

# *Trainer's Notes*

## **CWW**

### **Troubleshooting: How To Get The System To Work For You – Webinar**

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#### **Purpose**

To assist learners in troubleshooting in CARES Worker Web (CWW).

#### **Objectives**

Upon completion of this course, you will be able to:

- Summarize problem-solving techniques in CWW; and
  - Interpret and resolve common errors in CWW.
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**Materials**

- Trainer's Notes printed in color
- Trainer computer with internet access
- WAMS ID and password
- PTT Zoom account Username and Password
- Completed Harriet case
- CWW Troubleshooting PowerPoint

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**Trainer Prework**

Prior to the webinar, create the Harriet case (TN Appendix A 23).

Create the following poll in Zoom:

On a scale of 1 to 10, with 10 being you're nailing this page and 1 being there's lots of room for improvement, how comfortable do you feel problem-solving this page?

- 1
- 2
- 3
- 4
- 5
- 6
- 7
- 8
- 9
- 10

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**Suggested Pace**

This is a 1.5-hour webinar. The following agenda is the suggested pace.

5 minutes	Welcome
5 minutes	CWW Basics
50 minutes	Common Problem-Solving Areas
25 minutes	Failure Codes
5 minutes	Closure

## Welcome

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**Note to Trainers:** Turn on your webcam. If you notice someone doesn't have a camera, let them know to use their Reactions tab. Anyone with a camera listed, have them turn it on.

Welcome to CWW Troubleshooting: How to Get the System to Work for You. Have you ever found yourself with a failing case you know should pass eligibility? Raise your hand if you've been there.

What about one of those cases where the income just won't calculate correctly? Raise your hand if that's you. It's frustrating, right?

We've all been there at one point or another, stuck and discouraged that we can't get CWW to do what we want it to do.

We are here to help with CWW Troubleshooting. In this webinar, we teach you how to interpret and resolve common errors in CWW to ensure families receive the appropriate benefits. We summarize problem-solving techniques and strategies to get CWW working for you. You will have the opportunity to see us navigate errors in the system and put strategies into practice to resolve these errors.

This webinar is aimed at helping you. As we go through our topics today, feel free to pull out a notebook or a Word document to record your takeaways. If at any point you need us to slow down or pause, just let us know.

Without further ado, let's get rolling and start talking about the basics of CWW.

## CWW Basics

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CWW is programmed to think depending on the information entered. It always will do what it is told, even if you didn't mean to tell it to do that. Because of this programmed functionality, it is usually right.

**Ask** So, what do you do when CWW gives you a result you aren't expecting? Unmute and let us know.

It sounds like you all begin troubleshooting, or problem-solving! Knowing how CWW thinks helps you do this. CWW tests eligibility in a linear fashion. First, it looks at the non-financial criteria to determine if the W-2 group could be eligible for W-2. After making that determination, it then tests the financial criteria: assets and income.

Keep in mind, once CWW determines that a W-2 group is not eligible for W-2, it will not complete the remaining tests. For example, if it determines there are no children in the household, it will not perform the financial tests. This is important to keep in mind after you run eligibility and the case unexpectedly fails. We will take a closer look at those failure reasons later in this webinar.

Knowing how CWW thinks is just the first step when you need to problem-solve. The next step is knowing how to navigate, and update, a variety of areas within CWW. The six areas that require the most problem-solving include non-financial, asset, income, eligibility, W-2 group, and pending cases.

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## Common Problem-Solving Areas

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### PPT 1

**Note to Trainer:** Turn off your webcam and instruct learners to do the same. After you begin sharing your screen, hide the names of annotators.

This webinar is unique in that you have the power to choose what we discuss. We just pulled up a whiteboard with six areas. You will get a chance to choose which areas we discuss today.

- Non-financial includes a rundown of the pages that collect non-financial information. We will talk about fields that require a little extra attention and how those fields impact what CWW looks for.
- Assets includes what to examine when there is an issue with the asset limit test. We also will look at how to ensure you don't accidentally undercount assets.
- Income includes useful tips to help you make sense of some of those tricky income issues. We will talk about navigating overrides, pay frequency, employment page defaults, and more.
- Eligibility includes a more in-depth look at how CWW thinks and functions in determining eligibility when income and assets have been ignored.
- W-2 group includes where to look to see who's included in the W-2 assistance group. Learn which pages in CWW help you correct any assistance group errors.
- Pending cases includes tips on where to look when a case is unexpectedly pending.

Use your star annotation tool to pick the topic you want to learn more about today. We will discuss the topic with the most votes first, then move on to the topic that got second place, and so on. Pick only one topic to star. There are XX of you in this webinar, so I am looking for XX stars on the screen.

**Note to Trainer:** Wait until all learners have put a star on the screen. Tally up and record the results, then clear the annotations. Go through the top three topics. If there is enough time, cover additional topics. Make sure to leave 30 minutes for the remainder of the webinar. After covering the topics, pick up on TN 21.

Based on your votes, we're covering XX first today, then we'll cover XX and XX.

**Note to Trainer:** Navigate to the page in the TN that contains the content for the section you are covering. Pull up your Harriet case in CWW Training Environment to use for the remainder of the training. Anytime it doesn't specifically state to show the PPT, you are in the CWW Training Environment.

**Note to Producer:** Put how to find the thumbs down reaction in the chat the first time learners are instructed to give a thumbs up or thumbs down reaction.

