Trainer's Notes

Managing Placements on the Web Redesign Project (MPOWR)

Purpose

The purpose of this course is to describe changes to placement policy and processes for W-2.

Learning Objectives:

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

- Describe CWW changes that support W-2 placement, two-parent households, Electronic Funds Transfer (EFT), Learnfare, at-risk pregnancy, hold benefits, and vendor payments.
- Correctly complete referrals for up-front and ongoing Work Programs participation (W-2, Minor Parent, and Learnfare).
- Describe policy changes and implement placement changes related to future dating and backdating placements.
- Accurately determine and confirm CMF eligibility using new CWW processes.
- Recognize two-parent participation requirements as displayed in CWW and apply appropriate federal two-parent household participation requirements.
- Correctly enter EFT payments for W-2 benefits on the CWW Liquid Assets page.
- Enter the future End Date for placement when W-2 Eligibility is ending.
- Correctly Hold Payments per W-2 policy.
- Identify additional changes to CWW Vendor Payments, Pregnancy, Assets, School Enrollment, and Up-Front Activities.

Materials

- Computer and projector
- MPOWR PowerPoint
- White board and dry erase markers
- Flip chart paper and markers
- Crayons/Markers on tables
- Evaluation

Suggested Pace

This course is a 3-hour course. The following agenda is the *suggested* pace.

Introduction .... 9.00 a.m.
Case Summary & W-2 Request .... 9:10 a.m.
Representatives/Vendor Gatepost, W-2 Vendor Payment .... 9:40 a.m.
School Enrollment, Pregnancy, Asset Gatepost, Liquid Assets .... 9:45 a.m.
Break.. 10:15 a.m.
W-2 Placements, Eligibility Improvements .... 10:30 a.m.
Confirmation and Post Confirmation Changes .... .11:15 a.m.
Referrals, Other Changes and Conclusion……………………………………11:45 a.m.

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Introduction

Give a brief introduction of trainers.

Review the purpose and objectives of the course. **Make** note that the screens shown during this session are mock ups. There may be small changes to final screens that will be in production in CWW as of June 26, 2016.

Address "housekeeping" issues (bathrooms, vending machines, breaks) and **state** that evaluations are on the tables and can be completed as we go through this session.

Ask the class to introduce themselves with the following information:

- Name
- Job Position
- Level of experience with CARES/Mainframe and CWW

Slide 1

State in an effort to streamline business processes, several CARES Mainframe processes are moving to CWW as of June 26, 2016. Today we will discuss changes to Eligibility, Payment, Referral, and Placement. First we will look at an overview of the system changes. Then we will review the changes to policy and systems in depth.

Slide 2

Pre-Eligibility screens: **Explain** what they were in CARES Mainframe and where the information will be located in CWW. Note that in this case, "Pre-eligibility" doesn't refer to the W-2 pre-eligibility processes/requirements; it refers to pages in CWW that are completed prior to eligibility determination.

Slide 3

Post-Eligibility screens: **Explain** what they were in CARES Mainframe and where the information will be located in CWW. This slide shows CWW pages that are completed after eligibility determination and confirmation.

Slide 4

Explain the CWW Driver Flow: the red boxes are new pages, and blue boxes are modified pages.

Note that some of the post confirmation pages will be scheduled only in certain situations. For example, if there is a two parent case, the Two Parent Participation page will be scheduled.

Discuss the flow of the training will not follow the driver flow shown in slide 4; however, when in the driver flow in CWW, the screens will appear as shown in slide 4.

Ask if there are any questions before moving forward.

Slide 5

Navigation Menu

State that the navigation menu now will include the work programs pages (bullet points on page 6 in the PG).

Application Entry

Slide 6

Case Summary

State the following fields have been added to the **Case Summary** page: W-2 Work Program Office, W-2 Placed Participant, and W-2 Placement.

Explain that the W-2 Work Program Office displays the work program office for the participant who is currently in a W-2 Placement. The existing Office field is renamed to Eligibility Office. The W-2 participant field is updated to W-2 Placed Participant.

Note The W-2 Work Program Office and W-2 Placed Participant will be blank if there is no participant currently placed. The Placement and Placed Participant information will not display if the case is confidential and the FEP is not authorized to access the case.

