Trainer's Notes

Practical Applications in CWW

Purpose:
The purpose of this course is to develop a clear awareness of specific CWW processes.

Learning Objectives
Upon completion of this course, you will be able to:
- Accurately verify and track Social Security Number applications.
- Complete absent parent information to assist with Child Support collections.
- Correctly enter employment information based on various circumstances.
- Define CWW logic, including Begin Month/End Month and prospective eligibility determination.
- Describe W-2 Placement processes, including episodes, future dating, and CMF/+ logic.

Table of Contents

Materials

Trainer Materials
Practical Applications in CWW: Trainer's Notes
Practical Applications in CWW: PPT (We suggest you email this to yourself when using a trainer computer that is not yours.)
Trainer Computer with Internet Access
WAMS ID and password
Completed Angela Scenarios – 20 for learners, 2 for trainers
Completed Entry Determination Worksheet for trainers
Sticky notes with one Angela case number for each per learner
Three Sheets of Paper (numbered 1, 2, and 3)
Tape
Prepared Cards for Employment Page Heads Up
Sticky notes
Ball of yarn
Laminated picture of a family

Learner Materials
Practical Applications in CWW: Participant Guide
WAMS ID and password

Complete Prior to Class

Angela Case Scenario

Create Angela cases within the same month of the class, but at least 3 days prior to class (20 for learners, 1 for trainers to show in class, and at least 1 backup)

- RFA
  - Angela, Female, 37 years old
  - ES, 5518, Eau Claire, Apartment #, zip 54701, (715) 444-3215
- Eligibility
  - Ben 8 years old, all BC, all have SSN, all born in WI, declined to answer ethnicity and race
  - Angela DR MA, all single, all currently living in WI, no fleeing felon, all 01-Independent
  - Angela pregnant, Tim is the father of Ben, baby father unknown
  - Ben is enrolled in 3rd grade (SR) Lakeshore Elementary, WST (AR)
  - Employed started 10/21/2018, 15 hours per week making $8.50/hour at Festival Foods, paid bi-weekly
  - Placed – CS2

At the start of class, give one Angela case to each learner. You can do this by putting a sticky note at each computer station with an Angela name and case number.

Suggested Pace

This course is a full 6-hour course. The following agenda is the suggested pace for the day.

9:00 – 9:15	Introduction, Network with Someone Who…, Course Overview
9:15 – 9:35	Social Security Numbers
9:35 – 9:40	Sit/Stand Energizer
9:40 – 10:15	Absent Parent
10:15 – 10:30	*Break*
10:30 – 11:10	Employment
11:10 – 11:25	Employment Heads Up
11:25 – 11:45	Eligibility Determination, Running with Dates
11:45 – 12:00	Placement
12:00 – 1:00	*Lunch*
1:00 – 1:15	Failing Case – Teresa
1:15 – 1:30	Returning to Employment, Air Writing Energizer
1:30 – 1:45	Failing Case – Jessica, Ending Employment
1:45 – 2:00	Failing Case – Regina, Multiple Rates of Pay
2:00 – 2:15	*Break*
2:15 – 2:55	Group Entry
2:55 – 3:35	CWW Logic for CMF/+ Placements, Independent Entry
3:35 – 3:55	Your CWW Network, Closing

Note to Trainer: Whenever you see , it indicates that the section is a guided entry and should be completed with learners. Whenever you see , it indicates that you should show the field(s) you are talking about to learners. Remember to go slow during walkthroughs and entries to allow for your co-trainer to show/type on the screen.

Introduction

PG 1

PPT 1

Good morning and welcome to Practical Applications in CWW. This course is designed to help you gain additional knowledge regarding specific processes in CWW for ongoing cases.

Network with Someone Who…

PPT 2

PG Appendix A (31)

TN Appendix B

Purpose: Familiarize learners with various terms associated with CWW.

Materials: none

Estimated Length: 10 minutes

Directions to Trainer: Ask learners to read the directions on the handout and choose one box where they feel comfortable writing their name. After this is done, ask learners to mingle with each other, filling in each box of their handout with another learner's name. Learners are trying to get a different person's name in each box. Stop the activity after 8 minutes, or after most learners have the boxes complete, whichever is earlier.

Trainer Instructions to Learner:
Step 1: Read through the statements in each box of the Network with Someone Who handout. Choose one of the questions that you can answer and write your name in the box. Write your name in only ONE box. After you write your name in a box, stand up.

Step 2: Now mingle with the other learners in the room and introduce yourselves. While talking to other learners, find someone who can answer a question that is not marked on your sheet. After they answer the question, add their name in the box. Try to get all your boxes filled with a different name. It's okay if you don't as we will be covering everything today. When the music begins, you are free to start.

Click to start music for the activity.

Click to stop music at end of activity.