- 👉 Non-Financial TN 6-10
- 👉 Assets TN 10-13
- 👉 Income TN 13-15
- 👉 Eligibility TN 16-18
- 👉 W-2 Group TN 18-19
- 👉 Pending Cases TN 20

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### Non-Financial

How many non-financial criteria are there for W-2? It's okay if you are unsure. Unmute and shout out your best guess.

*Answer: 25*

That is a lot of criteria to remember! No wonder sometimes we have to do a little bit of problem-solving in CWW when it comes to entering it all. Let's go through some of the criteria that need a little extra attention and where they are found in CWW.

Up first is the **Household Members** page. Birth Date, SSN, and corresponding verifications are found on this page. Often, this page is already completed by an Income Maintenance, or IM, worker. Ask applicants and participants to provide the information and confirm that what is entered here matches for each individual. Other programs may require different verifications, so double check that the birth date **Verification** is allowable for W-2 and matches the verification scanned into ECF. You only need to verify the information on this page once in a lifetime, so look in ECF to see if the applicant or participant has previously provided appropriate verifications.

Next, let's move on to the **Household Relationships** page. This page is important because it not only tells CWW if the case meets the custodial parent criteria, but also what to look for on the **Absent Parent** page. If you get unexpected results on that page or get a message that there is no custodial parent in the household, start problem-solving here on the **Household Relationships** page.

I'm pulling up a polling question for all of you to answer. On a scale of 1 to 10, with 10 being you're nailing it and 1 being there's lots of room for improvement, how comfortable do you feel problem-solving this page? Choose your response and submit.

**Note to Trainer:** Do not share the poll results. You may need to scroll down in the poll to view all the responses. If most of the class rates themselves as a seven or less, continue with the information in purple. If most of the class rates themselves as an eight or higher, jump to the information in black. Clear the poll.

Begin by double checking that the applicant's or participant's relationship with the other household members is correct. If there is another parent in the household, navigate to their page next. CWW uses the relationship field to determine how many **Absent Parent** pages are needed. We're going to go through a few different father relationships and how they affect the **Absent Parent** page. Using your reaction tab, give me a thumbs up if the relationship would cause CWW to require an **Absent Parent** page, or give me a thumbs down if it wouldn't.

We'll begin at the top of the drop-down with acknowledged father who's living in the home. Thumbs up or thumbs down?

This would be a thumbs down. CWW does not require an **Absent Parent** page for this relationship. Acknowledged fathers have voluntarily acknowledged that they are the parent, so paternity has been established.

Up next is claimed father who's living in the home. Thumbs up or thumbs down? This would be thumbs up. In instances of claimed fathers, paternity has not been established, so an **Absent Parent** page is needed.

How about legal/adjudicated father who's living in the home.? This would be a thumbs down. This relationship means the father is on the birth certificate, or paternity was established through a court order.

The last father type we are going to discuss is stepfather who's living in the home. Thumbs up or thumbs down? This would be thumbs up. A stepfather has no legal parentage to the child, so an **Absent Parent** page is required.

If the relationships are correct and you still need to do some problem-solving, move on to the child(ren)'s pages. Confirm that YES is selected for the **Has Legal Custody of** fields. You must enter YES for at least one child for the case to pass eligibility. Additionally, if CWW is asking for an extra **Absent Parent** page, double check that the applicant or participant is listed as having legal custody. Remember, parents have legal custody of children, not the other way around. Coding a child as having legal custody of a parent will cause problems.

Remember to review all household relationships with applicants and participants, even when the page has been completed previously. Review the relationships and legal custody for each W-2 group member. Check out the **Case Information Summary** page to quickly view all group members, relationships, and custody.

**Ask** What questions do you have about the non-financial criteria found in the **Case Information** section?

Let's move on to the **Individual Demographics** section and look at the **Permanent Demographics** page. Like the **Household Members** page, you only verify some information, such as U.S. Citizenship, once per lifetime. Double check that the information entered is correct and verification is in ECF. Other information, such as exemptions and SSN applications, are less common and often require some problem-solving.

Using your star annotation tool, mark the field you would like us to talk about in more detail. If you are confident about all the fields on this page, star Current Demo in the **Navigation Menu**.

**Note to Trainer:** Provide the information in purple below based on where learners star. Even if there is only one star next to the field, cover it. Focus on the fields below. Do not discuss the other fields unless a specific question is asked. If there are no stars next to the fields on this page, move on to the information in black.

### Birth Query

You can use Birth Query to verify U.S. Citizenship for individuals born in Wisconsin. You must enter the **State File Number** when you enter Birth Query as the U.S. Citizenship **Verification**. You can perform a Birth Query search by using the button on this page or by navigating to the **Data Exchange Query** page from the **Worker Tools** section of the **Navigation Menu**.

### SSN Application Date and Verification

An **SSN Application Date** and **Verification** are required when there is no SSN on the **Household Members** page. Usually, applicants and participants receive a receipt that they applied for an SSN. You can use this as the **Verification**. You do not need this information for individuals who are initially exempt from providing an SSN. After they receive the SSN, go back and enter it on the **Household Members** page.

### SSN Override Verification

Use this field to pend a case for an SSN. You may need to pend the case when the applicant or participant has not provided an SSN, or the application of an SSN, or when the data exchange with the Social Security Administration does not verify the information the applicant or participant has provided. Using this field to pend the case tells the applicant or participant what proof they need so they can receive benefits. Do not use this field to pend for an SSN application of a newborn.

### W-2 Initial Exemption and W-2 Initial Exemption Date

Not all W-2 applicants and participants need to have an SSN. Individuals who are Cuban/Haitian entrants, certified, foreign-born victims of trafficking, aliens paroled into the U.S. under the Immigration and Nationality Act, certain battered aliens, and qualified non-citizens may be initially exempt. For these individuals, select YES from the drop-down and enter their exemption date.

