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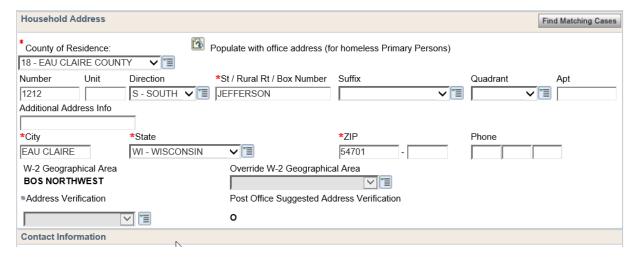W-2 Policy questions should be directed to your Regional Office staff.

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
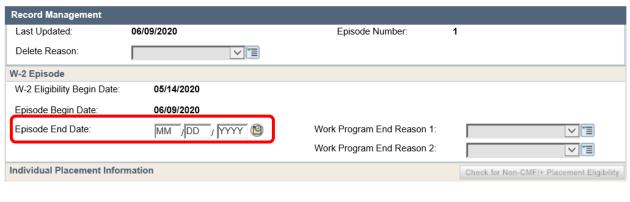the Wisconsin Relay Service (WRS) – 711.

Ana

Ana has been working for a while now and participating in her job retention appointments. You call her to check-in. She informs you that she is moving this week to live with her grandma in Rockford, IL. She quit her job to make this move, which you verify with an agency form.

Close the Case

☐ **Step 1:** Access Ana's case in CWW. Enter her new address on the **General Case Information** page.

       o *Her new address is 1741 Poplar Street, Rockford, IL, 61103*

☐ **Step 2:** Enter NO for **Currently Living in WI** and **Intend to Reside in WI** on the **Current Demographics** page.

☐ **Step 3:** Indicate that she is no longer working at the chiropractor office and use today as the end date on the **Employment** page.

       o *Remember to create and/or update future month(s) so CWW counts the correct income in its final eligibility determination.*

☐ **Step 4:** Run eligibility and confirm with Closure Reasons 238 and 239.

Record Management			
Last Updated:	06/09/2020	Episode Number:	1
Delete Reason:	[⌄] ▤		

W-2 Episode			
W-2 Eligibility Begin Date:	05/14/2020		
Episode Begin Date:	06/09/2020		
Episode End Date:	MM / DD / YYYY 🗓	Work Program End Reason 1:	[⌄] ▤
		Work Program End Reason 2:	[⌄] ▤
Individual Placement Information			Check for Non-CMF/+ Placement Eligibility

☐ **Step 5:** Enter today's date for the **Episode End Date** on the **W-2 Placement** page.
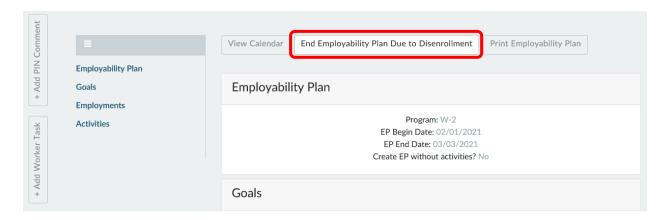
☐ **Step 6:** Enter **Case Comments** explaining eligibility determination and why the case is closing.

    o ***Example***: *Ana reported that she is moving to Rockford IL this week. I updated her address. Her W-2 case is now closed due to not living in WI.*
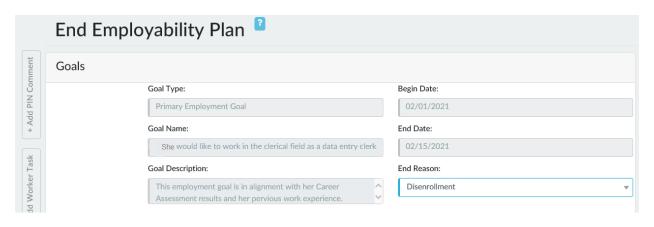
Disenroll from Work Programs

Ana has participated in her Job Retention activity. You record her participation. She states she did quit her current job to make this move. You also update her work history, end her Employability Plan, and disenroll her from work programs.

☐ **Step 1:** Enter all participation through closure/disenrollment date on the **Participation Calendar** to show that Ana has completed all assigned activities.

☐ **Step 2:** Enter **PIN Comments** documenting Ana's participation through closure/disenrollment.

☐ **Step 3:** End Ana's job at the chiropractic office.

☐ **Step 4:** Click on current EP from the **Employability Plans** page.

Step 5: Click on the End Employability Plan Due to Disenrollment button.

Step 6: End Ana's Primary Employment Goal with a DISENROLLMENT **End Reason**.

Step 7: End all remaining goals choosing the most appropriate **End Reason** for each goal.

