Purpose
The purpose of this course is to develop a clear understanding of specific CWW processes, accurately use CWW in W-2 eligibility determination and placement, develop a clear understanding of the CWW Employment page, and correctly enter employment.

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

- Complete a W-2 Request for Assistance using the correct process for the unique circumstances of each type of application.
- Accurately verify and track Social Security Number applications.
- Complete the Absent Parent page with accurate information to assist with Child Support collections.
- Explain how the CWW Employment page is used in a variety of circumstances and correctly enter information on this page based on those circumstances
  - pay frequency
  - $0 income, ending the employment sequence, “layering”, and multiple rates of pay for a single job.
- Describe the process CWW uses to determine eligibility.
- Describe CWW logic, including Begin Month/End Month and prospective eligibility determination.
- Describe W-2 Placement processes, including episodes, future dating, and CMF logic.
Materials

- Practical Applications in CAWW: Participant Guide
- Practical Applications in CWW: Trainer’s Notes
- Practical Applications in CWW: PPT
- Projector
- Flipchart or whiteboard and markers
- CPS Unit
- Evaluations

Trainee Materials
- Practical Applications in CWW: Participant Guide

Course Outline

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Introductions

Introduce yourself. Ask the trainees to introduce themselves by stating their name, job function, agency, and one area in CWW that they may struggle with, not understand, or need more direction on. Write these areas on a flipchart.

After introductions, review the list, noting those areas that will be covered in the course. If there is time at the end of the course, trainers can discuss some of the others and/or refer trainees to resources for more information.

Course Overview

Give a brief overview of the course and go through the objectives.

- New W-2 Requests
- Trouble Spots
- W-2 Placement
- Adverse Action and CWW Logic

Stress that there are references throughout the course to many more resources that include additional Process Help, Desk Aids, and Policy.

Emphasize the importance of using Process Help and Desk Aids throughout the day. Process Help in CWW is very helpful in defining processes and how pages should be entered accurately.

Note that new Desk Aids are announced in the Training Times.

Trainer Note - Almost every screen print/graphic that is in the PG is in the PPT. A green arrow is the cue to change slides in the PPT.
CPS Review

Use the short CPS review as an opening to start trainees thinking about how CWW works and “thinks”. It’s not a quiz, but more of an interactive activity meant for discussion. The questions are also listed in the PG so trainees may take notes.

**Summary pages are useful to:**
A. Review the information entered for accuracy
B. Allow workers to access further details
C. Provide an overview of the case
D. **All of the above**

Summary pages are available for each section of information entered in CWW. When reviewing a case, they are a great place to start collecting information about the family’s circumstances.

**Which of these is NOT a Summary page?**
A. Case Summary
B. Case Information Summary
C. Individual Demographics Summary
D. **Participant Summary**
E. Benefits Received/School Enrollment Summary
F. Individual Non-Financial Summary
G. Asset Summary
H. Employment Summary
I. Unearned Income Summary
J. W-2 Placement Summary

You can see the types of summary pages that are included. However, there is no Participant Summary, as some of the other summaries, such as Case Information and Individual Demographics, do summarize information related to a specific participant.

**Gatepost pages are used to:**
A. Access a new set of CWW information (e.g., asset and eligibility results).
B. Access other systems to gather more information.
C. **Collect information to determine whether additional details are needed.**
D. All of the above.

Although CWW will access other systems through data matches, the Gatepost pages are not necessarily the trigger. Gatepost pages are used to schedule pages in the driver flow in which more information is needed.

**Which of these is NOT a Gatepost page?**
A. Representatives/W-2 Vendor
B. Other Healthcare Programs
C. Assets
D. **W-2 Information**
E. Expenses
F. Medical
G. Employment
H. Tax Deductions
I. Unearned Income

Some of these are used only for income Maintenance, but you will also see them in the driver flow. W-2 Information is not a Gatepost page because many of the pages are shared between IM and W-2. In those cases, W-2 workers only have access to those fields that are relevant to W-2.
Prior to Eligibility Determination, the W-2 worker must print an Application Summary to allow the W-2 applicant and/or participant to review the information entered in CWW for accuracy.

A. True  
B. False

True, the W-2 applicant or participant must have the opportunity to ensure the information is accurate prior to running eligibility. Errors could cause eligibility to pass or fail incorrectly. Entry errors are common and easy to make.

More information on CWW processes can be found in:

A. Learning Center  
B. CWW Process Help  
C. Operations Memos  
D. All of the above

Learning Center – A resource for training courses and Desk Aids.  
Process Help – Great resource for instructions on how to enter/process CWW pages.  
Operations Memos – processes and things you need to know. Be sure you are on the list for new Operations Memo announcements.

CWW collects information in the following order:

A. Non-financial information, Financial Information, Individual information and program requests, Eligibility, and W-2 Placement.  
B. Individual information and program requests, Non-financial information, Financial Information, W-2 Placement, and Eligibility.  
C. Individual information and program requests, Non-financial information, Financial information, Eligibility, and W-2 Placement.

CWW collects individual information first, because many of the non-financial requirements are related to individuals (SSN, citizenship, reside in WI, etc.) and failure to meet any of them will fail eligibility. All of the other information collected may impact eligibility determination. When running eligibility, CWW uses all the information collected to make a determination. W-2 Placement is last because there must be an eligible adult in order to make a placement.
CWW Processing

**Note** that all W-2 requests must be processed by creating an RFA for all W-2 applicants.

**Activity**

Using the list in the TN Appendix cut the steps into strips and give trainees 5 minutes to put them in order. This may be used as an opening activity to see what they know, or at the end of this section to review. Note the steps are in the correct order in the TN Appendix.

Refer to the Request for Assistance (RFA)/Case Processes Desk Aid and W-2 Eligibility Review in CARES Worker Web (CWW) Desk Aid.

**Adding a W-2 Program Request**

Remind trainees when processing an RFA for any W-2 applicant they must create a new RFA by going to the Client Registration tab on the Navigation Menu.
Go through how to enter a new RFA on the Basic Information page. State that the W-2 worker needs to enter the W-2 applicant’s information on this page and can create a New RFA from this page by selecting the button.

Discuss the Potential Individual Matches page and that W-2 workers must always select the last radio button to create a new RFA for the basic information entered, even if there is a match. If a warning message displays, select the radio button again, and click Next.
Review the Additional Data page and remind W-2 workers that all fields with an asterisk must be completed.
Remind trainees that W-2 workers only select the program request for W-2 on the Program Request page.