Up next is the **Current Demographics** page. You must enter several non-financial criteria here. This page is a good place to start problem-solving because we enter so much information here. We're going to pull up our polling question again. On a scale of 1 to 10, with 10 being you're nailing this page and 1 being there's lots of room for improvement, how comfortable do you feel problem-solving the **Current Demographics** page? Choose your response and submit.

**Note to Trainer:** Do not share the poll results. You may need to scroll down in the poll to view all the responses. If most of the class rates themselves as a seven or less, continue with the information in purple. If most of the class rates themselves as an eight or higher, jump to the information in black. Clear the poll.

You need to verify identity for adult W-2 group members only once per lifetime. It is likely that the applicant or participant has provided some sort of verification in the past if they received assistance before. Take a look in ECF for valid verification. Driver's Licenses and Photo IDs are two of the most common ways to verify identity, but those aren't your only options.

**Ask** What else can you use to verify identity? Unmute and shout it out.

*Answer: State Issued ID Card, Student ID, U.S. Government ID Card, Military ID Card, Native American ID Card or tribal membership documentation, U.S. Passport*

Because W-2 is Wisconsin's TANF program, W-2 group members need to reside in Wisconsin and intend to stay in Wisconsin. Be sure to select YES for both of these fields when applicants and participants live here and plan to keep it that way.

A field that FEPs commonly need to revisit when problem-solving is **Living Arrangement Type**. This field should read 01 – INDEPENDENT (HOME/APT/TRLR) when all W-2 group members are currently in the home.

Keep in mind, a NO response for **Resides in WI** or **Intent to Reside in WI** for the primary person causes the case to fail. Additionally, a NO response to those questions or a **Living Arrangement Type** other than 01 – INDEPENDENT (HOME/APT/TRLR) for a child removes them from the W-2 group. If there is a NO response for all children on the case, the case fails.

Because there are so many drop-down boxes on this page, it is easy to scroll and accidentally select the wrong response. It is best practice to take a moment to review this page for each individual prior to moving on.

**Ask** What questions do you have about the non-financial criteria found in the **Individual Demographics** section?

There are two more pages that sometimes require a bit of problem-solving: the **School Enrollment** page and the **Absent Parent** page. The **School Enrollment** page is important for determining Learnfare status and referrals. The top section of the page

covers the child's basic school information such as their **Highest Level of Education Completed** and **Enrollment Status**. If the child is nearing graduation, you must enter the **Expected Date of High School Graduation**.

At the bottom of the page is the **W-2 Learnfare Monitoring** section. As you can see, CWW lists the Issuance Month and Participation Period. If there is data missing for a period in which you are running eligibility, you may need to come back here to add information for an additional month.

Finally, let's head over to the **Absent Parent** page. If your problem-solving brought you to this page, you may need to visit the **Caretaker Relative Cooperation Information** section. This is where you enter child support cooperation information. If **Cooperation** reads NO, you are unable to change it. Instead, head over to KIDS to review the Child Support Agency (CSA) information and reach out to the participant.

That covers our non-financial criteria problem-solving tips. **Ask** What additional questions do you have regarding entering non-financial criteria in CWW?

-  Assets TN 10-13
-  Income TN 13-16
-  Eligibility TN 16-18
-  W-2 Group TN 18-19
-  Pending Cases TN 20
-  Failure Codes TN 21

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## Assets

Typically, you end up problem-solving assets when you expect the case to pass, but it fails the asset limit test. Keep in mind, the asset limit test applies to the W-2 group as a whole, so it's important to review all asset pages, including children's assets.

Begin by navigating to the **Asset Summary** page. Review all information you entered, including the **Self-Reported Amount**. Looking at our screen, what might be an inaccurate entry? Use your draw annotation tool to circle it.

It is unlikely that this participant has \$10,000 in their savings account. Instead, it is likely that the FEP entered too many zeros in the **Self-Reported Amount** field.

You may need to problem-solve on other asset pages as well. Using your star annotation tool, mark the page you would like us to talk about in more detail from the **Navigation Menu**. You may select more than one. If you are confident on all pages, star the CWW Training Environment logo.

**Note to Trainer:** Provide the information in purple below based on where learners star. Even if there is only one star next to the field, cover it. If there are no stars next to the pages, move on to the information in black.

## Liquid Assets

Confirming that you have entered the correct amount in the **Self-Reported Amount** field is just one way to problem-solve on this page. Double check that the asset is under the correct **Individual** and **Type**. Check the **Available?** field. Only select NO if the individual does not have access to the asset, meaning they cannot access it for 31 or more days.

If participants do not pass eligibility due to being over the countable asset limit, you must ask if they received a federal tax return refund in the previous 12 months. If participants still have the tax return, you must subtract the refund amount from the **Self-Reported Amount** on this page and request the appropriate verification.

For example, Harriet reports that she has \$3,000 in her checking account, which you verify with a bank statement. You run eligibility, and Harriet fails for being over the asset limit. You ask if she has received a federal tax refund, and she says she received a \$1,000 refund last month, which she hasn't spent yet. She provides a copy of her tax return showing the amount she received. You change the **Self-Reported Amount** to \$2,000, and rerun eligibility. Harriet now passes the asset limit test and is eligible for W-2.

Keep in mind, you must enter detailed **Case Comments** explaining the actions you took regarding the federal tax refund.