Activities

Activity:	**Planned End Date:**
Job Retention Services	03/02/2021
Activity Description:	**Actual End Date:**
Meet with FEP to proactively address employment issues, work/life balance and resources to support continued	MM/DD/YYYY
Start Date:	**Completion Reason:**
02/01/2021	

Completion Reason:

A - Successfully completed
B - Incomplete/interrupted
D - Disenrollment
K - Failed to participate - not good cause
L - Inappropriate assignment
N - Activity ended due to CMF placement/employment
P - Completed appropriate formal assessment within prior 12 mo.
S - Participant receiving SSI
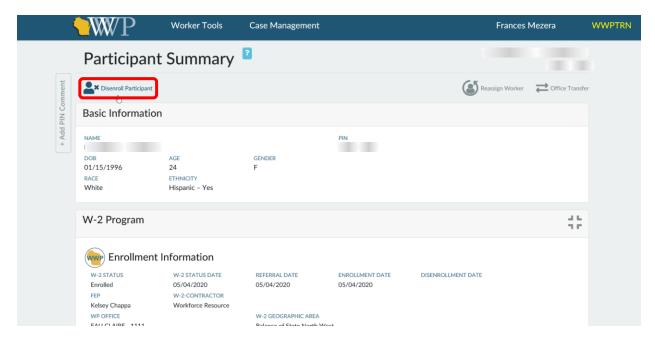V - Educational attainment and vocational training completion

☐ **Step 8:** End Ana's Job Retention Services activity with TODAY'S DATE as the **Actual End Date**

   o   If this activity has a future begin date, you must to delete it.

☐ **Step 9:** Select D – DISENROLLMENT as the **Completion Reason**.

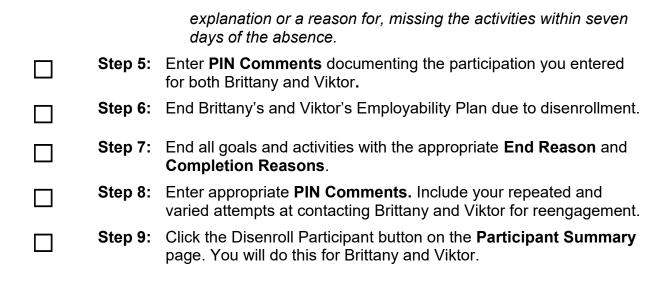☐ **Step 10:** Click the End Employability Plan button.

☐ **Step 11:** Click the Disenroll Participant button on the **Participant Summary** page.

☐ **Step 12:** Click Disenroll from the disenrollment window.

☐ **Step 13:** Enter **PIN Comments** documenting the actions you took to end Ana's EP and job, and explain your reasoning behind disenrolling her from Work Programs.

     o Example: *Ana reported that she is moving to Rockford IL this week. Her W-2 case is now closed due to not living in WI. I ended her job, her EP, and disenrolled her from work programs.*

You have completed Ana's case closure.

- Send an email to PTTTrainingSupp@wisconsin.gov.
- Subject Line: ***Ana Case Closure*** and Ana's Case/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

Neither Brittany nor Viktor have completed their assigned activities, nor have they attended any scheduled appointments. In addition to the mailed appointment notices you sent, you've called them, sent multiple text messages, and, together with your supervisor, conducted a home visit in attempts to reengage them in activities. Per policy, you sent them the Notice of Noncooperation with W-2 Requirements letter from CWW and gave them seven working days to respond. They did not respond and have lost contact with the agency, and you are closing the case for non-cooperation.

☐ **Step 1:** In CWW, enter an **Episode End Date** and a **Work Program End Reason** on the **W-2 Placement** page.

☐ **Step 2:** Run eligibility and confirm with **Closure Reason** 136 and/or 219.

☐ **Step 3:** Enter **Case Comments**.

☐ **Step 4:** In WWP, enter all participation through closure/disenrollment date on the **Participation Calendar** for both Brittany and Viktor to show they have not completed their assigned activities.

     o ***Note: You do not need to make a good cause determination because they have not notified you of, and provided an***

> *explanation or a reason for, missing the activities within seven days of the absence.*

☐ **Step 5:** Enter **PIN Comments** documenting the participation you entered for both Brittany and Viktor**.**

☐ **Step 6:** End Brittany's and Viktor's Employability Plan due to disenrollment.

☐ **Step 7:** End all goals and activities with the appropriate **End Reason** and **Completion Reasons**.

☐ **Step 8:** Enter appropriate **PIN Comments.** Include your repeated and varied attempts at contacting Brittany and Viktor for reengagement.

☐ **Step 9:** Click the Disenroll Participant button on the **Participant Summary** page. You will do this for Brittany and Viktor.

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

- Send an email to PTTTrainingSupp@wisconsin.gov.
- Subject Line: ***Brittany Case Closure*** 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:
- Close her case in CWW due to loss of contact.
- Enter her participation, end her Employability Plan, and enter PIN comments.
- Disenroll her from Work Programs.

Chantelle has missed her last four weekly Job Retention meetings with you. You sent her several emails, left phone messages, and mailed letters, including the Notice of Noncooperation with W-2 Requirements, that came back as non-deliverable. You've documented this in PIN comments. Due to these failed attempts to contact Chantelle, and her missed appointments, you close her case due to loss of contact with you and the W-2 Program.

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

- Send an email to PTTTrainingSupp@wisconsin.gov.
- Subject Line: ***Chantelle Case Closure*** and Chantelle's PIN.

A trainer will review your entries and provide feedback.