Discuss The W-2 Placement field displays the full placement title. **Refer** to the example in the PG.

Ask trainees if they know the full placement title for the bolded placements below:

Write answers on flip chart. Answers are in parentheses.

CSJ (Community Service Job)
W-2 T (W-2 Transition)
CMC (Custodial Parent of an Infant)
ARP (At Risk Pregnancy)
CMF (Case Management Follow up)
CMU (Case Management Underemployed)
CMD (Case Management Denied)
CMP (Case Management Pregnant Woman)
CMM (Case Management Minor Parent)
CMN (Case Management Non-Custodial Parent)
TMP (Custodial Parent TEMP)
TNP (Noncustodial Parent TEMP)
TSP (Stipends for Noncustodial Parents)

Debrief: Again discuss that the CWW **Case Summary** page will display the full name of the placement, so it's important for workers to know the full name of each placement.

Note: If trainees want more information on each placement, they can view that information in the W-2 Policy Manual in the following sections:
7.2.1 Unpaid Placements, 7.3.1 TEMP Participants, 7.5 Other Unpaid Placements and 10.1 Paid W-2 Employment Position.

Slide 7

W-2 Request

Discuss that there are some changes to this page, one being a minor change. The Subsidized Housing Effective Month will automatically populate with the Begin Month if the Enter New Begin Month field is entered on the **Case Summary** page.

State another change to this page is the W-2 Work Program Referral for Assessment section, which replaces AIJR. The dropdown will include the primary person and all individuals that are 18 years or older that have passed clearance. After a W-2 participant is referred, the Work Program (WP) status is added – C-CLOSED, E-ENROLLED, R-REFERRED, or S-SCHEDULED. Only one individual can be referred for assessment at a time from this page. If more than one individual needs to be referred for assessment, the FEP can refer one person, click next, and then navigate back to the **W-2 Reques**t page to refer the other individual.

Stress the importance of referring the second parent in a two parent household. FEPs should encourage participation with both parents. This could help with POP claims if the second parent obtains employment.

Inform the trainees the W-2 Work Program Referral for Assessment section must be completed prior to assigning upfront requirements. FEPs will receive a message that a referral has been made; then the FEP will be able to navigate to WPEN to complete enrollment and informal assessment.

Note: An informal assessment must be completed in CARES mainframe prior to determining up-front activities.

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Slide 8

Representatives/W-2 Vendor Gatepost

State that this page has been renamed, and now will ask if there are any vendor payments in the household. If the answer to the question, "Will your household have a W-2 vendor payment?" is Y- YES, then the **W-2 Vendor Payment** page is scheduled.

Remind trainees that this page is required to be completed for all W-2 cases at intake and review.

Slide 9

W-2 Vendor Payment

Discuss that this is a new page. It will collect vendor information that used to be on WPVP. **Note** that if a vendor payment already exists on WPVP, then the information will populate during conversion.

Review that on WPVP, up to three vendors could be entered, but now in the **W-2 Vendor Payment** page, only one vendor can be entered.

State that this page will require a vendor number. FEPs can either enter the vendor number or search the Vendor Find in order to locate the specific vendor number, Taxpayer Identification Number (TIN) or Social Security Number (SSN). If the FEP enters the vendor number directly, then vendor name, vendor type and vendor address will update when the page is saved by clicking "Next". In addition, the vendor information fields and the lookup tool will be protected when the page is saved.

Review in PG page 10 (under Changes - second and third bullets) how to add a Vendor if it is not listed in Vendor Find.

Make special reference to the note in this section regarding FEPs following their agency's internal process when submitting the completed DOA – 6448 form.

The **Vendor Amount** and **Vendor Reason** are required fields.

The Participant's Account Number with Vendor is required for Vendor Type UC-UTILITY CORPORATION or UN- UTILITY NON-CORPORATION.

Review note in the PG regarding conversion of vendor payment information.

Reference, if this comes up, that W-2 participants are able to allocate part of their benefit payment for a vendor payment and have the remainder sent as a check or electronically deposited in an account.

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Slide 10

School Enrollment

Explain that the **School Enrollment** page collects individual school enrollment information. The process of entering school enrollment information has been streamlined to include Learnfare monitoring.