## Vehicle Assets

There may be times when you need to problem-solve on the **Vehicle Assets** page. It is important to always enter both the **Fair Market Value** and the **Amount Owed** for CWW to correctly evaluate if the case passes the asset limit test. Remember, CWW automatically disregards the first \$10,000 of total vehicle assets.

## Real Property Assets

When participants own a home, land, or other type of property, you must enter it on the **Real Property Assets** page. The key field to problem-solve on this page is **Residence?**.

Homes in which participants live and use as their primary residence are excluded as an asset when the home's value is no more than 200% of the statewide median value. To determine the statewide median home value, navigate to the Wisconsin Realtor Association's, or WRA's, Wisconsin Housing Statistics page, locate the median price for the previous year, and multiply it by two. For example, the median price of a home in 2021 was \$240,000, so you would use \$480,000 as 200% of the statewide median in 2022.

To determine participants' home value, you may use a variety of different sources, including appraisals, recent final sales documents, and online valuation tools like Zillow.

You do not need to compare participants' home value with 200% of the statewide median value when they meet one of the hardship criteria. See W-2 Manual 3.3.4.1 for more information.

Select YES from the **Residence?** drop-down when participants are living in the home and using it as their primary residence, and it is valued under 200% of the statewide median. A selection of NO tells CWW to count the value of the home in the asset limit test.

### Personal Property Assets

Some participants own personal property of exceptional value, such as a coin collection. Keep in mind, although some collections may have emotional value, they may not have monetary value. Be sure to evaluate the actual monetary value of the personal property when entering the **Amount** on this page.

### Burial Assets

Pay close attention to the **Available?** field on the **Burial Assets** page. Select NO when the participant cannot readily convert the burial asset to cash. This tells CWW to ignore the value in the asset limit test.

### Lump Sum Received

There may be times when participants receive a lump sum payment. **Ask** What types of lump sums have you seen participants receive? Unmute and shout it out.

*Possible responses: child support arrears, home sale, inheritance, insurance settlement, lawsuit settlement*

The key to problem-solving on this page is to include all offsetting expenses. Offsetting expenses are any expenses that must be paid to someone else that subtract from the participant's amount received. For example, Harriet received a \$6,000 lump sum from a motor vehicle accident lawsuit. \$3,000 of the lump sum is ordered for medical expenses, and \$1,500 was automatically given to her lawyer for legal fees. For Harriet's **Lump Sum Received** page, you enter a **Gross Amount** of \$6,000, and then two offsetting expenses. This tells CWW to count only \$1,500 from the lump sum in the asset limit test.

### Life Insurance Assets

Pay close attention to what you enter for the **Face Value** and the **Cash Surrender Value** fields when problem-solving on the **Life Insurance Assets** page. The **Face Value** is the amount payable upon the death of the insured individual. CWW does not use this amount in the asset limit test. Instead, it uses the **Cash Surrender Value**, which is the amount payable to the individual if they surrender the policy. Be sure to obtain verification of the **Cash Surrender Value**, not the **Face Value**.

These are just a few of the areas to look at when you expect a case to pass the asset limit test, but it fails. However, it is just as important not to undercount assets.

**Ask** What impact does undercounting assets have on applicants and participants?  
Unmute and let us know.

*Answer: They are inaccurately found eligible, causing an overpayment they must repay.*

There are two main places to look if you believe you may be undercounting assets. First, double check that the answer to the **Available?** fields is YES. A NO response tells CWW not to count the asset when performing the asset limit test.

You also need to be careful with jointly owned assets. CWW may count only half of the asset value if they are not entered correctly. This typically occurs in two-parent households, where both adults have joint ownership of an account (checking, savings, etc.) or a vehicle. For jointly owned assets, begin by selecting YES for **Jointly Owned?** This makes the Jointly Owned Assets section required. If the joint owner is part of the household, select them from the **Individual** drop-down to auto-populate the **First Name** and **Last Name** fields. Then, enter the appropriate **Verification** and add it to the dynalist. Notice there is an Automatically create asset page for joint owners in the household checkbox. This checkbox is always disabled, so you must click the Add New Information button to manually enter the asset page for the joint owner. If you do not enter the second page, CWW will count only a portion of the asset. Be sure to enter the full amount of the asset so CWW makes the correct determination.

**Ask** What questions can we answer regarding problem-solving for assets?

-  Non-Financial TN 6-10
-  Income TN 13-16
-  Eligibility TN 16-18
-  W-2 Group TN 18-19
-  Pending Cases TN 20
-  Failure Codes TN 21

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## Income

Trying to problem-solve income can leave you scratching your head. More often than not, you end up here when the income amount you expected the case to have is different than the actual amount.

Remember, CWW counts all earned and unearned income of all W-2 group members when determining the 115% gross income test unless it is specifically disregarded. So, it's important to review all income pages, including children's income.

Begin by navigating to the **Employment Summary** page. Review all information you entered, including the **Converted Amount**. Looking at our screen, what might we need update if our participant currently is working and receiving income? Use your draw annotation tool to circle it. *Possible Response: Learners mark that there is \$0.00 income counted.*

When a participant is working and receiving wages, we know CWW should calculate income. In this case it is likely that \$0.00 was incorrectly left in the **Override Converted Amount** field.

If everything looks great on the employment pages, your next place to check for income errors is on the **Unearned Income Summary** page. On this page, check that the amount calculated in the **Monthly Converted Amount** field is what the participant reported to you. If it is not, you have a bit more sleuthing to do.