Course Overview

As we mentioned earlier, our day focuses on covering specific processes for ongoing cases in CWW. This includes:

- CWW Logic, including begin months, Adverse Action, and running eligibility with dates;
- Social Security Numbers;
- The **Absent Parent** page;
- Entering and updating employment, including different scenarios with changes in income; and
- W-2 Placement, focusing on back and future dating.

We will cover these processes by working through Angela's case. Angela has a son, Ben, and is pregnant. She currently works 15 hours a week and is in a prorated CSJ placement. We've created one for each of you. Throughout the day, we will briefly explain a process; then all of us will complete the process together in CWW by making changes to Angela's case.

General CWW Desk Aids and Training on Demand

Page 4 of your Participant Guide lists some general Desk Aids and a Training on Demand video available in the Learning Center that you may find helpful. Throughout the course, your guide references many resources that are available to you, including Process Help in CWW, other Desk Aids, Training on Demand videos, and Policy references.

CWW Training Environment

Now it is time to get into the CWW Training Environment. Follow along with us to get logged in and find Angela's case listed on the sticky note at your station. As we walk through various entries in CWW today, we plan to spend more time on certain pages and pass through others. When updating a case with a participant, be sure to cover all the pages to ensure you capture all updates.

Guided Entry

- **Go** to CWW Training Environment by accessing the Training Systems Gatepost page: https://trn.cares.wisconsin.gov/

- **Logon** to CWW Training Environment using your WAMS ID and password.

- **Enter** Angela's Case number in the Quick Select field and click Go.

Stand up when you are on Angela's **Case Summary** page, so we know you are ready.

Proper Use of Dates

PG 4

Notice the Process Help 3.5 Proper Use of Dates reference in your guide. This is the first reference you will see about process help in CWW. Use process help any time you want more information on how CWW thinks, such as page begin dates.

For ongoing cases, the **Begin Month** is the first month CWW uses the non-financial and financial information being entered to determine eligibility. CWW continues to use that information until an **End Month** is entered or a new **Begin Month** with new information is entered for that sequence. The **Begin Month** is also the first month the new income or expense appears in the eligibility budget.

Guided Entry

Note to Trainer: The guided entry scenarios, in italics, are not in the Participant Guide.

Let's start working with Angela.

Angela had her baby girl two days ago and is in your office to update her case.

- **Scroll** down to the bottom of the **Case Summary** page to the **Enter Begin Month for New Data** field. Entering the Begin Month/Year on this page saves you from entering the Begin Month/Year on the pages that will be updated.
- **Enter** the Month/Year from two days ago in the Begin Month field.
- **Click** Add Person, and then **click** Next to navigate to the next page.

Remember, CWW uses the **Begin Month** you enter to decide when to start using the new information. When adding a person, you need to enter a **Begin Month** of the date the person became part of the household. Because Angela has a newborn, we used the month of the baby's birth date as the **Begin Month**.

Social Security Numbers

PG 5

Note to Trainer: Any time you see an underlined word in the TN that signifies there is a corresponding fill in the blank in the Participant Guide. Learners should write that underlined word in the blank in their Participant Guide.

We are now in the Add Person Driver Flow. You do not need to make entries right now. We will explain the process first, then continue with Angela. Use the Add Person Driver Flow any time someone new, such as a significant other or child, enters the household.

We are following this driver flow together during our entries with Angela. The first page we come to is the **Household Members** page.

When entering an SSN, you must enter *C-COMPLETED REQUIREMENTS* in the **SSA Verification** field. This code allows CWW to perform a cross check with Social Security Administration's (SSA) database to verify the SSN and birth date. If there is any discrepancy, the data exchange (DX) will provide that information, and you must re-verify with the applicant. Never enter W-WORKER VERIFIED, as this prevents the cross match.

After a valid cross match happens with DX, the **SSA Verification** field updates to *V-VERIFIED*. This verifies the household member's birth date as well. For W-2, date of birth must be verified only once. If SSA verification code shows verified, entering NQ-NOT QUESTIONABLE in the **Birth Date Verification** field is allowed.

A verbal report of the SSN is acceptable; a Social Security Card is not necessary because of the DX verification.

If W-2 applicants or group members do not have an SSN, the W-2 applicants must verify that they have applied for an SSN for all W-2 Group members except individuals initially exempt. The applicants or participants have six full calendar months from the date of the SSN application to provide the SSN. You can collect the SSN beginning in the 7th full calendar month, and it must be provided by the end of the 13th full calendar month after the SSN application date. CWW prompts you to collect the SSN any time you complete an intake interview, review, or program add.

Ask In what instances would you not enter an SSN on the **Household Members** page? *Answer: Newborns, Qualified Non-Citizens without SSNs*

If the individual being added falls into either of those categories and the SSN is not available, leave the **SSN** field blank on this page. Add this information on the **Permanent Demographics** page.

Guided Entry

Let's begin adding Angela's baby to her case.

Angela states her baby girl's name is Julia, and she was born two days ago. She applied for Julia's SSN but hasn't received it yet.