Discuss that the Application Registration must be printed and the W-2 applicant must sign it.
State that to complete the RFA, the Registration Filing Date and the W-2 Program Filing Date on the Complete Request for Assistance page must be entered. Emphasize that the two dates must be the same. Discuss that the RFA Summary page is the last page in the driver flow and that this is the page where FEPs start from when initiating the intake interview.

Read the reminder on this page regarding entering RFA Comments.
Processing a W-2 Program Request

Review that trainees should reference the Request for Assistance (RFA)/Case Processes for W-2 Desk Aid. This will walk them through step by step on how to complete the application process by selecting the Begin Intake Interview for when an applicant shows for the intake interview or to the Complete Request for Assistance page to withdraw the request when the applicant does not show for the intake interview.

Emphasize the Begin Month and which month to use.

Discuss the correct way to enter the Begin Month in these situations:
- Intake - the month of the request.

State that in the next section we will discuss the proper use of dates for ongoing cases.
Trouble Spots

Introduction

Note that although we will not be going through the whole driver flow in CWW, we will be looking at a number of areas where workers typically have some issues.

These include:

- Correct begin months
- Obtaining SSNs,
- Entering employment information and dealing with some processes that are “beyond the norm”,
- Entering addresses accurately and according to USPS standards,
- The Absent Parent page

Proper use of Dates

**Explain** when entering the Begin Month for ongoing cases, the date is the first month the income or expense listed on the page appears in the eligibility budget. The begin month is also the first month CWW uses the non-financial information when determining eligibility. That information continues to be counted until an end month is entered or a new begin month with new information is entered for that sequence.
Social Security Numbers

Household Members

Remember that for W-2, the date of birth must be verified (once).

Discuss the SSN requirements. All W-2 applicants and participants must provide an SSN or proof that they have applied for one for all members of the W-2 Group. No exceptions.

Go through the process for entering the C-COMPLETED REQUIREMENTS and that a Data Exchange will verify it. If there is any discrepancy, the DX will provide that information and the worker can re-verify with the applicant.

A verbal report of the SSN is acceptable; a Social Security Card is not necessary because of the DX verification.
Discuss the process for newborns and others who do not have an SSN and the importance of following up on getting the SSN if it has been applied for. Remind FEPs they must use the tracking on the Permanent Demographics page.

Review the specifics on the process for qualified non-citizens without an SSN.

Discuss the purpose of the Override fields.
**Permanent Demographics**

**Emphasize** the tracking for SSN application. If an SSN was applied for, the applicant was given a receipt that should be used for verification. If no SSN was entered on the **Household Members** page, then the **SSN Application Date** and **Verification** fields are required.

**Activity: 2 Minute Pair Share**
Stand up, turn to your neighbor, and in 1-2 sentences state either something new you learned about entering and verifying SSNs or the most important thing you can think of about accurately entering and verifying SSNs. Sit down when you’re finished.

**Transition**

Any questions on the SSN information? Remember that everyone applying for W-2 must provide an SSN or verification that he or she has applied for one. There are no exceptions.

The next area is Employment, which might look easy but entering employment accurately is one of the more error-prone areas, both for FEPs and IM workers. We will be spending a lot of time on this and looking at lots of different examples.
Employment Information

**Note** that we will go through entering a standard employment sequence, and then discuss some of the other types of employment functions ($0 income, multiple pay types, ending employment).

**Remind the class** that only current employment needs to be entered. If it is past employment, then it should not be entered here (they will collect that in Work Programs to get a work history).

**Refer** to Employment Process Help, which describes these processes step by step.

**Employment**

**Note** the progress bar has little rectangles for each sequence, and they are gray when they are completed. If there were additional entries to make, the progress bar would show the progress in white.

**Effective Period**

**Remind** trainees that the **Begin Month** is the first month that CWW will use the information in the eligibility determination. It will continue to consider the information entered on this page until an **End Month** is entered. The **Begin Month** is the month in which the change in income occurs. **Go through** the examples.

**Activity: Whole Group Questions** – **Ask** trainees for responses.
- Kim starts a job August 27, but will receive the first paycheck in September. What is the **Begin Month**? **September**
- Maya is off work for maternity leave and plans to return to work September 17. Her first paycheck after her return is in October. What is the **Begin Month**? **October**
- Rory reports he got a raise as of August 15, and it will be on his August 30 paycheck. What is the **Begin Month** for the change? **August**
**Employer Information**

**Encourage** trainees to enter as much information as is available and to use the FEIN lookup tool.

**Employment Description**

All available information should be entered in the description section.

**Strike Information**

**Strike** information is used in non-financial eligibility for W-2. If a parent in the household is on strike the last day of the month, then the group is ineligible for W-2.
**Detailed Wage Information**

This is the section that really needs to be entered accurately in order to determine the correct income.

**Refer** to the “Prospective Budgeting” courses and **emphasize** the importance of knowing how to accurately prospective budget so they can get the employment information correct. Workers will need to manually calculate and override each time there is a change in income, which includes starting and ending employment, to account for partial months’ pay.

**Discuss** the **Pay Frequency** field.
Discuss how to calculate the hours per pay period; emphasizing it is pay period and not week.

Trainer Note - This is a common error because FEPs are accustomed to using “hours per week” and talking in those terms. This is per pay period and may be different.

Note that although it may seem that the hours should be multiplied by 2.15 for bi-weekly or 4.3 for weekly, CWW takes the prospective budgeting calculation into account when calculating and populating the Monthly Converted Amount for weekly and bi-weekly pay schedules. It does not for semi-monthly (CWW multiplies by 2) and monthly (CWW multiplies by 1) pay, so the hours need to be multiplied by 2.15 or 4.3 to account for the discrepancy.

For semi-monthly and monthly, when at least 30 days of actual pay stubs are received, then re-calculate and use the average hours in the Average Hours Per Pay Period and CWW will then calculate it correctly.

Discuss the function of the Add button and Edit button.
Add – adds the employment to the dynalist as it was entered. It determines the amount per pay period based on hours and pay.
Edit – allows updates to the wage information.

Note that the BC+ Pre-Tax Deductions section is only used for BC+.

Discuss the function of the Calculate button.
Calculate – completes the Totals and Comments section, calculating the monthly income for MA and for other programs. It converts the information from the dynalist to a monthly amount.

Note that the Totals and Comments will be covered more later. Right now, we are only looking at a standard employment with regular wage types.

Note that the Monthly MA Amount may be different from Monthly Converted Amount because MA uses a different multiplier. FEPs are concerned with the Monthly Converted Amount.

The Monthly Converted Amount is the monthly amounts that CWW will use to budget the income in W-2 eligibility determination.
Emphasize the necessity of good comments that detail how income was calculated.