On the **Unearned Income** page, first double check that the income is under the correct **Individual**. Next, check the **Frequency Period** field to make sure the income frequency is correct. If the individual has access to the income, be sure you have selected YES in the **Available** field. And finally, check that the amount listed in the **Gross Income Amount** field is, in fact, the amount the individual receives per the frequency you entered.

## PPT 2

You may need to problem-solve other areas on these pages as well. Let's dive a little deeper into the income-related pages. Using your star annotation tool, mark the income topic you would like us to talk about in more detail. You can mark more than one topic. If you are confident on all pages, star N/A.

**Note to Trainer:** Provide the information in purple below based on where learners star. Even if there is only one star next to the field, cover it. If there are no stars for any of the topics, move on to the information in black.

## Entering Income Under the Appropriate Individual (Unearned Income page)

Pay close attention to who you are listing as the individual receiving income in the W-2 group. For example, child support income is assigned to a child in the W-2 group, not to the parent. When creating the **Unearned Income** page for child support income, the individual listed to receive the income must be the child. Properly assigning the income to the correct individual in the household tells CWW if income needs to be counted or disregarded.

## Overrides (Employment page)

Calculating an accurate prospective budget isn't always easy. We often run into instances where applicants or participants have \$0 income, inconsistent income, and/or

a partial month's income for a period of time. This means that from time to time, you need to manually calculate income and enter overrides. Examples of this include maternity leave, starting or ending employment, and staffing assignment changes.

Enter overrides in the **Override Converted Amount** field. This field tells CWW to count an amount different than what is in the **Monthly Converted Amount** field. Essentially, you are telling CWW to ignore the **Detailed Wage Information** section and count only the income listed in the **Override Converted Amount** field in W-2 eligibility determination.

Let's use ending employment as an example. You need to determine when the applicant or participant receives their last paycheck, and how much it will be. Knowing when the individual receives the last paycheck helps you determine if you need to enter an override for current or future months.

For example, Harriet reports her employment is ending on March 5. She is paid bi-weekly and will receive her last check for \$514 on April 5. **Ask** How would you build Harriet's employment pages in CWW to reflect her income accurately?

*Answer: March would be a full month's income with no override; April would have \$514 in the **Override Converted Amount** field; May would have \$0 entered in the **Override Converted Amount** field.*

Before we forge ahead, are there any other questions about overrides?

### **Pay Frequency/Average Hours per Pay Period (Employment page)**

Confirming that you've determined the appropriate hours and wage information in the **Detailed Wage Information** section is one way to problem-solve income inconsistencies.

Remember, the **Pay Frequency** field determines how CWW calculates the information you enter in the **Detailed Wage Information** section. This includes the **Rate Per Hour** field and the **Wage Type** field.

When entering the average hours per pay period, it is important to keep in mind the pay frequency. Typically, we use hours per week; however, this section is for hours per pay period and may be different.

### **Employment Page Defaults (Employment page)**

Understanding how CWW thinks and works is crucial to problem-solving your cases. This is especially true for the **Employment** page. **Employment** page defaults might seem like a simple topic, but it's easy to mix up employment sequences if you aren't sure how CWW thinks.

When you click on an employment sequence, CWW automatically displays information with the date the furthest out. This is because CWW determines program eligibility for

future months. For example, if we have employment data for the months of April, May, and June, CWW displays the June data when you click on the **Employment** page. In order for you to go back and view the April and May data, you must click the Previous Effective Month button.

Let's take a look at our Harriet case. When we click on the **Employment** page, CWW defaults to the employment data for June. **Ask** What would we do if Harriet's employment suddenly ended, and she will no longer receive income for May and June?

*Answer: We would update the June employment sequence with \$0.00 income. Then we would hit the Previous Effective Month button to navigate to Harriet's May employment sequence. We would update that employment sequence with \$0.00 income.*

**Ask** In what field would we enter the \$0.00 income for May and June?

*Answer: **Override Converted Amount** field*

## Self-Employment

Pay close attention to who you are listing as the individual receiving income in the W-2 group. Determine the **Business Ownership Type** and the **Business Type**. If the individual receives wages from a corporation owned by another W-2 group member, it is considered employment, not self-employment, and belongs on the **Employment** page.

Enter the remaining required fields in the **Additional Information** section. Click the Display Tax/SEIRF Results button for CWW to determine which type of self-employment verification is needed.

After you receive verification, come back and enter the **Gross Income** and **Gross Expenses**. Check out W-2 Manual 3.2.8.2 for more information about what constitutes self-employment and a significant change.

These are just a few of the areas to look at when you expect a case to pass the gross income test, but it fails or has income amounts you weren't expecting.

**Ask** What impact does miscalculating income have on applicants and participants?

Unmute and let us know.

*Answer: They are inaccurately found eligible, causing an overpayment they must repay. Incorrect income calculations may cause participants to receive other benefits in error, like Foodshare; they could be found ineligible in error and not receive needed services.*

 Non-Financial TN 6-10

 Assets TN 10-13

 Eligibility TN 16-18

 W-2 Group TN 18-19

👉 Pending Cases TN 20

👉 Failure Codes TN 21

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## Eligibility

Eligibility determination can be one of the most confusing areas in CWW. It is the process of comparing all the non-financial and financial information to program limits and determining whether a group is eligible for W-2.

CWW uses the information you enter to determine eligibility **when** you tell it to and will use that information **until** you tell it to stop. Sometimes, a case fails financial eligibility when you are expecting it to pass or passes when you expect it to fail. It's crucial that you don't confirm a case in error, so let's look at some steps you can take to ensure you are running eligibility and confirming cases correctly.

