

# System Entry Guide: Case Closures

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## Purpose:

This guide provides hands-on learning of system entries for W-2 case closures and work program disenrollment.

## Learning Objectives:

- Complete case closure and end the W-2 episode in CARES Worker Web (CWW).
  - Disenroll cases from work programs.
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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: [bwfworkprograms@d@wisconsin.gov](mailto:bwfworkprograms@d@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.

# Introduction

We are at the final step in our case entries: case closure and disenrollment from work programs. Cases may close for eligibility reasons (such as being over income or assets, failing to verify information, moving out of state, receiving 12 months of CMF/+ services, etc.), for non-cooperation with program requirements (such as losing contact with the agency, failure to complete job search, not cooperating with requirements, etc.), or at the participant's request.

As you work through this System Entry Guide, determine why a case may close, take steps to end the W-2 episode in CWW, and disenroll the cases from WWP.

## Instructions for Using this Entry Guide

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1. Print a copy of this System Entry Guide: Case Closures.
2. Follow the instructions in this Guide step-by-step.
3. You will enter the Carmen case first, then the Haylee case.
  - a. The System Entry Guide: Case Closures provides the details for completing your entries.
  - b. If any information is not provided in the scenario, make it up.
4. Use CWW System Help any time you have a question about a page. Simply click the Help button on the top right of a page to access the Help for that page.
5. Use WWP Help Center any time you have a question about a page in WWP. The WWP Help Center is in the Worker Tools Tab of WWP.

**Contact [PTTTrainingSupp@wisconsin.gov](mailto:PTTTrainingSupp@wisconsin.gov) immediately with any problems, or if something does not work as explained in the instructions.**

# Symbols and Icons

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## System Icons



CARES Worker Web (CWW)



Wisconsin Work Programs (WWP)

## Training Icons



Access the **CWW Help** resources for specific questions. On any CWW page, clicking the **Help** button will open **System Help** for that page in a new window.



Contact PTT with any questions or concerns at [PTTTrainingSupp@wisconsin.gov](mailto:PTTTrainingSupp@wisconsin.gov)



**STOP** in the system entry process to review other materials, or to submit activities to PTT.

# Case Closures

As a reminder, the following is needed to complete the Closure portion of Initial New Worker Training.

<b>Complete in the Learning Center:</b>	<b>Make Entries in CWW and WWP:</b>	<b>Submit via Quia:</b>
<b>NWT Completion – Financial and Employment Planner</b>	<b>NWT Completion – Financial and Employment Planner</b> <input type="checkbox"/> Entry Guide: Case Closure  Case Name                      PIN Carmen                              _____  Haylee                                      _____	<input type="checkbox"/> W-2 Final Assessment for Financial and Employment Planner

Use this System Entry Guide to complete Case Closures.



Contact the Partner Training Team with any questions or concerns at [PTTTrainingSupp@wisconsin.gov](mailto:PTTTrainingSupp@wisconsin.gov).

# Carmen

## Case Closure

Carmen has been working for a while now and participating in her job retention appointments. You schedule a check-in. She informs you that she is moving this week to live with her grandma in Rockford, IL.

## Entries

### CWW

Household Address							Find Matching Cases
* County of Residence:		Populate with office address (for homeless Primary Persons)					
18 - EAU CLAIRE COUNTY							
Number	Unit	Direction	*St / Rural Rt / Box Number	Suffix	Quadrant	Apt	
1212		S - SOUTH	JEFFERSON				
Additional Address Info							
*City	*State		*ZIP		Phone		
EAU CLAIRE	WI - WISCONSIN		54701				
W-2 Geographical Area			Override W-2 Geographical Area				
BOS NORTHWEST							
*Address Verification			Post Office Suggested Address Verification				
			o				
Contact Information							

- Step 1:** Access Carmen's case in CWW.
- Step 2:** Enter Carmen's new address on the **General Case Information** page.