Note that the Comments example is very specific. Workers are encouraged to enter calculations. However, if it is a standard calculation like this one and it is obvious on the CWW page how the income was calculated, these details may not be necessary.

Emphasize that they are necessary if there are any overrides or manual calculations made by the worker.

**Family Major Medical Insurance Access for BadgerCare Plus**

FEPs only need to enter the **Begin Month** (same as the employment Begin Month) and then click the Verify button. Do nothing else in this section. IM will review it for accuracy.
In Practice – How is it entered in CWW?

That was a simple example of the fields and what needs to be entered in them. Now let’s look at how a new employment sequence is actually entered in CWW.

The scenario walks through entering a new employment sequence. Keep in mind the **Begin Month** is the month in which the first paycheck is received. This month is generally prorated to budget real income because people typically get fewer paychecks in the first month of employment than in subsequent months.

**Ask** someone to read the scenario.

**Go through** the steps for entering the new employment and pending verification so an EVF is sent to the employer.
Enter the Detailed Wage Information and allow CWW to calculate the full month's income. This will be changed later when the EVF is received that verifies the number of paychecks in August.

Note the green line delineates the two sections necessary for FEPs. The BC+ Pre-Tax Deductions section is omitted in the example.

Enter Comments noting the actions taken.
Review the EVF.

If asked – the Regular Scheduled Work Hours is for the actual schedule and is used for child care.
First go back and verify the Employment Begin Date.
Edit the dynalist and enter the **Verification** for the **Average Hours per Pay Period**. Then calculate the August income based on Kim receiving only one paycheck in August. This will be entered in the **Override Converted Amount** field so that only this amount is budgeted for August.

Then create a new page for September using the **Enter New Begin Month** field and click Go.
Note the Event Panel.

Note the Begin Month is now September, and explain the message at the top of the page (informational only - there is no information available for September, so CWW displays the most recent information it has).

Remove the Override Converted Amount and Verification and update the Comment to reflect the changes. Note that this is the amount that will be budgeted until either a new Begin Month is entered for a change or the employment is terminated and an End Month is entered.

Note that the FEP could have created both months (August and September) initially. Then when the EVF was received they would both be updated. However, that would require more updating. This way is fewer steps and gets the employment in the system while it is being verified. Good Comments noted that when the EVF was received, the August income would be prorated accurately.
**Activity: Employment Page – General Instructions**

Refer to the PG and introduce the activity. Trainees are provided with materials that present employment scenarios and blank screen prints (note the blank screen prints have a black line where there is a section not shown from the Employment page. Give them instructions to write in what they would actually be entering in CWW. Also have them note the steps they would take (e.g., new sequence, new begin month, click the Add button, click the Calculate button, etc.).

Provide this additional information.

- Taylor (green) – the intent is to read the check stubs accurately and calculate the income. They are to work independently or in small groups of 2-3 to write in their responses.
- LaToya (blue) – read the EVF and enter the income correctly. They are to work independently or in small groups of 2-3 to write in their responses.
- Tonya (yellow) – think through the steps to enter the $0 income while Tonya is off work due to injury. This leave is unpaid. List those steps. This is a group discussion.
- Greta (orange) – Enter the different wage type information from the EVF. They are to work independently or in small groups of 2-3 to write in their responses.
- Marisol (pink) – her income fluctuates so it is first verified with an EVF, then changes and another EVF needs to be sent, then she provides check stubs with actual income that needs to be budgeted. They are to work independently or in small groups of 2-3 to write in their responses.

When they are done, discuss each example and how it should have been calculated. Screen prints in the PPT. Each scenario is a different color slide background to make it easier for the trainer.

**Activity: Employment Page – Taylor (1)**

On June 1, Taylor is applying for a JAL to have his car fixed. He is paid every 2 weeks, or bi-weekly. He has provided his last 3 check stubs for verification. The FEIN is 39-5492142. Taylor had an increase in hours and pay last month. **Review his check stubs and enter the employment information.**
**Activity Answer: Taylor (Green)**

**Goals** – Accurately read check stubs to enter the **Employment** page. Be aware that only the last 30 days of check stubs are required, so the 1st check can be disregarded.

Enter the information from the check stubs. Because he is paid bi-weekly, the information can be entered directly from his check stubs with a bi-weekly pay frequency. He got a raise in rate and hours after the first check. The first one is not used because there are 30 days available with the new pay rate on it.

**Note** that this is ongoing employment and Taylor’s application date is June 1, so no prorating is required.

1. Enter the **Begin Month** of June.
2. Enter the **Employer Information** and **Employment Description**.

3. **Pay Frequency** is bi-weekly, **Average Hours Per Pay Period** is 71, and **Hourly Rate** is 9.00.
4. Add.
5. Calculate.
6. Enter **Comments** on how the income was determined.
7. Enter **Case Comments** noting the changes to the **Employment** page.

The amount budgeted should be $1373.85 (in the **Monthly Converted Amount**).

- (hourly rate) x (average hours biweekly) x (2.15 weeks per month)

**Emphasize** the need to enter **Comments** with the calculations and how you arrived at the information to enter. A comment also needs to be in **Case Comments** noting the change.

**Note** that if it is added and you notice it is incorrect, edit or delete it to correct it.
Activity: Employment Page – Latoya (2)
Latoya reported that she started a new job on 5/27/13 and reported it on June 3. The EVF was received June 6 from the employer. Enter the employment information from the EVF below.
**Activity Answer: Latoya (Blue)**

**Goal** – Accurately enter the information from an EVF.

Enter a **Begin Month** of June.

**Enter** all the basic information from the EVF.

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**June**

1. LaToya works 25-30 hours per week at $8.75 per hour.
2. She is paid semi-monthly.
3. Determine her average hours per week \((25+30=55/2=27.5)\) and multiply by 2.15.
4. Enter her **Pay Frequency, Rate Per Hour, Wage Type, Average Hours Per Pay Period** (59.13), and **Verification**.
5. Click the Add button and the Calculate button. **Totals and Comments** are calculated using the Calculate button using 2 as the multiplier for semi-monthly.
6. Manually determine LaToya’s average income for June (she is getting only one paycheck).
   a. Average hours per week=27.5
   b. 27.5x$8.75x2.15=$517.39
7. **Comments** are entered to explain how the income was calculated.
8. **Case Comments** are entered to note the change to the **Employment** page.

**Note** that this is a new job, so it is a new employment sequence.

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**July**

9. **Enter New Begin Month** of July and click Go.
10. The **Detailed Wage Information** can remain the same. Because LaToya will be getting two paychecks in July, the **Override Converted Amount** is removed.
11. Enter **Comments** to explain the change.