☀ PPT 3

Let's take a more in depth look at Eligibility. Using your star annotation tool, mark the eligibility topic you would like us to talk about in more detail. You may select more than one topic. If you are confident on all topics, star N/A.

**Note to Trainer:** Provide the information in purple below based on where learners star. Even if there is only one star next to the field, cover it. If there are no star for the topics, move on to the information in black.

### Eligibility: Ignoring Income and Assets

When you check the **Ignore W-2 income and assets test to allow CMF/+ Placements to begin** box, you are changing how CWW determines eligibility for your case.

How do we know CWW is ignoring income and assets when we run eligibility? We've got a couple of places to check. First, we navigate to the **Initiate Eligibility** page to see if the **Ignore W-2 income and assets test to allow CMF/+ Placements to begin** box has been checked.

**Note to Trainer:** Click Eligibility → Eligibility Results → Eligibility Summary to navigate to the **Eligibility Summary** page.

The **Eligibility Summary** page also provides two great resources for checking to see if income and assets have been disregarded by using the check boxes for the Income and Asset Results.

Checking the box for Asset Results on the **Eligibility Summary** page navigates you to the **Asset Determination Summary** page. Here you see all the W-2 group's assets listed individually compared to the asset limit, along with the Assets Eligibility Determination Results.

Checking the box for the Income Results on the **Eligibility Summary** page navigates you to the **W-2 Budget** Page. On the **W-2 Budget** page, you view the detailed calculations that CWW used to determine what income and assets are countable for the W-2 group. The **Result** section indicates if the case is open or closed, if overall eligibility passed or failed, and if income and assets passed or failed.

The **Income/Asset Test Skipped** field displays with a YES or NO, letting you know whether or not the income and asset limit test was skipped when running eligibility.

**Ask** What other valuable information do you see on the **W-2 Budget** page that could be helpful in problem-solving a case?

*Possible Responses: assistance group size, breakdown of unearned income, income broken down by individual*

### Telling CWW to Count Income and Assets Again

Getting CWW to count income and assets again when the allow CMF/+ placement to begin box is checked can be tricky. Although it is appropriate to check the box for CMF/+ placements to begin, we know that participant circumstances change, and sometimes we need to rerun eligibility with CWW counting income and assets. So, how do we double check that income and assets are being counted?

Let's navigate to the **Initiate Eligibility** page. Notice that the **Ignore W-2 income and assets test to allow CMF/+ Placements to begin box** still is checked. Also notice that no matter how many times we try to unclick the box, it just stays checked.

Remember, when we check the ignore income and assets box, we change how CWW determines eligibility. One of those changes is reflected on the **W-2 Placement** page. Let's take a look at the **W-2 Placement** page.

Checking the **Ignore W-2 income and assets test to allow CMF/+ Placements to begin** box enables the **Check for Non-CMF/+ Placement Eligibility** button on the **W-2 Placement** page. This button is enabled only when any of the current or future eligibility month(s) were overridden for CMF and CMF+ purposes.

When you want to tell CWW to start counting income and assets again, clicking this button does a few things:

- Disregards the current CMF or CMF+ placement,
- Causes CWW not to override the financial eligibility result (i.e., include income and assets in the eligibility determination), and
- Schedules the **Initiate Eligibility** page

Use this button whenever a participant is placed in CMF or CMF+, and you are considering a placement change. It helps you determine whether the case is financially eligible when CWW counts income and assets again instead of overriding them.

**Ask** What questions can we answer regarding eligibility?

- 👉 Non-Financial TN 6-10
- 👉 Assets TN 10-13
- 👉 Income TN 13-16
- 👉 W-2 Group TN 18-19
- 👉 Pending Cases TN 20
- 👉 Failure Codes TN 21

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## W-2 Group

Entering income and assets incorrectly isn't the only reason for inaccurate eligibility determinations. Sometimes we make mistakes telling CWW who is in the W-2 assistance group.

**Note to Trainer:** Click Eligibility → Run Results → AG Composition Details to navigate to the **Assistance Group Compositions Details** page.

For CWW to determine eligibility correctly, it must know how group members are related, who is living in the household, and when that person joined the household. All these things directly affect how CWW builds the assistance group. There are two easy ways we can check our assistance group for accuracy: the **Assistance Group Composition Details** page, and the **W-2 Budget** page. We'll look at both.

The **Assistance Group Composition Details** page summarizes the results for an Assistance Group as well as those for each person.

The first section of this page is the **Assistance Group Overview** section. Here you see the program CWW is building the assistance group for, as well as the benefit begin and end months. You see the eligibility status, along with reason codes for any failure. Clicking on the reason code opens a dialog box that gives you a description of why your case failed eligibility.

In the **Assistance Group Composition Details** section, CWW displays a listing of everyone on the case. Here you see if anyone listed on the case has been excluded from the W-2 assistance group, along with a reason why the person was excluded.

When you run eligibility for a case, ensure that the W-2 group composition is correct and as you expected it to be. If it is not, check the reason codes to determine why a household member may have been excluded from the W-2 assistance group.

The **W-2 Budget** page provides a wealth of information on your case when problem-solving cases in CWW. On the **W-2 Budget** page, you can view the detailed calculations CWW used to determine what income and assets are countable for the W-2

group. Checking the **W-2 Budget** page for accuracy helps ensure your entries in CWW are correct and you've determined eligibility appropriately.

On the **Assistance Group Overview** section, you see the Eligibility Begin Date, or the budget month, and the Determination Date.