Individual Demographic Information	
<b>Effective Period</b>	
* Begin Month: 05 / 2020	Last Updated: 05/14/2020
<b>Individual Details</b>	
* Individual:	24F PP
* Identity Verification:	DR - DRIVER'S LICENSE
* Identity MA Verification:	
* SSN Cooperation:	
* Marital Status:	SI - SINGLE-NEVER MARRIED
* Verification:	NQ - NOT QUESTIONABLE
* Resides In WI:	Yes
* Verification:	MA - MAIL RECEIVED AT ADDRESS
* Intent To Reside In WI:	Yes
* Migrant Farm Worker:	No
* Verification:	NQ - NOT QUESTIONABLE
* Special Needs Child:	
* Verification:	
* Fleeing Felon Or In Violation Of Probation / Parole:	No
* Source:	
<b>Physical Exam</b>	
* Physical Exam Completed?	
* Good Cause:	
* Physical Exam Date:	MM / DD / YYYY
* Source:	
<b>Obsolete Information</b>	
* Offender Working Without Pay:	
* Verification:	

- Step 1:** Enter NO for **Resides in WI** and **Intend to Reside in WI** on the **Current Demographics** page.
- Step 2:** Run eligibility and confirm with Closure Reasons 238 and 239.

Record Management	
Last Updated:	06/09/2020
Episode Number:	1
Delete Reason:	
<b>W-2 Episode</b>	
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:	
<b>Individual Placement Information</b>	
Check for Non-CMF/+ Placement Eligibility	

- Step 1:** Enter today's date for the **Episode End Date** on the **W-2 Placement** page.
- Step 2:** Enter **Case Comments** explaining eligibility determination and why the case is closing.
  - o Example: *Carmen 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.*

## WWP

Participation Period: January 16 <sup>th</sup> 2021 - February 15 <sup>th</sup> 2021							
	Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
+ Add PIN Comment	10	11	12	13	14	15	16
+ Add Worker Task	17	18	19	20	21	22	23
	24	25	26	27	28	29	30
	31	1	2	3 JR- 1.0	4	5	6
	7	8	9	10 JR- 1.0	11	12	13
	14	15	16	17	18	19	20

- Step 1:** Enter all participation through closure/disenrollment date on the **Participation Calendar** to show that Carmen has completed all assigned activities.
- Step 2:** Enter **PIN Comments** documenting Carmen’s participation through closure/disenrollment.



		+ New Employability Plan
+ Add PIN Comment	W-2: Submitted Begin Date: 02/01/2021	Submit Date: 02/04/2021 End Date: 03/03/2021
	W-2: Worker Voided Begin Date: 02/01/2021	Submit Date: 02/02/2021 End Date: 03/01/2021
+ Add Worker Task	W-2: Worker Voided Begin Date: 02/01/2021	Submit Date: 02/02/2021 End Date: 03/01/2021
	W-2: Ended Begin Date: 09/16/2020	Submit Date: 09/16/2020 End Date: 01/31/2021
	W-2: Ended Begin Date: 08/16/2020	Submit Date: 08/16/2020 End Date: 09/15/2020
	W-2: Ended Begin Date: 08/01/2020	Submit Date: 08/01/2020 End Date: 08/15/2020

**Step 1:** Click on current EP from the **Employability Plans** page.

The screenshot shows the 'Employability Plan' page. At the top, there are three buttons: 'View Calendar', 'End Employability Plan Due to Disenrollment' (highlighted with a red box), and 'Print Employability Plan'. Below the buttons, the page title is 'Employability Plan'. The main content area displays the following information: Program: W-2, EP Begin Date: 02/01/2021, EP End Date: 03/03/2021, and Create EP without activities? No. On the left side, there is a sidebar with a menu containing 'Employability Plan', 'Goals', 'Employments', 'Activities', and 'Supportive Services'. At the bottom of the sidebar, there are two buttons: '+ Add PIN Comment' and '+ Add Worker Task'.