Discuss the bullet points in the PG. Learnfare Status is required for children ages 6 through 17. Based on the Learnfare status, a Penalty Code may be required. Issuance Month is a read only field that indicates when benefits are issued for the participation period. The Participation Period field is a read only field that indicates the dates in which the information entered are applicable.

State a Learnfare status code WSP- SCHOOL RELATED PROBLEMS THAT IMPACT PARENTAL W-2 PARTICIPANT has been added to track children with school related problems that may impact a parent's participation in W-2.

Note the WNE – NOT ENROLLED Learnfare status code allows a penalty code to be entered. The Penalty Code and verification field are cleared when W-2 Review is completed. This is the only status code that will result in a financial penalty. FEPs should not enter a penalty code unless the participant fails to comply with Learnfare case management. Other Learnfare statuses do require Learnfare case management; however, they will not result in a financial penalty if the participant fails to cooperate. Compliance with the additional Learnfare status should be tracked in Work Programs.

Remind trainees that Learnfare policy is found in the W-2 Manual Chapter 16.

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Pregnancy

State the Pregnancy page is modified to collect At Risk Pregnancy information that previously was collected on WPHP. This section is accessible only when the W-2 Target Type is W-2 Pregnant Women (WWP), the current date is less than 30 days prior to the Third Trimester Begin Date, the worker is a FEP, and the individual is not in an open ARP placement.

Explain Third Trimester Begin Date is a new field, and is a read only field. This date will auto populate when the Pregnancy Due date field is updated.

Discuss the ARP Information section, which is used to determine ARP eligibility:
- Is this an at risk pregnancy and are you unable to work? Both must be true for the response to be Y- YES.
- Date determined to be at risk and unable to work by doctor. This is a required field when Y- YES is the answer to the first question.
- Remind FEPs that the DCF-F-4070-E At Risk Pregnancy form is not changing.

Explain a Y- YES must be entered for both the first and the second questions. This will generate a Y- YES response for the third question, Is participant potentially eligible for At Risk Pregnancy Placement?

Note to trainees that the date determined at risk and unable to work by a doctor cannot be more than 30 days prior to the W-2 participant's third trimester begin date, and cannot be a future date.

State that historical data from WPHP is not being converted, but can be accessed by querying WPHP.

Slide 11

Discuss WPHP is the old screen in CARES Mainframe. The two questions on this page (Is this an at risk pregnancy? and Are you unable to work due to this at risk pregnancy?) have been combined into one question on the **Pregnancy** page.

Review the call out boxes on the screen. The call out boxes will show where the information that was collect on WPHP and where it is collected in CWW.

Slide 12

Note that if FEPs have questions regarding the policy regarding ARP, they can review the W-2 Manual 7.4.6 At Risk Pregnancy section.

Discuss that the verification options are the same on the **Pregnancy** page as they were on WPHP.

Slide 13

Asset Gatepost

Explain a Prepaid Debit Card field has been added to the **Asset Gatepost** page.

Inform trainees that a Prepaid Debit Card will count toward the asset limit for W-2 eligibility.

Note a Y- YES value schedules the **Liquid Asset** page.

State that if trainees have questions regarding new Asset information to see Operations Memo 16-07.

Slide 14

Liquid Assets

Discuss an EFT information field has been added to the **Liquid Assets** page. Only one liquid asset may be used for W-2 EFT at a time (i.e., a participant may only deposit the entire payment into a single account; he or she cannot choose to put half a payment in checking account and the other half in a savings account). If an asset is selected to use for EFT, all other assets will default to N- NO. If a new asset needs to be selected to use for EFT, the current asset must be changed to N- NO.

State the character limit of the Account Number field on the Liquid Assets page has increased to 17 characters (from 10 characters).

Discuss if the W-2 participant wants his or her W-2 payment check electronically deposited into his or her bank account or prepaid debit card, the FEP must enter the account information in the W-2 EFT Information section. FEPs and FEP supervisors are the only staff who will be allowed to enter information into the EFT field.

Note that participants should be encouraged to take advantage of electronic deposit.

State financial institution name and account number must be entered for savings account, checking account, and prepaid debit card in the Financial Institution Name and Address Information section.

Review deleting assets in the PG.