The **Result** section provides an overview of the eligibility determination. It indicates if the case is open or closed, if overall eligibility passed or failed, and if income and assets passed or failed.

You also see the **Income/Asset Test Skipped** field. When this reads YES, it means that we checked the Ignore Income and Assets box on the **Initiate Eligibility** page. Whenever you expect a case to fail for income or assets, but it still is passing eligibility, the **W-2 Budget** page is a good place to check if the Income/Asset test was skipped while determining eligibility.

A little further down the page, you see what CWW counts for income and assets based on all the information you entered. This is a great place for you to reference the entries you made and check that everything looks correct.

Take a look at the Assistance Group Size in the **Gross Income Test** section. CWW counts four people in Harriet's case when determining her income limit. This is a great place to check our Assistance Group to see if we incorrectly coded a family member out of the home.

**Ask** When else would it be helpful to check the assistance group size?

*Possible Response: To check that you have correctly added a person to the case.*

-  Non-Financial TN 6-10
-  Assets TN 10-13
-  Income TN 13-16
-  Eligibility TN 16-18
-  Pending Cases TN 20
-  Failure Codes TN 21

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## Pending Cases

There are times when applicants or participants need to provide additional verifications and you expect the case to pend. However, when you believe you have entered all the verification items and the case still is pending, you need to do a little digging.

You have three go-to pages when this occurs: **Verification Checklist**, **Verification Due Dates**, and **Pending/Not Verified Info**. All of these pages are under Verification Details

in the **Navigation Menu**. Start at the **Pending/Not Verified Info** page. This page provides you with all the essential information, such as the verification causing the case to pend and the verification due date. It also has the handy feature of being able to click a checkbox and click Next to navigate directly to the page, and field, causing the case to pend. It even highlights the field in yellow for you, so you don't have to search for the hidden question mark.

Sometimes, it is tricky to figure out how to fix a pend, such as when the case is pending for W-2 Up-Front Activity Requirements. Who has seen this happen before? Give us a thumbs up reaction if you have, or a thumbs down reaction if you haven't.

**Note to Trainer:** If you get thumbs up reactions, ask learners to share how they fixed the pend. If you get thumbs down, read the information in purple.

Remember, the **W-2 Up-Front Activity Requirements** page should match the **Begin Month/Year** of the **W-2 Request Date**. CWW pends for W-2 Up-Front Activity Requirements when the **W-2 Request Date** is prior to the **Begin Month** on the **W-2 Up-Front Activity Requirements** page. For example, if Harriet requested W-2 on July 28, CWW would look for information beginning in July for her. However, if the **Begin Month** on the **W-2 Up-Front Activity Requirements** page was August, CWW pends the case because it cannot find Harriet's up-front information for July.

To get the case to pass, you delete the **W-2 Up-Front Activity Requirements** page using the AE – ERROR deletion reason. Then, enter a new page with the correct **Begin Month**.

**Ask** What questions do you have regarding pending cases?

-  Non-Financial TN 6-10
-  Assets TN 10-13
-  Income TN 13-16
-  Eligibility TN 16-18
-  W-2 Group TN 18-19

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## Failure Codes

So far, we've covered the basics of how CWW thinks, and looked at a few of the common problem-solving areas. Now, let's take a closer look at failure codes and how we can use those to help us problem-solve.

CWW always tells us the reason(s) why a case fails W-2 eligibility by providing a three-digit failure code. This code gives us insight into what CWW is thinking. Click on the failure code to review a reason code description. Then, use that description to help you decide how you might resolve the issue. Who has accessed these failure code

descriptions before? Give us a thumbs up reaction if you have, or a thumbs down reaction if you haven't.

**Ask** What common failure code descriptions have you seen? Unmute and shout it out.

Let's take a closer look at some of the common failure codes and what you need to update to ensure the family receives assistance. As we go through each code, use your reactions to give us a thumbs up if you know what we need to update, or a thumbs down if you are unsure.

**Note to Trainer:** Pull up each case in CWW and navigate to the **Confirm Eligibility** page. Click on the code to pull up the window and provide the full description. If learners give a thumbs up reaction, ask a learner to share what updates are needed. Provide additional information from the italics as needed to support what the learners shared. Show where the information needs to be updated in CWW as you provide the explanation.

### **CWW Decline 7104420771**

Our first failure code is 054 declined this type of aid. Do you know what we need to update to ensure the family receives assistance?

*This commonly occurs when the W-2 Request is changed to NO. If CWW allows, change the response back to YES. If CWW does not allow you to update the request, you must complete a new W-2 Request.*

### **CWW Verify 1104420813**

Up next, we have two codes: 112 did not verify answers, and 113 did not provide information. Do you know where to look to find what we need to update?

*These failure codes are related to verifications. You can quickly find what is causing these codes by navigating to the **Pending/Not Verified Information** page. Here you can see that NV – NOT VERIFIED was entered on the **Current Demographics** page. This is what caused the 112 failure code. You also can see that F – FAILED TO PROVIDE INFORMATION was entered on the **Asset Gatepost** page. This is what caused the 113 failure code. If this information is incorrect, update it with the correct Verification or response, and rerun eligibility.*

### **CWW Residency 3104421030**

We have two codes again: 238 PP does not reside in Wisconsin, and 239 PP does not intend to reside in Wisconsin. Do you know what we need to update?

*If you see either of these codes, it means the response for **Currently Resides in WI** or **Intent to Reside in WI** is NO for the primary person. If this is incorrect, navigate to the **Current Demographics** page, and update the responses to YES.*

### **CWW Eligiblechild 6104421067**

Our next code is 250 no eligible child in the home. Do you know what we need to update?