After actual pay stubs are received (either at Review or as a result of a POP request), then re-calculate the **Average Hours Per Pay Period** and enter the ongoing average income and update as needed.
$0 Income

$0 income is entered when an W-2 applicant or participant is maintaining employment, but will have $0 income for a period of time.

Go through the steps to enter $0 income in future months.

Point out the location of the Enter New Begin Month bar, and explain the importance of using this to enter new data rather than changing the Begin Month at the top of the page. The Begin Month at the top of the page is really only used for a new employment sequence. Otherwise use the Enter New Begin Month bar.

In Practice – How is it entered in CWW?

Go through the steps to actually enter the $0 income.
When entering future data, the message that only previous data is available will display. **Explain** why this happens – the worker is attempting to enter future data that is not available, so the past data displays.

**Note** that the **Begin Date** is displaying as June so the worker can now enter information for June (a future month).

**Note** that nothing changes in the **Detail Wage Information** section.
First determine the partial pay she will receive in June for work done in May. Override the converted amount. CWW will now use this amount to budget the income and determine eligibility for June.

Remind trainees to always enter comments.
July needs to be entered as the $0 income month.

**Note** that when the individual returns to work, it will also need to be verified with the first paycheck after she returns. Then it will be entered for the partial month followed by the full month, similar to new employment.

Review the **Employment Summary** and detailed history of this employment sequence to check the accuracy.
Activity: Employment Page – Tonya (3)
Tonya is employed 20 hours per week at Piggly Wiggly making $8.50 per hour and has been since mid-April. She has reported on May 22 that she injured herself at work on May 18, and this has been verified with the employer. Tonya worked 42 hours May 1-18 and her last paycheck is June 1. Tonya provided a doctor’s statement that she may return to work in 8 weeks, which will be July 15. This is unpaid leave. The original employment data is shown on the screen print on the next page. What steps will you take to update the information?

Activity Answer: Tonya (Yellow)
Trainees were given Tonya’s original employment page with a Begin Month of April, when she started the job. Three months need to be entered: June, July, August.

Goal – Define the steps needed to accurately enter changes in income over a period of time. It’s important for workers to think through the process before making the entries. That way, all the steps can be captured and all the income that needs to be adjusted is entered.

Group discussion to determine the steps in this process. Ask the group leading questions to fill in the process while displaying the PPT slides that illustrate it.

Example questions as you go through each step:
• What’s the Begin Month?
• What’s the next step?
• What needs to be changed?
• How do we determine the income to be budgeted?

Note there are no green arrow graphics for Tonya’s PPT. Each numbered item is a new slide in the PPT (slides 37-46)
1. The first 2 Yellow Slides show the original data for April. (click through 2 slides; slides 37-38)

{Answers on next page}
June
2. Enter 06 2013 in the Enter New Begin Month and click the Go button. This creates a new month for CWW to look at the date without creating a new employment sequence (you want a new sequence only when it is a new job).
3. The Event Panel displays a message that April data is displayed with the Begin Month of June. Everything else remains the same in these two sections. The FEP knows now that the page is ready for new entries.
4. Don’t change anything in the Pay Frequency or Detailed Wage Information sections. Leave this so the regular information remains available. The changes will be in the Totals and Comments section.
5. Calculate Tonya’s income for May (42 hours x $8.50 per hour = $357.00), received in June, and enter that in the Override Converted Amount field. Enter the Verification. Enter new Comments to explain the change. Enter Case Comments noting the changes to the Employment page.
6. Enter the new Begin Month for Family Major Medical Information Access for BadgerCare Plus. The system may also require you to Verify again.

July
7. Enter 07 2013 in the Enter New Begin Month and click the Go button.
8. Everything but the Begin Month remains the same in these two sections.
9. Enter the Override Converted Amount as $0 and the Verification. Enter Comments to explain the change. Enter Case Comments noting the changes to the Employment page. Again, you will need to change the Family Major Medical Information Access for BadgerCare Plus to match the new begin month and potentially Verify again.

August
August should not be entered yet because it needs to be verified that she actually is returning to work prior to entry.

Note that if she goes back to work sooner or later than reported, she will need to notify her FEP, and July will need to be updated. August also needs to be updated because she will be back to regular hours and pay, and the override amount needs to be removed.
Multiple Rates of Pay

Up to 4 different types/rates of pay can be entered. Simply enter each type and add to the dynalist separately. Then Calculate to populate the **Totals and Comments** section.

This example is a nurse/home health care provider. Another common example is a waitress or bartender who has base pay + tips.
Activity: Employment Page – Greta (4)
Greta reported that she started a new job on 6/3/13. This EVF has been received from the employer. She will receive 2 weeks of pay in June. Enter the employment information.

Activity Answer: Greta (Orange)
Goal – Enter multiple types of pay rates.

Note this is a new job for Greta, so it is a new employment sequence.

1. Enter the Begin Month of 06 2013.
2. Enter the Employer Information and Employment Description.

3. Enter the Pay Frequency of W-Weekly.
4. Enter the regular pay first of 24 hours per week at $10.00 per hour.
5. Add.
6. Enter the shift premium of 16 hours per week at $10.75 per hour.
7. Add.
8. Calculate.
9. Determine the amount of pay for June that Greta will receive on her 1st and 2nd checks.
   a. 24 hrs/wk x $10/hr = $240.00
   b. 16 hrs/wk x $10.75/hr = $172.00
   c. $240 + $172 = $412 x 2 = $824.00
10. Enter the Override Converted Amount of $824.00.
11. Enter the Comments and Case Comments noting the change to the Employment page.
12. Enter 06 2013 as the Begin Month for the Family Major Medical Insurance Access for BadgerCare Plus.

10. Enter New Begin Month for July.

11. Remove the override and update the Comment.
Updating Employment Information

**Compare** updating employment and ending employment to the processes already covered.
- The partial month will need to be entered before the update is done.
- The ? will always be used to pend and generate an EVF.

**Always** use **Enter New Begin Month** when making a change (increase in hours or pay) at the same job. The month the change takes place is the month income is affected. Again, partial months may need to be entered to adjust the income correctly.

**Activity: Employment Page – Marisol (5)**
Marisol started working part time at Kathy’s Café. According to the EVF, she is working 15-20 hours per at $2.50 per hour plus tips of about $75-$100 per week. She is paid weekly. **Review the Employment page that has this initial employment entered.**

**Show** the first 2 Pink slides that are Marisol's original employment.

**Activity Answer: Marisol (Pink)**

**June**

**Read through this change.** Marisol calls on June 5 and reports that starting June 10 she is going to be working 25-30 hours per week because another waitress just quit.