- **Enter** Julia's first name and last name (same as Angela's).
- **Select** Female as her **Gender**. Do not enter any information in the **SSN** or **SSA Verification** fields.

- **Enter** two days ago as her **Birth Date.** Typically, you would complete a birth query in CWW to verify the birth date. We cannot complete that function in training. **Enter** BQ-BIRTH QUERY in the **Verification** field.

- **Click** Next.

- **Click** Next past all the request pages.

Note to Trainer: Learners will need to update the **Begin Month** and filing dates if the case was created in a different month than the classroom training. If learners updated the **Begin Month** and filing dates, they may need to complete the **Interview Details** page as well.

- **Select** that Julia is the DAU-DAUGHTER of Angela on the **Household Relationships** page.

- **Select** that Julia is the HSR-HALF-SISTER of Ben.

- All of the fields should be filled out for Julia's **Household Relationships** page. **Click** Next.

- **Click** Next twice to run clearance for Julia.

- Julia should pass clearance. Raise your hand if she did not. **Click** Next.

- **Click** Next past the **General Case Information** page and the **Electronic Contact Information** page.

Permanent Demographics

PG 6

We all should be on the **Permanent Demographics** page. This page records demographic and race information for all individuals in the case and allows you to conduct a Birth Query.

In order to conduct a Birth Query, the following conditions must be met:
- The verification code selected for either **US Citizenship Verification** or **US Citizenship MA Verification** will result in eligibility to pend or fail for at least one program;
- Real-time DX with SSA already has been initiated for this individual; and
- **Birth Place** is Wisconsin or left blank.

Remember, a Birth Query cannot be used to verify U.S. Citizenship for individuals born outside of Wisconsin.

For SSN applications, the applicant or participant should have a receipt that they can use for verification. If no SSN was entered on the **Household Members** page, then the **SSN Application Date** and **Verification** fields are required, except for individuals who are initially exempt.

When the SSN is provided, update the **Household Members** page with the SSN.

Use the **SSN Override Verification** field to pend a case for lack of SSN by entering ?-NOT YET PROVIDED. If a mismatch occurs during the data exchange with SSA, CWW generates an alert, and you use this field to pend the case and request proof of the individual's SSN.

The **SSN Information** section of the **Permanent Demographics** page also is where you indicate if a Qualified Non-Citizen without an SSN has a **W-2 Initial Exemption** and enter the **W-2 Initial Exemption Date**.

Guided Entry

Let's add information to Julia's **Permanent Demographics** page.

Angela provides her hospital discharge paperwork, which includes a copy of Julia's application for a Social Security Number. She declines to provide Julia's ethnicity and race.

- **Select** E-ENGLISH as Julia's Language.
- **State** she is a U.S. Citizen and **enter** BQ-BIRTH QUERY as the **US Citizenship Verification.**
- **Select** WI-WISCONSIN as her **Birth Place**.
- **Enter** 123456789 as the **State File Number.**
- **Enter** an **SSN Application Date** of two days ago and HR-HOSPITAL BIRTH RECORD as the **Verification**.
- **Select** Decline to Answer for **Hispanic or Latino/a** under **Ethnicity** and YES for **Decline to Answer** under **Race**.
- **Click** Next
- On Julia's **Current Demographics** page, **state** SI-SINGLE-NEVER MARRIED for **Marital Status**, Yes for **Intent to Reside in WI**, and No for **Fleeing Felon or In Violation of Probation/Parole**.

- **Enter** 01-INDEPENDENT (HOME/APT/TRLR) as the **Living Arrangement Type**.
- **Click** Next.
- **Click** the Based on client's response, populate blank fields as N icon at the bottom of the page, and then **click** Next.
- You now should be on the **Individual Non Financial Gatepost** page. Instead of clicking Next, **click Pregnancy** in the Navigation Menu on the left-hand side of the page.
- **Enter** a **Pregnancy End Date** of Julia's birth date.
- **Click** Next twice.

Sit/Stand Energizer

Estimated Length: 5 minutes

Directions to Trainer: Read each statement below, asking learners to stand if that statement is true for them or sit down if the statement is not true for them.

Trainer Instructions to Learners: Before we dive into the **Absent Parent** page, take a moment, and stand up at your station. I will read several statements. If a statement is true for you, stay standing. If a statement is untrue for you, sit down.

Statements
Stand if…
This is your first classroom training as part of New Worker.

You were born in Wisconsin.

You know what CWW stands for.

You learned something new about CWW Begin Months today.

You have ever accessed Process Help in CWW.

You have entered an SSN application date and verification on a real case.

You find the **Absent Parent** page confusing.

Absent Parent

PG 7

We've arrived on the **Absent Parent** page. This page gathers information about absent parents and the caretaker relative's cooperation in obtaining child support and medical support liability. Be sure to gather as much information about the absent parent as possible to assist Child Support in establishing paternity for a child. Entering "Unknown" on this page is not considered best practice and creates numerous referrals with unknown parents to the Child Support agencies. If the **Absent Parent** page already has been created by the Income Maintenance agency, review the information with the applicant or participant to ensure accuracy.