Discuss that at pre-conversion a report is available and updated biweekly identifying all current EFT's on WPET that do not have a matching account type and/or account number on the Liquid Asset page. Most checking and savings accounts can be updated by matching the information on WPET to the information on the Liquid Asset page. Any EFT's that have matching information prior to 6/25 will be converted on 6/25 and the agency will not need to do anything additional to continue the EFT payments.

Prepaid Debit cards will not have the ability to align the WPET information with liquid assets in CWW until after 6/25/16 when prepaid debit is added to the asset page.

State that post 6/25: any remaining EFT's that did not convert will continue to be listed on a biweekly report and will need to have the information added to the asset page prior to 12/1/16. Any EFT payment that has not been converted will end beginning with the January benefit month.

If it comes up: The bank table is being eliminated, so there is no need for maintenance.

Slide 15

Questions

State that covers all of the changes to pages that are completed prior to eligibility determination. This project is titled "Managing Placements on the Web Redesign," so we will discuss that piece of the project next.

Before we do that, are there any questions on the material covered to this point?

Slide 16

Placements

W-2 Placement

State that this page allows placement of W-2 participants confirmed open for W-2 and replaces WPWW and WPFR. Note that the episode end reasons from screen WPFR have been updated.

Discuss the additions on this page in the PG regarding placements being entered on this page and reassigning a FEP ID if the FEP has changed.

Note the changes on this page. This is where FEPs can enter the Episode End Date and Work Program End Reasons. **State** that the reference table has been updated with work program reasons.

Review the new policy change that Employment Verification form is not required to change a placement. A FEP can accept verbal employment information from the participant. Stress that if a W-2 participant gains employment or loses employment, FEPs needs to enter the verbal employment information on the **Employment** page and pend for verification. After the employment verification is received, FEPs needs to go back and update the **Employment** page.

State there are auto closing placements. The placements and time frames for auto closing are on page 20 in the PG.

Note that the page is scheduled in the driver flow after confirming eligibility, but the FEP is not required to complete it at that time. He or she can bypass the page and come back to it later when the appropriate placement is determined.

Discuss the note section in the PG. If an individual is determined eligible for W-2, the W-2 agency should not withhold a placement.

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Slide 17

Discuss the FEP ID fields. The **Current FEP ID** will display as the FEP on the W-2 Up-Front Activities page. In order to reassign a FEP ID, the FEP needs to enter the new FEP ID in the **Reassign FEP ID** field on this page. After that is entered and the FEP clicks Next, the updated FEP ID will display on this page and on the W-2 Up-Front Activities page.

State that W-2 Placement page will load the most recent W-2 episode that has not be end dated or deleted. **Review** that only the W-2 Help Desk can delete a W-2 episode.

Review the best practice information, and remind FEPs that this is important for POP. As with WPWW, they would not end date a W-2 episode until the individual is no longer receiving W-2 and the case is closing.

Slide 18

Discuss the other bullets related to the **W-2 Episode** section. Give examples of circumstances in which a **Work Program End Reason** would not be required reasons, such as no longer meeting non-financial or financial, failure to verify, or anything that has to do with W-2 eligibility in CWW. Examples of when an **Episode End Date and Work Program Reason** are required include non-participation in employment search, failure to complete a mandatory EP review, or any reason related to WP participation.

Eligibility closures can end the episode up the last day that the W-2 eligibility is open.

Case Closure Flow

Explain the Case Closure Flow in PG. State that with eligibility closures, FEPs will need to update CWW with the updated eligibility information, run eligibility, confirm the closure, go to the **Placement** page, and enter the Episode End Date. **Remember** that no Episode End Reason is needed for eligibility related case closures.

Discuss if the case is closing for work program reasons, then the FEP should go to the **Placement** page, enter the Episode End Date and Episode Reason(s) (which ever reason(s) is appropriate should be entered), then run eligibility, and confirm the closure.

Remember that Work Program closures must have an Episode End Date and Episode Reason Code entered.

Explain the information in that if a case is closes for lack of review after Adverse Action (AA) and before the end of the month, the FEP can manually navigate to the W-2 Request page and change the request from a NO to YES and run the review.

If the case is closed the month after the review was due, the FEP must record a new group level program request then process the group level program request in order to complete the review.