**How will you update and verify this employment change?**

**Note** that it's important for FEPs to think through the process before making the entries. That way they can capture all the steps and all the income that needs to be adjusted.

**Go through** these steps.

1. **Edit June 2013**
2. Click on the Edit icon for the wages and update the hours. Change the **Verification** to ?-NOT YET VERIFIED. Click Add.
3. **Click on the “edit” icon for the tips and update the Total Amount Per Pay Period.** Change the **Verification** to ?-NOT YET VERIFIED. Click Add.
4. Click Calculate.
5. CWW will send out a new EVF to the participant.
6. **When the EVF is received, update the Verification** and any other changes as a result of the employer report.

The entries as listed above are shown.
Note the new calculations to be used in June 2013. Because this is Marisol’s report of a change, it is not yet verified. When the worker enters ?-NOT YET VERIFIED, a new EVF will be sent to get the verification so the case will pend until the EVF is received. When the worker receives the EVF, then verify that Marisol’s reported change matches what the employer reported on the EVF and adjust as needed.

When the EVF is received, income will need to be re-calculated to account for the change in hours.

1. Calculate the new income and enter the override.
   a. 2 weeks with 17.5 hour/wk average=35 hours. 35x$2.50=$87.50.
   b. 2 weeks with 27.5 hrs/wk average=55 hours. 55x$2.50=$137.50.
   c. $87.50+$175.00+$137.50+$275.00=$675.00. This is the override for June.

2. Enter New Begin Month for July to remove the override.

3. Remove the override.
After 31 days of employment, you request check stubs from Marisol to verify her hours and income for the Job Attainment Performance Outcome Claim. She provides the following check stubs. **Determine her income and hours for all 5 paychecks. Then determine her prospective income and compare that to the information entered on the Employment page to see if the EVF verification remains accurate.**
**Activity Answer: Marisol (Pink)**

Total Hours = 123  
Average Weekly Hours = 24.6  
Average Tips = $77.40  

Total Income = 694.50

Prospective Budget = 597.27

<table>
<thead>
<tr>
<th></th>
<th>Wages</th>
<th>Tips</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>Week 1</td>
<td>$37.50</td>
<td>$57.00</td>
<td>$94.50</td>
</tr>
<tr>
<td>Week 2</td>
<td>$55.00</td>
<td>$60.00</td>
<td>$115.00</td>
</tr>
<tr>
<td>Week 3</td>
<td>$75.00</td>
<td>$110.00</td>
<td>$185.00</td>
</tr>
<tr>
<td>Week 4</td>
<td>$75.00</td>
<td>$90.00</td>
<td>$165.00</td>
</tr>
<tr>
<td>Week 5</td>
<td>$65.00</td>
<td>$70.00</td>
<td>$135.00</td>
</tr>
</tbody>
</table>

Calculation: $694.50/5(=138.90)x4.3 = $597.27

Does your prospective budget calculation match the Employment page? No

Are any updates to the Employment” page required? Yes, because this is fluctuating income and the paycheck stubs provide a better average.

Discuss the prospective budget calculation before moving on to the next slide.

---

View the Employment page and updates. Because there are two types of wages, it is entered as follows:

- Averaged the number of weekly hours, 123/5=25.
- Then $2.50/hourx25=$62.50 for regular wages. Add.
- Tips average is $387/5=$77.40, so it is entered as Total Amount Per Pay Period. Add.

Note the Comments section refers to Case Comments due to lack of space.

---

**Detailed Case Comments** with the employment calculation, prospectively budgeted.
Ending Employment

Describe how to end employment, emphasizing that it should be End Dated at the top of the page only when the individual will positively be receiving no more income from this employer.

Note that it is a best practice to $0 the income and check all the eligibility determination before entering the End Month. This ensures the income is no longer being budgeted. Again, when ending employment, the worker may need to prorate the income for the last month of employment based on when the last paycheck is received.

FEPs may see that employment is end dated in this section, but the End Date is left blank at the top of the page. Or, they may have the need to enter it this way. This is because it has not been verified that employment has ended or a last paycheck has been received, or possibly that the individual may go back to this employer.

Loss of Employment

Discuss that FEPs must enter the Loss of Employment page when either of the following two instances occur. State that one instance is on the Employment Gatepost page and the other is on the Employment page.

Inform the class that if a W-2 applicant or participant answers Y-Yes or ? - Doesn’t know or Questionable to the question “Has anyone in your household recently refused employment or lost employment or voluntarily reduced hours?”, CWW schedules the Loss of Employment page.

Employment Gatepost

State that when someone in the W-2 Group loses employment and an employment end date is entered on the Employment page, the Loss of Employment page is scheduled.

Discuss that in order for the Loss of Employment page to be scheduled, the employment end date must be the current date or a past date. If the employment end date is a future end date the Loss of Employment page will not be scheduled.
**Loss of Employment Page**

Inform the class that FEPs must enter the information listed in the bullet points on the **Loss of Employment** page when the page is scheduled. **Emphasize** the following bullet points and the answers that should always be selected.

- Change Type? (always select UN – Unknown)
- Change Event Date
- Verification (always select Q? – QUESTIONABLE NOT YET VERIFIED)
- Good Cause (always select No)

State that FEPs should contact the assigned FoodShare worker after the case is confirmed for W-2 in order to coordinate eligibility confirmation.

**Self-Employment**

Note that W-2 applicants or participants rarely report self-employment, and it is very complicated to enter for FS and MA. Typically, a W-2 applicant or participant will report changes to the Change Call Center(s). If someone reports self-employment, communicate with the IM worker to determine the best approach for entering the information accurately.

Trainer Note: If anyone asks about Form 2131 – Self-Employment Income Report, Ginger Seery has asked that we send those questions to her. If a case is pending for self-employment, CWW sends out the DHS self-employment form with the verification request. It is different from the DCF form.
Questions

Any questions on what we have covered so far? That was a lot in that section. Fortunately, the next section is much easier… Accurately entering addresses is error prone, but keeping in mind a few simple rules, it’s pretty simple.

Signature Field and Addresses

General Case Information

Note that Signature Details are not security controlled, and if they “blank out” then the FEPs needs to re-enter the Yes responses for any program the case is receiving benefits for. They may have to return to the Case Information Summary page to get this information. Emphasize that this needs to be correct because an incorrect response could fail an IM program.
Discuss entering the address and the geographical location correctly. **Note** that some common errors seen at the state level are listed here.