Notice the banner at the top of the page that reads **"Information For The Following Absent Parent(s) is Required."** The banner lists the child(ren) who need an absent parent listed. If there is more than one absent parent, then you must create a page for each absent parent.

On the top right of the page there is a progress bar. For Angela, there one absent parent sequence. If the sequence is complete the progress bar shows as gray. If there are multiple sequences and additional entries are necessary, the progress bar shows the progress with white rectangles.

If the other parent is known, then click the Check if Absent Parent Known box. Enter the parent's name in the **Absent Parent Information** section.

If the absent parent is unknown and the parent reports multiple potential other parents, enter each one on a separate absent parent page and refer to IV-D (Child Support) for further determination.

The **Absent Parent Information** and **Absent Parent Address** sections are where you enter an absent parent's information. The **Absent Parent Information** section allows you to search to see if an absent parent is known to CWW. The following fields are required in the **Absent Parent Information** section: **First Name**, **Last Name**, and **Gender**. The **SSN** and **Birth Date** fields are not required in this section but should be entered if the information is known.

The next section is the **Absent Parent Additional Information** section. Here the **Absence Begin Date**, **Refer to IV-D**, and **Absence Reason** are all required fields.

The **Absence Begin Date** is not used for any program, so you simply can use the application date.

Further down the page is the **Children of this Absent Parent /If Child is Unborn, Enter Child's Mother** section. This is where you choose the individual for whom CWW is requesting absent parent information and that person's current legal parentage status.

When there is a pregnant parent, like Angela was, in the household, choose that individual in the **Individual** field, and select **M-Maternity Indicator for Non-Married Pregnant Woman** from the **Legal Parentage Status** dropdown. After the child is born, remember to go back to update absent parent information.

When a minor parent is in the household (under age 19), the **Absent Parent** page requests data on the minor parent's parents as well as the minor parent's child's absent parent.

In the **Comments** section, enter any comments that may be helpful to the Child Support Agency. Also, comment whether the parent is claiming good cause. Confidential information must not be entered here, as this screen is not secure.

Who Must Be Referred to Child Support?

PG 8

PPT 3

Before we move any further down the page, let's discuss who must be referred to child support. According to the W-2 Manual, you must send a referral to child support in following certain instances. Please record the answers in your Participant Guide.

- *Unmarried* pregnant women, including minors;
- Families where the natural or adoptive parent is *absent* from the home (but *not* when the absence is because of military service); and
- *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.

PPT 4

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

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

Caretaker Relative Cooperation Information

PG 9

Next, let’s move to the **Caretaker Relative Cooperation Information** section. This section gathers information about whether the custodial parent is cooperating with Child Support. The following fields are required in the **Caretaker Relative Cooperation Information** section: **Begin Month** and **Individual**.

Cooperation with Child Support is required for all programs. At intake, W-2 applicants always are considered as cooperating (even if they state they may not) if there is no indicator of noncooperation. They must be given the opportunity to cooperate with Child Support or claim good cause if they are shown as being in noncooperation.

If an individual is cooperating with Child Support, then they also are considered to be cooperating with Medical Support Liability.

If there is a good cause claim, then you must notify the Child Support Agency within 2 working days of the date the Good Cause Claim form was signed. Child support should not act on the referral until a good cause determination is made. Good Cause determinations are recorded in the **Child Support Information** section. This is separate from the IM determination.

Guided Entry

Let’s update the **Absent Parent** page for Angela’s case. Note that the banner at the top tells us CWW wants information on Julia’s other parent.

Angela states that Jake is Julia’s father. Jake didn’t sign the paternity acknowledgement form, so paternity has not been established for Julia.

- **Check** the **Absent Parent Known** box.
- **Enter** Jake for the first name, and make up a last name.
- **Select** Male as his gender. (**Note to Trainer:** Do not click Search)
- **Select** Julia from the **Individual** dropdown in the **Children of this Absent Parent section**.

- **Select** N-Paternity Not Established for this Child from the **Legal Parentage Status** dropdown.
- **Click** Add to add Julia's paternity status to the dynalist.
- **Click** the Edit Button (pencil icon) from the dynalist to update Angela's legal parentage status.
- **Click** Delete. **Select** LB-Live Birth from the Delete Reason dropdown.
- **Click** Update.
- **Click** Next twice to move on from the **Absent Parent** page to the **Asset Gatepost** page.
- **Click** Next to move on from the **Asset Gatepost** page. Angela has reported no changes to her assets.

Building Absent Parent Pages Activity

PG 10-11

PPT 5-8

Purpose: To familiarize learners with how **Absent Parent** pages are built in CWW based on family make-ups.