Individual Placement Information

State that the Individual field on the **W-2 Placement** page will list all individuals who are eligible to be placed in a W-2 employment position. If the individual in the placement has moved out of the household or left the case, FEPs will receive a warning message to change the placed individual.

Explain that Placement options will include only those placement types for which a W-2 participant is eligible based on the W-2 Target Type (from the **W-2 Request** page). **Refer** to the Target Type and Placement chart in the PG.

Discuss changing placements or the placed W-2 participant is the same as it was on WPWW. Simply choose a different W-2 participant or placement as appropriate.

Explain that after the Individual, Placement, and Placement Begin Date have been entered, the FEP clicks the Add button to add the individual to the dynalist. The dynalist then becomes the historical record of all placements within this episode. Prior to saving the page, this information can be reset with the Reset button.

Slide 19

Explain the functionality of the Check for Non-CMF Eligibility button and why a FEP would want to use it (if an individual is placed in CMF and the FEP is considering a placement change [maybe due to loss of employment], he or she would use this button to determine whether the case is financially eligible when income and assets are counted and not overridden). **Essentially** if the box is enabled the FEP should click the box and if the box is disabled then the FEP would not have to click the box.

Discuss that there are other functions to this page:

- Displays EFT information for those in paid placement, if available.
- Requires placement end date when the eligibility is confirmed closed.

Explain that FEPs can add PIN level comments using the Add Work Programs PIN Comment button.

Inform trainees that they will not be able to view the PIN level comments in CWW. They will have to navigate to CMCC in CARES Mainframe to view the comments.

Slide 21

Future and Back Dating

Discuss that on the **W-2 Placement** page, FEPs will be able to future date and back date placements for a maximum of 10 calendar days from the current date.

State a batch process in CWW will run every night to change the placement on the begin date. **Discuss** if an error is received that the future placement did not take place, the FEP should review to ensure the correct placement was entered. After the FEP has determined the correct placement, he or she should update the placement and begin date.

Review the example for back dating a placement.

Explain that if a W-2 participant will no longer be eligible for W-2 due to an eligibility reason, a future Episode End Date can be entered up to the last day of the month eligibility is open. If closing due to WP reason the placement end date must be the current date.

State that if a W-2 participant is in a CMC placement, the FEP can enter a future placement and begin date for a maximum of 10 days prior to the 56th day or can enter an Episode End Date to the month eligibility ends. The system will automatically update the Placement Information set by the FEP. If no future information is entered, the system will automatically ends the CMC placement on the 56th day from the birth of the child.

Note if this comes up in training – if a W-2 participant in a CMC does not immediately return to employment on the 57th day then the W-2 agency could place W-2 participant in a CMJ placement. The example: A W-2 participant in a CMC placement was not returning to work until 2 weeks following the 56th day. The W-2 agency could place the W-2 participant in a CMJ placement for those 2 weeks until she returns to work.

Review that if a future placement was entered incorrectly, the FEP can click the Clear button to remove the incorrect future placement information. Corrected placement information can be entered if appropriate.

Future Dating Placement Scenarios

Review the Future Dating Placement Scenarios in the PG, pages 27-28. **Remind** FEPs that it is important to complete an informal assessment prior to determining the most appropriate future placement.

Scenario 1 is regarding future dating a CMC placement to a CSJ placement. Remind FEPs that an informal assessment must be completed prior to changing a placement. Also, FEPs would layer the EP and schedule the activity codes on WPCH. Comments should be entered to justify the placement determination.

Scenario 2 is regarding future dating a W-2 T placement to a CMF placement. Again FEPs should be reminded that an informal assessment must be completed prior to changing placement, EP should be layered, activity codes in scheduled phase and comments entered to justify the placement determination.

Note that in Scenario 3, Eligibility will need to be run twice to ensure non-financial and financial eligibility are met because the participant is moving from a non-paid placement to a paid placement. The FEP must complete an informal assessment ,update the EP, assign correct activity codes and enter comments regarding the placement determination.

Discuss that if a FEP is future dating a placement, a best practice is to stagger the W-2 participant's EP and ensure the activity codes on WPCH/WPCS match what is assigned on the EP.

Slide 22

W-2 Placement Summary

State that after entering a placement on the W-2 Placement page, the FEP can navigate to the **W-2 Placement Summary** page.