**Activity: 5 Minute Highlighting**

**Instruct** trainees to read through the next two pages and highlight or underline the common errors in entering household address they may have seen or they may be prone to make, even if it hasn't happened to them yet. **Ask** a couple of people to share what they came up with.
Discuss changing the address. FEPs may change the address, but they should understand that household composition and rent will need to be re-verified by the FS worker or change call center if questionable and the W-2 applicant or participant is receiving FS. These are not required for W-2.
Briefly review the mailing address and the proper process for homeless people, particularly in Milwaukee. Note that the screen print and the PPT have the correct PO Box address for Vliet on them. Also note that Vliet wants no mail going to them for W-2, so the check will need to have a “hold” if that is the only address available. The W-2 applicant or participant will need to come to the agency and pick it up.

Transition

Are there any questions on accurately entering addresses?

The next section is absent parent information. This page is extremely important because it interfaces with KIDS so the Child Support Agency can work with W-2 participants to collect child support. The better the information entered here, the better the chances of getting some support to the family.
Absent Parent Information

**Absent Parent**

Discuss who must be referred to child support (W-2 Policy Manual 15.2.1).

1. Unmarried pregnant women, including minors;
2. Families where the natural or adoptive parent is absent from the home (but not cases when the absence is because of military service); and
3. Non-marital co-parent cases (families where the parents either are not married to each other or were not married to each other when the child was born), and where paternity has not been established. Fathers with children needing paternity establishment are:
   - Acknowledged father, non-conclusive: voluntary acknowledgement without an effect of a judgment of paternity (pre May 1, 1998 in Wisconsin);
   - Alleged father: named by custodial parent as probable father; or
   - Claimed father: father lives with the child, claims to be the father, but paternity has not been established.

Households with fathers in the home with children for whom paternity has been established should not be referred to the CSA. This would include:

1. Acknowledged fathers, conclusive: voluntary acknowledgment with an effect of a judgment of paternity; or
2. Adjudicated fathers: paternity established through a court order.

Note that the child(ren) for whom information must be gathered are listed at the top of the page.

If there is more than one absent parent, then a page must be created for each one.

Note that sometimes when there is a minor parent in the household (18-19 year old), then this page will request data on both of the minor parents’ parents as well as the minor parent’s child’s absent parent. This is because the minor parent could still be eligible on a parent’s case, so it wants that absent parent information. Because the minor has her own case, both her parents are considered absent. Additionally, the minor’s child’s absent parent information must be entered. So, a minimum of 3 absent parent pages are required in this type of case.

The Absence Begin Date is not used for any program, so the FEP can simply use the application date.
Describe the process for searching for the absent parent.

Remember, if the parent states the father is unknown, then enter it and refer to child support for further determination.

Note that FEPs should make an effort to ask for as much information about the absent parent as possible. Simply entering “Unknown” is not a good practice and creates pages and pages every day of referrals with unknown parents to Child Support. They should enter “Unknown” only when the father is truly unknown.

If the parent reports multiple potential fathers, then enter them all on a separate page and refer to child support for further determination.
Absent Parent Search by Individual

Searches for any absent parent associated with the PIN of the child.

**Emphasize** that FEPs should enter any available information. This will help child support, and they will verify it and use it to contact the absent parent.

**Emphasize** that for W-2, everyone is referred to child support.

If there is a good cause claim, then the FEP must notify child support within 2 working days of the claim. Child support should not act on the referral until a good cause determination is made.
Note that when there is a pregnant parent in the household, that person is noted as the individual in the dynalist. If the potential father is known, then his name is entered in the Absent Parent Information field. Remind learners that if the Legal Parentage status is M - M – Maternity Indicator for Non-Married Pregnant Women, they must go back to update absent parent information once the child is born.
Add that any comments that would be helpful to child support in locating the absent parent should be noted. Also, if there is a good cause claim then enter that in the comments. Remember this page is not secure, so no confidential information should be entered.
Note that if the parent is cooperating with child support then he or she is also cooperating with caretaker relative and medical support liability.
Emphasize the importance of updating the non-cooperation fields if the CSA reports non-cooperation.

Additional information regarding non-cooperation at intake:

- If the W-2 case closes due to non-cooperation with child support and the W-2 Group reapply while a parent in the W-2 Group is not cooperating with child support without an exemption or good cause for the non-cooperation, the parent who failed to cooperate with child support must be left in the non-cooperation status. The W-2 Group is ineligible for W-2 services or a JAL until the parent cooperates or establishes good cause for non-cooperation.

- If a W-2 case closes for a reason other than non-cooperation with child support and the W-2 Group reapply while a parent in the W-2 Group is not cooperating with child support, the W-2 agency has 7 working days after the W-2 application date to determine if there are any of the three situations regarding the non-cooperation listed below. Then on (and not earlier than) the 8th working day, if the W-2 agency has determined there are none of the three situations, the parent who failed to cooperate with child support must be left in the non-cooperation status. The W-2 Group is ineligible for W-2 services or a JAL until the parent cooperates or establishes good cause for the non-cooperation.

  - **Note** the 3 situations referenced above:
    1. There is good cause or an exemption for the non-cooperation (W-2 Policy Manual 15.6.2 (Good Cause Reasons) and 15.5.1 (Non-cooperation Exemption for Pregnant Women or Custodial Parents with Newborns)).
    2. A good cause claim for non-cooperation has been filed and other eligibility criteria have been met, and the parent is cooperating with the W-2 agency in furnishing information to be used in determining the good cause claim.
    3. The CSA determined the parent in the W-2 Group who had not been cooperating now is cooperating.

Again, emphasize the need to provide the good cause claim form and to determine good cause.

Ask are there any questions so far?
**Activity: Absent Parent**

**Stand up and Break into 6 groups.** Assign each group a question. Give groups a minute to get an answer and designate a spokesperson. Ask each group to share their answer and explain it to the large group.

**Answers:**

3, the claimed father of the 1 year old, the other parent of the 3 year old, and the other parent of the 6 year old.

**Note to Trainer:** Although the claimed father and his 6 year old is not listed as part of the W-2 Assistance Group during eligibility determination, CWW requires an Absent Parent page for the other parent of the 6 year old.

2, the other parent of the 3 year old and the other parent of the 6 year old.

2 or 3, you need 1 for the other parent of the 3 year old and 1 for the other parent of the 6 year old. Then it depends on who the potential father of the unborn is. If it is one of the parents already listed, then the mother would be added with the maternity indicator for the unborn in the dynalist. If there is another potential father, then a 3rd absent parent page is needed.
Answers:

3, the mother of the 18 year old, the father of the 18 year old, and the father of the 1 year old. Note that in this example, the mother is not in the group; the 18 year old is requesting W-2 for herself and her child.