Materials: Participant Guide, PPT, separate sheets of paper (numbered 1, 2, and 3), tape.

Estimated Length: 10 minutes

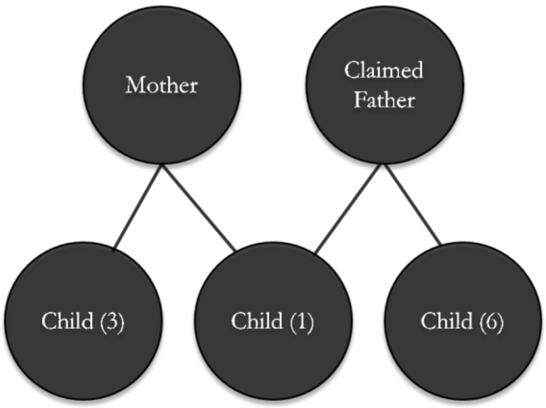
Directions to Trainer: Hang three sheets of paper, numbered one, two, and three, around the room. Display the family scenario graphic from the PPT, and ask learners to determine how many **Absent Parent** pages are needed for the family. After they have determined how many **Absent Parent** pages are needed, they should walk to that numbered sheet (if space is limited, have learners turn and point to the numbers). The family scenario graphics are in the Participant Guide for learner reference. Debrief with learners after each family scenario before moving on to the next.

Directions to Learner: Let's practice determining how many **Absent Parent** pages CWW will build based on a family's make-up. Notice the numbered signs hanging throughout the room; these signs indicate the potential number of **Absent Parent** pages needed. When we display the family scenario graphic, look at it and determine how many **Absent Parent** pages you think are needed. After you've decided on the number of pages, walk to that hanging sign. The family scenario graphics also are located in your Participant Guide for you to reference and record the number of **Absent Parent** pages.

<u>Scenarios and Answers:</u>

Click to display the scenario, then again to display the answer.

How many **Absent Parent** pages are needed for this family?

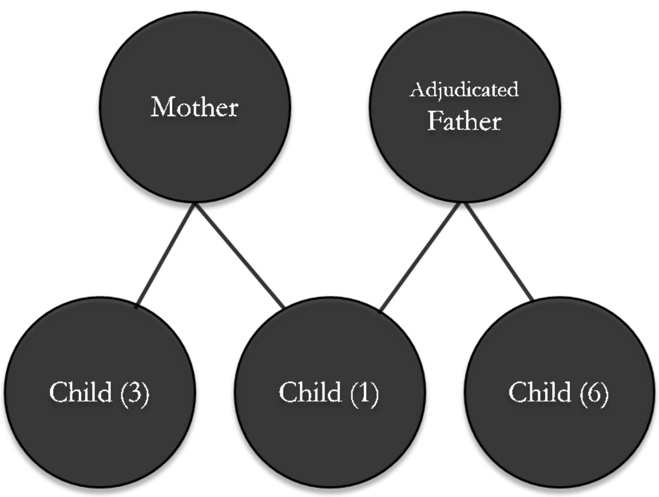


Answer: 3, the claimed father of the 1-year old, the other parent of the 3-year-old, and the other parent of the 6-year-old.

Note to Trainer: Although the claimed father and his 6-year-old are 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.

Click to display the scenario, then again to display the answer.

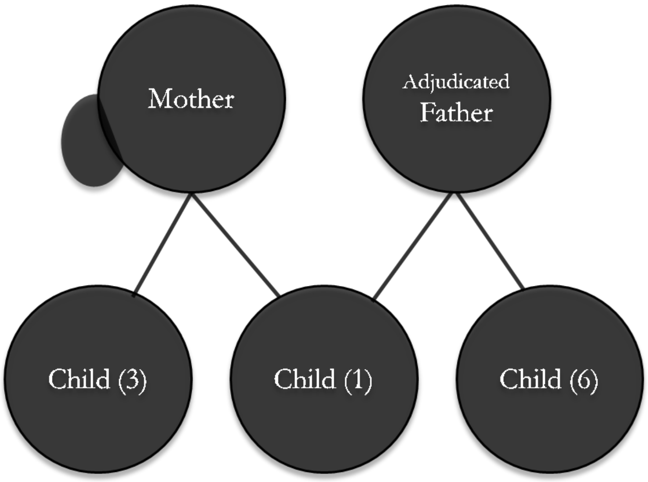
How many **Absent Parent** pages are needed for this family?



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

Click to display the scenario, then again to display the answer.

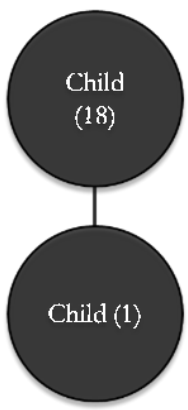
How many **Absent Parent** pages are needed for this family?



Answer: 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 child is. If it is one of the parents already listed, then the mother would be added with the maternity indicator for the unborn child in the dynalist. If there is another potential father, then a 3rd **Absent Parent** page is needed.

