verifications.
- Enter Case and PIN comments.

It's time for Chantelle's six-month eligibility review. You meet Chantelle in person today and she states things are going well with her job at Blue River Marketing. Chantelle tells you that she continues to receive positive feedback from her supervisor. She has made new friends with her co-workers, and her boss is giving her more responsibilities. She provides you her current paycheck stubs and nothing has changed. She sees herself staying at this job for a while, or at least until Anthony graduates high school. Chantelle provides you with Anthony's attendance record, which shows he's in good standing with no absences or tardies through the end of last week, and states how proud she is of him. She shows you her most recent bank statement which shows her checking account balance is \$825. She now has a savings account with a balance of \$422 that she opened after receiving her first paycheck. There are no changes to Anthony's child support.

She continues attending her retention appointments with you and doesn't want to make any changes to her EP at this time. She has not missed one of these appointments since she started working, and you update her participation information on the calendar.

You are at the end of Chantelle's entries for Review.



- Send an email to PTTTrainingSupp@wisconsin.gov.
- Subject Line: **Chantelle Review** and her PIN.

A trainer will review your entries and provide feedback.