Inform trainees that this page will show the Episode, W-2 Episode Begin Date and W-2 Episode End Date, Individual, Placement and Placement Begin Date and Placement End Date.

Explain that if FEPs click on the clock icon, the W-2 Placement Episode Summary Detail will be shown. This will show all placement changes during a specific episode.

Eligibility Improvements

Slide 23

Initiate Eligibility

Discuss that CMF (Case Management Follow Up) cases should receive W-2 retention services for 12 months. In the past, eligibility would close when income and assets were over the W-2 limits, even though policy states that a W-2 participant remains eligible for W-2 retention services in a CMF placement. The workaround was to keep the Work Programs case open when eligibility was closed in CWW. This created many problems, such as not allowing a Review (which is required by policy), not allowing updates to the eligibility information and sending incorrect closure notices. Moving placements to CWW resolves those issues by allowing the eligibility to remain open.

State now that placements have moved to CWW, CMF cases will need to have eligibility run in a specific way in order to disregard income and assets during eligibility determination.

Note that all other (non-financial) eligibility requirements apply when an individual is in a CMF placement.

Review the Additional Notes in the PG.

- If the case is already passing for financial eligibility (income and assets) then clicking the "Ignore W-2 income and asset tests to allow CMF Placement to begin" box will not create an override because the case is already passing for income and assets.
- Stress that the override will apply only for the current month and future months of eligibility. If the FEP runs with prior dates (when they run with dates), the override will not apply.

Discuss the CMF Placement flow steps after employment has been entered.

1. Use the **Initiate Eligibility** page, select the "Ignore W-2 income and asset tests to all CMF placement to begin" box.
2. Run and confirm eligibility.
3. Continue through the driver flow to the **W-2 Budget** page. The W-2 participant will fail the income test, but will show the income/asset test was skipped if the income or asset limit has exceeded the WWC target type.
4. On the **W-2 Placement** page, change placement to CMF.

Slide 24

W-2 Budget

Discuss that this is a way for FEPs to check whether a W-2 Assistance Group's income and assets are not being budgeted for W-2 participants in CMF placements.

State that if income and assets are not being counted, then a Y- YES will display on the line Income/Asset Test Skipped. It will display as N- NO if the case passes the income and asset tests, even if the FEP had checked W-2 Ignore income and asset tests to allow CMF Placement to begin.

Confirmation and Post Confirmation Eligibility

Confirm Eligibility

Review that this page allows FEPs to confirm eligibility results. **Discuss** that when eligibility is confirmed, the **Work Programs Referral/Action** page will be scheduled if the following exist:

- A newly opened W-2 AG is confirmed, and/or
- A new potential Learnfare child is present in the W-2 AG that is confirmed and opened.
- A new EA is confirmed in the W-2 group.

Slide 25

Work Programs Referral/Action

State that this page allows referrals to Work Programs and Learnfare. **Explain** the criteria for individuals to be displayed on this page.

Go through the various Send Referral column statuses, noting that these statuses apply to both Work Programs and Learnfare. To simplify:

- FOR OFFICE [Office #] – This is a valid referral in the correct office and must be processed.
    - Note the transfer policy in Milwaukee.
- SENT FOR OFFICE [Office #] – The referral has already been sent, and it is a valid referral in the correct office.

- PENDING FOR OFFICE [Office #] – The referral has been sent, but the case is already in a different office. The other WP case needs to be closed so the valid referral can go through.
- Blank – The individual is correctly enrolled where he or she needs to be.

Explain The boxes in this section are protected, that the W-2 applicant or participant must be referred to Work Programs, and this page must be completed. When a W-2 applicant or participant is correctly enrolled in Work Programs, then this page will display as blank.

Review the various Action Needed column values in the PG.

Remind trainees of the Add PIN Level Comments button at the bottom of the page. Stress that FEPs will not be able to view the PIN Level Comments in CWW. They will have to navigate to CMCC in CARES Mainframe to view the PIN Level comments entered.

Reminder for Milwaukee agencies trainees should refer to the W-2 Manual 4.6.2 regarding transfers between agencies in Milwaukee County.

Transfer Scenarios

Discuss the two transfer scenarios. **Note** that if a case transfers between one Milwaukee agency and another Milwaukee agency, the FEP only needs to enter the updated office and FEP information on WPWI. If a case transfers from Milwaukee to BOS, then the case needs to close and re-open in the new office. The same applies to BOS contract area to BOS contract area transfers.