Click to display the scenario, then again to display the answer.

How many **Absent Parent** pages are needed for this family?



Answer: 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.

All absent parents, living or deceased, should be referred to child support. The only exceptions according to policy are 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 Manual 15.2.1)

Ask What should you do if there is a good cause claim, either at application or later?
Answer: 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 Manual 15.6.3)

Guided Entry

We have taken a closer look at SSNs and the **Absent Parent** page. Now, let's take some time to focus on the **Employment** page.

- Log back into CWW Training Environment.
- On the **Navigation Menu, click CARES Home. Select** Angela's case from the **Recent Cases** section.
- In Production, you need to review the employment query results. This feature does not work in training. **Click** Next past the **Employment Queries** page.
- **Select Employment → Employment** from the **Navigation Menu** on the left-hand side of the page.

Employment

PG 12

The **Employment** page collects employment information for each individual in a case with earned income. CWW calculates monthly income amounts automatically. It uses a different formula for MA than other programs. Update this page for all episodes of current employment, regardless of duration, or projected effect on eligibility.

Collect only current employment information in CWW. Past employment information gets collected and is entered in WWP on the **Work History** page to build work history information.

Begin Month

The **Begin Month** is the first month CWW will use the employment information in the eligibility determination. It will continue to consider the information entered on this page until a new **Begin Month** or an **End Month** is entered. The **Begin Month** is the month in which the change in income occurs.

For example, if a participant obtained a new job at the end of November, but will not receive a paycheck until December 1st, you would enter December as the **Begin Month** because that is when the change in income will occur.

Employer Information

Enter as much information as is available in the **Employment Information** section, including the "FEIN." Accuracy in completing the **Employment Information** section is critical to the Employer Verification of Health Insurance (EVHI) process.

The EVHI database uses employer information entered on this page to determine if the employee has access to an employer sponsored health insurance plan.
Enter the employer **FEIN**, or use the **FEIN Find** magnifying glass to look up the FEIN when entering employment. This will populate the additional employer information. Be mindful that when you receive the EVF, or when searching for the FEIN, the corporate name and franchise name may be different.

Employment Description

The **Employment Begin Date** must be verified using check stubs, the EVF form, a letter from the employer, or other acceptable written documentation.

Enter the **First Pay Check Date,** as it is necessary to determine the correct Begin Month and any override amounts.

For Angela, the **Employment Begin Date** should be 10/21/2018. Because Angela started this job prior to applying for W-2, it is okay for the **First Pay Check Date** field to be blank.

Strike Information

Strike information is used in determining 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

PG 13

It is important to calculate an accurate prospective budget so the employment information in this section is correct. You need to manually calculate and enter overrides each time there is a change in income, which includes starting and ending employment, to account for partial months' pay.

The **Pay Frequency** field determines how CWW calculates the information entered in the **Detailed Wage Information** section. This includes the **Rate Per Hour** field and the **Wage Type** field. Use the drop-down to select the appropriate **Wage Type** for that specific **Rate Per Hour**. There can be multiple **Wage Types** if the individual is paid overtime, weekend rate, holiday pay, etc.

When entering the **Average Hours Per Pay Period**, it is important to remember the pay frequency. It is common to be accustomed to using hours per week; however, this field is for hours per pay period and may be different.

Clicking the Add button adds the employment to the dynalist. CWW uses the information you entered to determine the amount per pay period based on the hours and pay.

Clicking the Edit button in the dynalist allows you to update the wage information. The **BC+ Pre-Tax Deductions** section is used only for BC+.

PG 14

The **Calculate** button converts the information you entered in the dynalist to monthly amounts for MA and other programs and completes the **Totals and Comments** section.

Different programs, such as MA, use different multipliers, so there may be a different amount in the **Monthly MA Gross Amount** field. You are concerned only with the **Monthly Converted Amount** field. You should never enter anything in the **Override MA Gross Amount** or the **Monthly Override Hours** fields.

The only field you should enter is the **Override Converted Amount** field, if needed. CWW uses this field or the **Monthly Converted Amount** field to budget the income in W-2 eligibility determination.

Angela's **Monthly Converted Amount** should be $548.25.

The **Comment** section is used to explain how income was calculated. If you enter an override, you must add comments about how you determined that calculation.

Family Major Medical Insurance Access for BadgerCare Plus

In the CWW production environment, you need to enter only 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. If you enter a **New Begin Month**, you will need to update the **Begin Month** in this section as well.

$0 Income

In some instances, a W-2 applicant or participant may maintain employment but have $0 income for a period of time. Examples of this include maternity leave, when a staffing agency assignment ends without another one starting right away, or a disability injury at work. $0 income is entered when the applicant or participant is maintaining employment but will have $0 income for a period of time.

If the individual is on paid leave, such as a work injury, then that income is entered on the **Unearned Income** page.