In what circumstances would a FEP NOT refer an absent parent to child support?

All absent parents should be referred to child support. The only exceptions according to policy are that households with the other parent in the home with children for whom legal parentage has been established should not be referred to the CSA. (W-2 Policy 15.2.1)

What should you do if there is a good cause claim, either at application or later?

Upon receipt of the Good Cause Claim form, the W-2 agency must notify the Child Support Agency within 2 working days of the date the Good Cause Claim form was signed. The CSA must not take any further action until the W-2 agency determines whether good cause exists. (W-2 Policy 15.6.3)

Transition

Ask if there are any questions on the activity. Explain that we have covered the major problem areas. Refer back to the flipchart from the beginning when they identified problem areas for themselves, and note those that were covered. Address 1-2 of the others that were not covered (resources or instructions). If there are more, then state you’ll come back to those at the end of the class if there is time.

For now, we have two remaining topics: Eligibility Determination and Placement.
Eligibility Determination

Initiate Eligibility

State that after all CWW pages are completed, eligibility must be run and the results confirmed.

Refer to the resources available related to running eligibility.

Note that if the FEP needs to determine CMF eligibility ignoring income and assets, check the Ignore W-2 income and asset tests to allow CMF eligibility to begin box.

Remind FEPs that they will need to run with dates if it is after Adverse Action and the change needs to apply to the first of the next month.

Eligibility determination is the process of comparing all of the non-financial information to the non-financial requirements and comparing all income and assets to program limits, and determining whether a group is eligible for W-2.

- CWW uses all the information that was entered related to a household and/or group, and compares it with the program requirements.
- CWW will begin using that information to determine eligibility when the FEP tells it to, and will use the information the worker provided to make this determination until the FEP tells it to stop (Begin and End Months). It works the same way every time.
- The FEP tells CWW what to do; CWW just uses its programmed functionality to do it.

Emphasize the importance of a good understanding of what the various fields in CWW are for and what they do, and how they impact various programs. Stress that it’s not enough to simply look at what CWW requires workers to enter (errors and red asterisks), but also to understand how it is using that information and how it impacts other programs.

Adverse Action

Define Adverse Action - the last day eligibility changes can be made for the following month.

Describe how it relates to W-2. For W-2, it really is telling the FEP when to run with dates. When the worker is aware the case is ineligible, the placement should be ended and the case should be closed in CWW.

If a Review is not completed prior to Adverse Action, the case may be closed. If asked about Adverse Action and Reviews, refer to the “W-2 Eligibility Review in CARES Worker Web (CWW) Desk Aid.” This describes how to re-open the case so the review can be completed, how to complete the override, and how to run eligibility with dates.
**Review** the example.

**Note** the variations in AA date.
State that the Reference Table Search is in the CWW Navigation Bar, and table TBIC can be accessed this way.

TBIC also shows BIP (Benefit Issuance Pulldown) dates and other eligibility/payment related dates that are important. Note that reference tables can be re-displayed to sort by any of the blue links across the top.
CWW Eligibility Determination Logic

Describe CWW Eligibility Determination logic. Refer back to the Adverse Action definition.

- At Intake, CWW is always looking for information starting with the Program Request Date and determining eligibility from that date forward.
- In an ongoing case, if it is before Adverse Action, CWW is looking at eligibility/changes beginning the first of the next month.
  - In May, prior to Adverse Action, CWW is looking at June 1 and forward.
- In an ongoing case, if it is after Adverse Action, CWW is looking at eligibility/changes beginning the first of the following month.
  - In May, after Adverse Action, CWW is looking at July 1 and forward.

Show the visual of this.

May = month 1
In month 1 prior to Adverse Action, changes affect month 2.

June = month 2
Any changes made after Adverse Action in month 1 and before Adverse Action in month 2 affect month 3.

July = month 3
Any changes after Adverse Action in month 2 affect month 4.

This really only applies to ongoing cases. At intake, CWW always begins with the program request/filing date.
**Note** the steps for entering employment and then using the Ignore W-2 Income and asset tests to allow CMF Placement to begin checkbox to determine eligibility for a CMF placement.

**Ask** are there any questions so far?
Our last section is related to W-2 placement.

**W-2 Placement**

State that this page allows placement of W-2 participants confirmed open for W-2.

Note that the page is scheduled in the driver flow, but the FEP is not required to complete it. He or she can bypass this page and come back to it later when the appropriate placement is determined.
Discuss the bullets related to comments, EVF, and automatic closures. These are general points about the page.

Discuss the FEP ID fields and implications.

Define a W-2 episode and remind FEPs that this is important for POP. Do not end date a W-2 episode until the individual is leaving W-2 and the case is closing.

Discuss the bullets related to the W-2 Episode section. Give examples of circumstances in which an Episode End Reason would not be required (financial reason, failure to verify, anything that has to do with W-2 eligibility in CWW) and would be entered (non-participation, failure to complete and EP, any reason related to WP participation).
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. Refer to the Target Type and Placement.

Explain that placements or W-2 participant in placement are changed by simply choosing a different W-2 participant and/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. Prior to saving the page, this information can be reset with the Reset button.
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).

**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.
- Multiple updates to AELR letter to include additional information related to placement, Vendor payment, Estimated/Prorated payment, EFT payment, and Hold Benefit information.

**Future and Back Dating**

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

**State** an automatic process runs each day CARES is available to change the placement with the placement 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 he or she has determined the correct placement, a new future begin date can be entered.
Ask trainees to read through the example. Illustrate the example on the whiteboard/flipchart.

Note these exceptions to the 10-day future dating rule:
Explain that if a W-2 participant will no longer be eligible for W-2, a future W-2 Episode End Date can be entered 30 days in advance, to when the W-2 participant would no longer be eligible.

State that if a W-2 participant is in a CMC placement, the FEP can future end date the CMC placement to the 56th day. If the FEP has not updated the Future Placement Information section prior to the end of the business day on the 56th day, CWW will auto close the case on the 56th day from the date of birth.
Activity: Future Dating Placement Scenarios
Break into 3 groups. Instruct each group to complete 1 scenario, determining FEP actions and CWW results.

Answer: Scenario 1
1. The FEP completes the Future Placement Information section on the W-2 Placement page showing a CSJ placement and Placement Begin Date of June 7.
2. The system will automatically end Shannon’s CMC placement June 6 and begin her CSJ placement June 7.
3. The FEP goes to the CARES mainframe and updates Shannon’s Employability Plan on WPAS and activity codes on WPCH.