**Note to Trainer:** Click Query → Confirmed Assistance Group Summary to navigate to the **Confirmed Assistance Group Summary** page.

*This one is a little trickier because there are several fields that determine if a child is in the home. This specific failure code indicates that the response to one of the Wisconsin Residency fields is NO for the child. To find this information, navigate to the **Confirmed Assistance Group Summary** page and click the magnifying glass. This takes you to the **Confirmed Assistance Group Eligibility History** page. Click that magnifying glass to open a new window with additional information. If this information is incorrect, navigate to the **Current Demographics** page and update the response.*

### **CWW Living 7104421076**

How about 352 target is not in a qualifying living arrangement - do you know what we need to update?

*This is another tricky one. Like 250, this code displays because a child is not in the home. We get a clue of qualifying living arrangement. That tells us that we likely need an update for **Living Arrangement Type**. Head over to the **Current Demographics** page and review the **Living Arrangement Type** for the child. Remember, all members of the household must have 01-INDEPENDENT to be considered part of the W-2 group. If the child is in the household, update the response to this field.*

### **CWW Custody 9104421094**

Let's continue with our child-related failure codes by looking at 367 minor not under legal custody of PP or coparent. Do you know what we need to update?

*Our key words in this failure code are legal custody. That tells us we need to head over to the child's **Household Relationships** page. Even though the parent is listed as **Baby's mother**, we did not indicate that the parent had legal custody of **Baby**. If the parent has custody of the child, update the response to this field.*

That is the last failure code we have for you today. **Ask** What questions can we answer regarding failure codes? Unmute and let us know.

Remember, if you think the case should pass W-2 eligibility, do not confirm the case as failing. Instead, click on the failure reason code to help you figure out what you need to update. You may come across the same failure codes frequently, and automatically know what you need to update in order for the family to receive assistance. Other codes rarely come up and require a bit more problem-solving.

## Closure

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**Note to Trainer:** Turn on your webcam and ask learners to do the same. Put the link to the evaluation in the chat. **Remind** learners to complete the evaluation after leaving. Before we go, we'd like to hear from you. **Ask** What tool/strategy did you learn today that will be helpful for you as you navigate cases in CWW?

We covered a lot of information today on how to troubleshoot CWW and armed you with some tools to get CWW working for you. We hope that these strategies build your confidence in problem-solving any errors you encounter in CWW.

# Appendix

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## Appendix A – Harriet Case

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Prior to the webinar, create the following case in CWW Training Environment.

Harriet [last name], Female, 10/31/[36 years ago]

Other HH Members (C, BC for all)

- Liam [same last name], Male, 08/06/[33 years ago]
- Jordan [different last name], Female, 04/05/[10 years ago]
- Beau [same last name], Male, 09/01/[3 years ago]

No to all other requests, no housing subsidy

HH Relationships

- Harriet and Liam are married
- Liam is not related to Jordan, and is Beau's legal father
- Jordan and Beau are half siblings

Current Demo

- Harriet – DR for identity, Married, MA for WI Residency
- Liam – DR for identity, Married
- All 01 living arrangement type

School Enrollment

- Jordan completed 3<sup>rd</sup> grade, enrolled full-time (SR) and in good standing (AR)

Absent Parent

- Baxter [Jordan's last name], never married, legal parentage established

Assets

- Savings account
  - Owned by Harriet, \$10,000 **Self-Reported Amount** (BS)

Employment

- Create employment for Harriet with income information for the months of April, May, and June. Have \$0.00 in the **Override Converted Amount** field.
  - All other information can be random

Child Support

- Jordan receives \$250 a month (DE)

Eligibility

- Check box to ignore income and assets

Placement

- Enroll Harriet in WWP and place as a CMF

After placing the parent, change Jordan's Learnfare Status to ? and rerun eligibility. Keep clicking Next until you get to the **Confirm Eligibility** page.

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## Appendix B – Information for the Chat

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The producer should put the following information in the chat when asked by the trainer.

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### CWW Basics

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What do you do when CWW gives you a result you aren't expecting?

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### Thumbs Up/Down Information

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Click the Reactions button at the bottom of your screen. Type 'thumb' in the search field, then select the thumbs up or the thumbs down.

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### Non-Financial

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How many non-financial criteria are there for W-2?

What questions do you have about the non-financial criteria found in the **Case Information** section?

What else can you use to verify identity?

What questions do you have about the non-financial criteria found in the **Individual Demographics** section?

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### Assets

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Looking at our screen, what might be an inaccurate entry? Circle it.

What types of lump sums have you seen participants receive?

What impact does undercounting assets have on applicants and participants?

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### Income

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Harriet reports her employment is ending on March 5. She is paid bi-weekly and will receive her last check for \$514 on April 5. How would you build Harriet's employment pages in CWW to reflect her income accurately?

Are there any other questions about overrides?

What would we do if Harriet's employment suddenly ended, and she will no longer receive income for May and June?

In what field would we enter \$0.00 income for May and June?

What impact does miscalculating income have on applicants and participants?

**Eligibility**

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What other valuable information do you see on the **W-2 Budget** page that could be helpful in problem-solving a case?

What questions can we answer regarding eligibility?

**W-2 Group**

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When else would it be helpful to check the assistance group size?

**Pending Cases**

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What questions do you have regarding pending cases?

**Failure Codes**

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What common failure code descriptions have you seen?

What questions can we answer regarding failure codes?

**Closure**

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What tool/strategy did you learn today that will be helpful for you as you navigate cases in CWW?