When entering $0 income, you need to determine when the applicant or participant will receive their last paycheck and how much it will be. That determines if you need to enter an override for the current or future months, and how many future months must be entered.

You must use the **Enter New Begin** Month fields when entering new data for future months. Use the **Begin Month** at the top of the page only for a new employment sequence. When entering future data, the message that only previous data is available displays. This happens because there is no future data to display, so CWW has to display the past data.

Guided Entry

Let's update Angela's **Employment** page.

Angela has not worked since she had her baby two days ago. Per the EVF, she will receive her last paycheck next Friday, with a total of 30 hours on it.

Ask What updates do we need to make to Angela's **Employment** page?
Answer: Adjust her income for the month, add a New Begin Month with $0 income

Note to Trainer: Ask learners to provide the answers during the guided entry in class.

- **Determine** how many paychecks Angela will receive for the current month and next month.
- **Calculate** the amount she will receive for the current month if she will not be receiving a full month's pay.
- **Enter** the appropriate override in the **Override Converted Amount** field, AF-AGENCY FORM in the **Verification** field, and comments if needed.
- **Enter** next month in the **Enter New Begin Month** field and **click** Go.
- **Scroll** down to the **Totals and Comments** section and **enter** the appropriate override in the **Override Converted Amount** field and verification in the **Verification** field.
- **Add** a comment indicating how you determined the appropriate override.

- **Add** an additional month in the **Enter New Begin Month** field and **enter** the appropriate override, verification, and comments if needed.

- **Click** Next to save.

- **Click** Next past the **Unearned Income Gatepost** page, the **Child Support Income** page, and the **Expense Gatepost** page. Angela reported no changes to her unearned income or expenses.
- **Click** Next past the **W-2 Time Limit Information** page.

- **Select** NA-Do Not Generate Summary from the **What would you like to do** field.

- **Click** Next.

Calculating Hours Per Pay Period

PG 15

PPT 9-13

Before we move on to the next page, let's revisit how we determine the appropriate hours to enter in the **Average Hours Per Pay Period** field. 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 take prospective budgeting calculations into account when calculating semi-monthly and monthly pay. For example, if someone is paid on the 1st and 15th of the month, CWW multiplies by 2.

In order for CWW to determine the correct income, we have to do a bit of math when entering the hours in the **Average Hours Per Pay Period** field. Take the applicant's or participant's hours per week and use the following multipliers to correctly determine what to enter.

Pay Frequency	Multiply Weekly Hours By
Weekly	x1
Bi-Weekly	x2
Semi-Monthly	x2.15
Monthly	x4.3

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

Let's do some practice determining **Average Hours Per Pay Period**.

LaToya is paid semi-monthly and works 20 hours per week. **Ask** What would you enter in the **Average Hours Per Pay Period** field? *20 x 2.15 = 43*

Frank is paid weekly and works 32 hours per week. **Ask** What would you enter in the **Average Hours Per Pay Period** field? *32 x 1 = 32*

Belle is paid bi-weekly and works 8 hours per week. **Ask** What would you enter in the **Average Hours Per Pay Period** field? *8 x 2 = 16*

Kara is paid monthly and works 35 hours per week. **Ask** What would you enter in the **Average Hours Per Pay Period** field? *35 x 4.3 = 150.5*

Employment Page Heads Up

Purpose: Practice describing commonly used fields on the **Employment** page while energizing learners.

Materials: Employment Page displayed on the screen, Index cards with field names written on them, or cardstock with field names printed and cut apart (1 set of cards for each group with groups of 3-4).

Use the following field names: Begin Month, Pay Frequency, FEIN, Wage Type, Override Converted Amount, Enter New Begin Month, Comment, Verification.

***Note**: If writing the field names on index cards, be sure to choose a writing instrument that does not show through the card.*

Estimated Length: 15 minutes

Directions to Trainer: Display the **Employment** page on the screen. Divide learners into groups of 3 or 4 and have the groups gather in different areas of the room. Distribute one set of cards, face down, to each group, divided among each person in the group (learners should have 2-3 cards each). Group members take turns flipping up a card and holding it up to their foreheads. The other group members give clues to help the person with the card guess the field. Trainers should walk around and give clues if learners are struggling.

Trainer Instructions to Learners: We just spent some time talking through the important fields on the **Employment** page, and now you have a chance to describe those fields to each other. Each of you has a set of cards, and on those cards are names of certain fields on the **Employment** page. One person in the group starts by flipping a card over and holding it up to their forehead. The other group members give that person hints by describing the field or what goes in the field. You cannot use the words in the field name. When the person guesses correctly, play moves to the next person in the group. Continue until you go through all the cards, then sit down when finished.

Eligibility Determination

Initiate Eligibility

PG 16

We are now at the **Initiate Eligibility** page. This page is where we begin eligibility determination. Eligibility determination is the process of comparing all the non-financial information to the non-financial requirements, then comparing all income and assets to program limits, and determining whether a group is eligible for W-2. Eligibility must be determined and then confirmed following an Intake, Review, and/or any change to CWW pages.