Answer: Scenario 2
1. The FEP enters the employment information on the Employment page.
2. Through the driver flow, initiate eligibility by clicking on the box to ignore assets and income tests to allow CMF placement to begin.
3. Confirm Eligibility.
4. The FEP enters the Future Placement Information section on the W-2 Placement page showing that Alexis’s placement will be CMF beginning on July 13.
5. The FEP goes to CARES mainframe to update Alexis’s Employability Plan on WPAS and activity codes on WPCH.

Answer: Scenario 3
1. The FEP enters the updated information on the Employment page.
2. The FEP clicks on the Check for Non CMF Eligibility button on the W-2 Placement page and clicks Next, bringing up the Initiate Eligibility page.
3. The FEP initiates eligibility and then confirms eligibility.
4. The FEP enters new placement information showing that Rob is in a CSJ placement with today as the begin date.
5. The FEP updates WPEL with the updated employment information, updates his Employability Plan on WPAS and activity codes on WPCH.
**W-2 Placement Summary**

State that after entering a placement on the W-2 Placement page, 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.

Ask if there are any questions on Placement.

**Activity: Key Point Summary**

Before moving on, ask participants to complete 1-2 of the following in their minds:

- I learned…
- I feel…
- I was surprised…
- I was wondering…
- I re-discovered…
- I realized…
- I appreciated…
- Next time I’ll…
- I’m excited about…
- I…

Ask 1-3 people to shout out their responses.

**Closing**

Highlight what was covered today and provide reminders regarding Desk Aids in the Learning Center. Answer any questions. Refer to the list from the beginning of class and determine whether there is additional information or resources that can be provided.

Point out the Appendices.

Provide evaluations and ask trainees to complete and turn them in before leaving.
Appendices

**Note:** These TN are available only if the trainer has time and wants to go through some of the high points.

The appendices on the following pages are for reference only. Briefly discuss the importance of accurate verification and coding for pending verification. This is all explained on the following pages.

The last page is a couple of tidbits, odd things that CWW does and many people wonder why.
Verification

Emphasize the need to enter correct verification for all required items. Note it’s important to know what is required for W-2 because CWW defaults to NQ-NOT QUESTIONABLE for many items.

Even if an item is NQ, if the verification is available, it should be entered. But don’t require the applicant to verify with documentation if it’s NQ. It is recommended that workers print W-2 Policy Manual 4.1.2 and use it as a desk aid.

Discuss the items that require verification for each program. Note that household relationships are verified only if questionable and not specifically listed in 4.1.2 because they are covered by marital status and custody of children.
Verifying and Documenting Eligibility Information

**Define** validating and documenting.

**Note** that it is essential that FEPs not over-verify. This means they are asking for things that are only verified once and have been, or they are requesting verification for things that do not require verification. For many things, a verbal statement is correct.

**Common examples of over-verifying:**
- Requiring a Social Security card
- Requiring school enrollment verification for 18-19 year olds (this may be relevant to work program participation, but not to eligibility determination). Eligibility should not be delayed for this.
- Requiring a marriage license if the applicant is married
- Requesting information on expenses
- Household Address
- Photo ID (only once)
**CWW Process Help 50.1 Verification**

Again, **emphasize** the need to know the policy!

**Discuss** the various codes that are available and when they are used when requesting/not receiving verification.

**Emphasize** the importance of using the correct code so that W-2 is affected, but not IM programs. Discuss that the references to examples in the chart are examples from Process Help document.

<table>
<thead>
<tr>
<th>Code</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>?</td>
<td>Verification is not yet not provided but was requested. The verification is mandatory for all programs.</td>
</tr>
<tr>
<td>WN</td>
<td>Allows workers to deny W-2 and/or CC while continuing to pend BC+, CTS, FS, and/or MA. Use this code when ? or Q? was initially used to pend the case when required verification was requested. This accounts for the 7 day vs. 30 day verification timelines. Refer to and discuss Example 2.</td>
</tr>
<tr>
<td>Q?</td>
<td>Verification is not mandatory per program policy., but the worker has determined a claim is questionable (e.g., household relationship). <strong>Note</strong> that if the W-2 worker finds an item questionable and pends the case, this must be documented in Case Comments and the IM worker should be notified. If this verification is not provided, the W-2 worker should use the WN code to deny W-2 eligibility.</td>
</tr>
<tr>
<td>PN</td>
<td>Allows workers to pend W-2 and/or CC while continuing to pass BC+, CTS, FS, and/or MA. Use this if the information was already verified but needs to be re-verified for W-2 and/or CC (e.g., Employment). Refer to and discuss Example 1.</td>
</tr>
<tr>
<td>FN</td>
<td>Allows workers to deny W-2 and/or CC while continuing to pass BC+, CTS, FS, and/or MA. Use this when verification is needed for all programs but to account for the 7 day vs. 30 day verification timeline. Also use it when PN was used to pend the case and the verification was not provided timely.</td>
</tr>
<tr>
<td>NV</td>
<td>Verification was requested, but it has not been verified and the ? was initially used to request the verification.</td>
</tr>
<tr>
<td>QV</td>
<td>Verification was requested, but it has not been verified and the Q? was initially used to request the verification.</td>
</tr>
</tbody>
</table>

**Generally used by IM (W-2 will use WN; IM may later change it to NV or QV)**
Refer to the Verification Checklist.

Refer to the Verification Due Dates page and the ability to extend the due date if the applicant/participant requests it. Extend only W-2, not IM programs.

If the IM due date is later than the W-2 due date in an ongoing case, then extend the W-2 due date to match. This rarely occurs because of the 7 business day timeline for W-2 and the 10 calendar day timeline for IM. The dates are usually the same, but not always, because of weekends and/or holidays.
Additional Tidbits

Transition

And finally, some last items…

These are a couple of extra issues that were reported while researching this project.

9 Month Live Error

Discuss how to resolve the 9 month live error.

Primary Person

State and emphasize that under no circumstances should FEPs change the primary person on a case.

- Note that the primary person does not have to be the same person as the placed participant on the W-2 Placement page.
- It is also okay if the primary person is receiving or begins receiving SSI/SSDI as a result of W-2 assistance with advocacy. The case may still be open for W-2 if there is another parent in the household.

Sorting Activity – Recording a W-2 Request

The steps to recording a new W-2 request for the activity on page 6.

Complete the Basic Information page

Select Create New RFA from the Potential Individuals Matches page

Complete the information on the Additional Data page

Select YES for W-2 on the Program Request page

Print the application and obtain the signature for all adult applicants

Enter the Registration Filing Date and W-2 Program Filing Date on the Complete Request for Assistance page.