NOTE: Agencies will no longer be able to transfer CMF cases. If the case no longer resides in the agency's contract area, the case will close.

CWW Driver Flow – Next Pages

Discuss what will happen on the pages that will be scheduled in the driver flow based on actions taken on the **W-2 Placement** page.

Slide 26

W-2 Potential Payment Amounts

State this screen is replacing Mainframe screen WPPA, and shows W-2 potential payment amounts that are calculated but not yet issued.

Review new fields in the PG.

The screen will show the following:
- Participation Begin Date
- Participation End Date
- Estimated Pay Date
- Gross Pay Amount
- Prorated Pay Amount
- Placement

Slide 27

W-2 Two Parent Participation

State the **W-2 Two Parent Participation** page collects information for potential two-parent participation households.

Explain the **W-2 Two Parent Participation** page will be generated when the answer to the question Are Two Eligible Adult Parents With a Child in Common present in W-2 AG?" is Y- YES. The following fields also will need to be completed by the FEP if there is two-parent participation.

- Is a Parent a Disabled Adult For W-2? This will allow FEPs to indicate whether one of the Eligible Adults is considered to be disabled by W-2 definition.
- Is a Parent Caring For a Severely Disabled Child in The W-2 AG? This will allow FEPs to indicate whether one of the Eligible Adults is caring for a severely disabled child.

Note the fields Disabled Adult, Caretaker Parent, and Disabled Child allow the FEP to select which parent is disabled, the eligible adult who is caring for a severely disabled child, and the child in the W-2 AG that is disabled. **State** that the definition of disabled adult is in the W-2 Manual>Glossary.

Discuss the Results section, which contains read only fields, and displays whether the household is subject to two parent household participation requirements, whether Child Care is authorized, and the weekly required participation hours.

Slide 28

W-2 Hold Payments

State the **Hold Payments** page is completed at the request of the participant. A comment **must** be entered by the FEP regarding why there is a hold on the benefit. A letter will be triggered to notify the participant when benefits are held or no longer held.

Emphasize that the practice of holding payments in order to get a W-2 participant to contact his or her FEP is not appropriate. The letter will be triggered and will notify the W-2 participant that he or she requested the hold.

Review that if a W-2 participant is using EFT for his or her benefit payment, then the **W-2 Hold Payments** page cannot be entered.

Other Changes

Household Members

State a new functionality has been added to the **Household Members** page. A case member cannot be deleted if he or she is the owner of an asset designated as being used for EFT. FEPs can 15- OUT OF HOME this assistance group member on the **Current Demographics** page.

Slide 29

Application/Review Interview Details

Discuss that if a W-2 participant in a CMF or CMU placement is unable to attend his or her six month eligibility or EP review in person due to their work schedule, the FEP is able to conduct the six month review via telephone. Telephone reviews are only allowed for these two placements.

Inform trainees that the FEP is meeting with a W-2 participant prior to his or her six month review the FEP can complete the review at that time.

CWW Generated Notices

Review that notices have been updated to reflect new information. **Note:** All notices will be available to be viewed in in Access through the paperless option.

Discuss the notices that will be sent to W-2 participants such as Learnfare, Liquid Assets, and Hold Payments.

State AELR will now include the potential payment information for initial paid placements and it will also include how the W-2 payment will be received. The EFT begin and Vendor begin notices will be suppressed by the system if they occur on the same day as a new placement since it will be in the AELR notice of new placement

Case Summary.pdf

Inform trainees that the **Case Summary** page on which W-2 applicants or participants verify that the information they provided is accurate now will include the W-2 participant's placement.

Slide 30

Question

Ask the class if there are any questions on the material covered before concluding the class.

Conclusion

State the key points to remember regarding the changes to CWW. All of these points are reinforcement for what has been covered in the training.

Inform trainees that there will be a document on the Help Desk website which will be updated daily (especially during the first week) to include questions that have come in and the answers. **Stress** that trainees look there first if they have a question.

Stress that they should follow their agency's process if there are technical questions or policy and procedure related questions. The contact information is located in the PG.

Remind the trainees to complete the evaluation.