

System Entry Guide: Reviews

Purpose:

This guide provides hands-on learning of system entries for W-2 eligibility reviews.

Learning Objectives:

- Record an eligibility review in CARES Worker Web (CWW).
 - Formulate case management plans that reflect changes in participant circumstances.
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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.

Introduction

So far, you've covered a lot of case processes (client registration, informal assessment, eligibility determination), and began ongoing case changes. All of those processes provide you with the knowledge and skills you need to conduct a case review.

In this Entry Guide, you learn about eligibility reviews and conduct an eligibility review for both of your cases.

Instructions for Using this Entry Guide

1. Print a copy of this System Entry Guide: Reviews.
2. Log on to the CWW Training environment: <https://trn.cares.wisconsin.gov>
3. Follow the instructions in this Guide step-by-step.
4. You will enter the Carmen case first, then the Haylee case.
 - a. The System Entry Guide: Reviews provides the details for completing your entries.
 - b. If any information is not provided in the scenario, make it up.
5. 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.

Contact PTTTrainingSupp@wisconsin.gov immediately with any problems, or if something does not work as explained in the instructions.

Symbols and Icons

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



PAUSE your current entries by not submitting the EP. Continue to the next section of the entry guide and send an email to PTT when instructed.




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

Reviews

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

Complete in the Learning Center:	Make Entries in CWW and/or WWP:						
Ongoing Processes Module 4 <input type="checkbox"/> W-2 Eligibility Review in CARES Worker Web (CWW) Desk Aid	NWT Ongoing Processes Module 4 <input type="checkbox"/> Entry Guide: Reviews <table> <tr> <td>Case Name</td> <td>PIN</td> </tr> <tr> <td>Carmen</td> <td>_____</td> </tr> <tr> <td>Haylee</td> <td>_____</td> </tr> </table>	Case Name	PIN	Carmen	_____	Haylee	_____
Case Name	PIN						
Carmen	_____						
Haylee	_____						

Use this System Entry Guide to complete Reviews.

 Contact the Partner Training Team with any questions or concerns at PTTrainingSupp@wisconsin.gov.

Carmen

Review

It is time for Carmen’s six-month eligibility review. You and she are able to meet in person to conduct this review. Carmen continues to work part-time at the elementary school. The job is going well, and Carmen states she is happy with her work. She provides her most recent paystubs, which show her income and hours have not changed. She also provides her bank statement. Carmen decided to open a savings account in addition to her checking account. Her current checking account balance is \$350, and her current savings account balance is \$75. Lucia continues to attend school and Carmen provides her attendance records.

You also discuss her goals and activities. Carmen continues working toward her employment goals. She is making progress towards reaching her HSED and plans to take her final tests within the next few weeks. She says she’s still reading to Lucia three nights a week. She meets regularly with the Job Developer to review leads and to prep for the interviews when she gets call backs. She has moved onto the Excel courses online. You both decide to leave her EP as is for the time being.

Entries

CWW Home Page

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: /

- Step 1:** Access the **Case Summary** page for Carmen.
- 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.
 - CWW navigates through the pages necessary to complete the review.
- Step 5:** Enter verification of required information.
 - Pay close attention to the **School Enrollment, Employment** page and **Asset Gatepost**.
- Step 6:** Run eligibility and confirm the passing eligibility determination.
- Step 7:** Enter comments on the **Case Comments** page to summarize the changes and note the review.
 - Select the RENEWAL/SMRF comment type.
 - Example: *I completed a six month review today with Carmen. Her household still consists of her and her daughter, Lucia. Carmen continues to work at Clay Lamberton Elementary School part-time. I verified this with paystubs, and all her hours and wages are the same. She reports no other earned or unearned income. Carmen opened a savings account and still has her checking account. I verified both accounts with a bank statement. Carmen 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. Lucia is still doing well in school. I verified this with school and attendance records. The W-2 case remains open and passing.*

WWP

- Step 1:** Enter **PIN Comments** to summarize the completion of the eligibility review and discussion about her EP.
- Select the APPOINTMENT – OTHER **Comment Type**.
 - Example: *Carmen and I completed her six month review today. Carmen is still employed part-time at Clay Lamberton Elementary School. The job is going well and she is happy with her work. Employers have started calling her back for interviews, but she hasn't received any other job offers. She continues to work with the Job Developer to prep for interviews. Carmen 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 that they are helpful. We decided to leave her EP as is for now.*



You have completed Carmen's review. **Do not continue processing this case.** Further CWW and WWP entries are made in a later course.

Send an email to PTTTrainingSupp@wisconsin.gov with:

- the subject line "**Review Carmen,**" and
- Carmen's Case/PIN number

Feedback on Carmen's review is helpful to complete Haylee's review.

Haylee

Now you have an opportunity to complete a review for Haylee. Repeat the process you used for Carmen to complete the review. Remember, you can contact PTTTrainingSupp@wisconsin.gov at any time. Good luck!

Review

Haylee and Luka attend their review appointment. They report Parker's child support amount has increased to \$225 a month. Haylee now has \$130 on her prepaid debit card, and she provides a bank statement for verification. There is no change to her savings account. She reports no change in her employment and has recent paystubs with her.

Parker continues to attend school. Haylee provides you with attendance records.

Luka states things are going fine at work. He reports that his hours and pay remain the same, and he provides his most recent paystubs. Luka still wants to get a certification in auto mechanics. He feels that will help him expand his opportunities for growth.

Haylee's part time job at Parker's school working in the office continues to go well. She can check on and observe Parker before and after her shift. She has had no problems learning the tasks she is responsible and is enjoying it. Haylee wants to attend and complete a beginners Yoga series at the YMCA.

Entries

CWW

- Step 1:** Access the **Case Summary** page for Haylee.
- 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.
 - CWW navigates through the pages necessary to complete the review. Using the information in Haylee's scenario, make updates to unearned income and assets.
- Step 5:** Run eligibility and confirm the passing eligibility determination.
 - Check the box to Ignore W-2 income and asset tests to allow CMF/+ Placements to begin.

- Step 6:** Enter comments on the **Case Comments** page to summarize the changes and note the review.
- Select the RENEWAL/SMRF comment type.

WWP

- Step 1:** For Haylee, create a new EP and add her new goal based on information in the scenario.



Do **not** submit Haylee's EP yet. A trainer will tell you when to submit the EP. Continue to Step 2.

- Step 2:** Enter PIN comments for Haylee and Luka to summarize the review and any changes.



You have completed Haylee's review. Further CWW and WWP entries are made in a later course. **Do not continue processing this case.**



Send an email to PTTTrainingSupp@wisconsin.gov with:

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

Conclusion

An eligibility review is mandatory at least every six months. But remember, any changes to the case or to the circumstances also require entries and possibly a re-determination of eligibility. Review the EP before it is set to expire in order to discuss goals and assigned activities, and determine whether adjustments are needed.