**Step 2:** Click on the End Employability Plan Due to Disenrollment button.

## End Employability Plan ?

+ Add PIN Comment

### Goals

**Goal Type:**

**Goal Name:**

**Goal Description:**

**Begin Date:**

**End Date:**

**End Reason:**

**Step 3:** End Carmen’s Primary Employment Goal with a **DISENROLLMENT End Reason**.

**Step 4:** End all remaining goals choosing the most appropriate **End Reason** for each goal.

### Activities

**Activity:**

**Activity Description:**

**Start Date:**

**Planned End Date:**

**Actual End Date:**

**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 5:** End Carmen’s Job Retention Services activity with **TODAY’S DATE** as the **Actual End Date**

- If this activity has a future begin date, you will need to delete it.

**Step 6:** Select **D – DISENROLLMENT** as the **Completion Reason**.

**Step 7:** Click the End Employability Plan button.

W-2 STATUS	W-2 STATUS DATE	REFERRAL DATE	ENROLLMENT DATE	DISENROLLMENT DATE
Enrolled	05/04/2020	05/04/2020	05/04/2020	

- Step 1:** Click the Disenroll Participant button on the **Participant Summary** page.
- Step 2:** Click Disenroll from the disenrollment window.
- Step 3:** Enter **PIN Comments** documenting the actions you took to end Carmen's EP and explaining your rationale behind disenrolling her from Work Programs.
  - Example: *Carmen 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 EP and disenrolled her from work programs.*



You have completed Carmen's case closure.

Send an email to [PTTTrainingSupp@wisconsin.gov](mailto:PTTTrainingSupp@wisconsin.gov) with:

- the subject line "**Case Closure and Disenrollment Carmen,**" and
- Carmen's Case/PIN

Feedback received for Carmen's case closure is helpful to complete Haylee's case closure.

# Haylee

Now you have an opportunity to complete a case closure and disenroll from work programs on your own. Remember, you can contact [PTTTrainingSupp@wisconsin.gov](mailto:PTTTrainingSupp@wisconsin.gov) at any time. Good luck!

## Case Closure

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Neither Haylee nor Luka have completed their assigned activities, nor have they attended any appointments that you have scheduled. You made repeated and varied attempts to contact them to reengage in activities. They have lost contact with the agency, and you are closing the case for non-cooperation.

### Entries

- Step 1:** Access Haylee's case in CWW.
- Step 2:** Enter an **Episode End Date** and a **Work Program End Reason** on the **W-2 Placement** page.
- Step 3:** Run eligibility and confirm with **Closure Reason** 136 and/or 219.
- Step 4:** Enter **Case Comments**.
- Step 5:** Navigate to WWP
- Step 6:** Enter all participation through closure/disenrollment date on the **Participation Calendar** for both Haylee and Luka to show they have not completed their assigned activities. You do not need to make a good cause determination because they have not notified you of, and provided an explanation of a reason for, missing the activities within seven days of the absence.
- Step 7:** Enter **PIN Comments** documenting your good cause determination for both Haylee and Luka.
- Step 9:** End Haylee's and Luka's Employability Plan due to disenrollment.
- Step 10:** End all goals and activities with the appropriate **End Reason** and **Completion Reasons**.
- Step 11:** Enter appropriate **PIN Comments**. Include your repeated and varied attempts at contacting Haylee and Luka for reengagement.

- Step 12:** Click the Disenroll Participant button on the **Participant Summary** page.



You have completed Haylee's case closure.



Send an email to [PTTTrainingSupp@wisconsin.gov](mailto:PTTTrainingSupp@wisconsin.gov) with:

- the subject line "**Case Closure Haylee,**" and
- Haylee's Case/PIN, and
- Luka's PIN

## Congratulations!

Congratulations, you did it! You took two cases from their Request for Assistance through case closure. In the process, you entered assessment information, determined eligibility, processed varied ongoing case changes, and reviewed eligibility. This is just the beginning.

As you transition into your job, continue to access the resources we discussed and reviewed along the way. Some resources to review include:

- The W-2 Policy Manual,
- Desk Aids (available in the PTT Learning Center), and
- Additional courses in PTT Learning Center.