Remember, when determining eligibility:

- CWW uses all the information entered related to a household and/or group and compares it with program requirements.
- Using its programmed functionality, CWW uses entered information to determine eligibility when the FEP tells it to and will use the information the FEP provided to make this determination until the FEP tells it to stop.

CWW determines eligibility for program assistance groups on a monthly basis by looking at least one month ahead. Adverse Action is the last day of the current month where eligibility changes can be made for the following month. After Adverse Action, CWW starts looking two months ahead. Adverse Action is usually 13 days prior to the last day of the month. W-2 uses the Adverse Action date for eligibility determination, telling us when to run with dates and how many months to run with dates.

In your PG is an example of when to run with dates. Let's take a look at it now.

Example: Maya's father passed away and left her a car as of February 10. Maya reports she plans to keep this car. The car's equity value is $8,000. The FEP runs eligibility with today's date to include the vehicle in the asset budget for CWW in February. Then, the FEP must run eligibility again without dates to include the vehicle in the asset budget for March and beyond.

Notice the **Run Eligibility with Date** radio button. Clicking this button allows you to enter the date for which you'd like to run eligibility. When you want CWW to consider new information immediately, such as a person add or new income in the current month, you need to run with dates.

Guided Entry

Now let's practice running eligibility for Angela's case.

Initiate eligibility for Angela's case. Run eligibility for ongoing months.

- **Notice** the **Run Eligibility** radio button is selected automatically.
- **Click** Next.

Eligibility Run Results

Guided Entry

PG 17

After choosing to run eligibility and beginning the eligibility process, you navigate to the **Eligibility Run Results** page. Here we can see for which month(s) CWW currently is determining eligibility. Knowing the month(s) helps you determine whether running with dates is appropriate.

Ask For which month is CWW currently determining eligibility?

In the **Other Program Results** section, the eligibility results for the W-2 Assistance Group are displayed. Notice that the Benefit Begin Date is not the date of Julia's birth, and a future month is displayed. This is because we chose to run eligibility for ongoing rather than running with a date.

- **Navigate** back to the **Initiate Eligibility** page using the Previous button.
- **Select** Run with Dates and **enter** Julia's birth date and year.
- **Click** Next. Note the new **Benefit Begin Date**.
- **Click** Next to navigate past the **Eligibility Run Results** page.

Now we've navigated to the **Assistance Group Composition Details** page. This page summarizes the results for an Assistance Group as well as those for each person.

- **Click** Next to navigate past the **Assistance Group Composition Details** page.

Clicking Next navigates you to the **Eligibility Summary** page.

- **Click** Next to navigate past the **Eligibility Summary** page.

PG 18

We are now on the **Confirm Eligibility** page and are ready to confirm eligibility for W-2. Confirming the eligibility determination for W-2 is simple. Choose yes or no from the **Confirm** dropdown box and click Next.

Before confirming eligibility, ensure that the **Benefit Begin Date** displayed is the correct month for which you want to determine eligibility, and that the case is passing or failing appropriately. Angela's case should be passing. If it is not, raise your hand and a trainer will come assist.

- **Choose** Yes from the **Confirm** dropdown box and **click** Next. Eligibility is confirmed for ongoing, and you are navigated to the **W-2 Placement** page.

Now that we determined eligibility and confirmed W-2 as passing for Julia's birth month, we need to go back to the **Initiate Eligibility** page and run eligibility either with a date, due to Adverse Action, or without dates for ongoing in order to open W-2 for the remaining months. Let's return to Angela and finish confirming W-2.

Guided Entry

Note to Trainer: Depending on the timing of the month, learners may need to run with a date one more time in order to open W-2 properly.

Remember, we are adding a newborn to the case. Because of this, we first ran eligibility with the baby's birthdate in order to determine eligibility correctly for the case. For any other type of Person Add, use the date the person moved into the household.

*You just confirmed eligibility for Julia's birthdate. Now, return to the **Initiate Eligibility** page and run eligibility without dates. Confirm eligibility for the ongoing months.*

- Navigate to the **Initiate Eligibility** page using the navigation menu.
- **Click** the **Run Eligibility** radio button**.**
- **Click** Next.

- **Click** Next to navigate past the **Eligibility Run Results** page.
- **Click** Next to navigate past the **Assistance Group Composition Details** page.
- **Click** Next to navigate past the **Eligibility Summary** page.
- **Choose** Yes from the **Confirm** dropdown box if the case is open and passing eligibility. Do not confirm the case if it is failing eligibility.
- **Click** Next.

Running Eligibility with Adverse Action in Mind

PG 19

PPT 14-17

Purpose: To familiarize learners with how many times to run eligibility

Materials: Participant Guide, PPT, separate sheets of paper (numbered 1, 2, and 3), tape.

Estimated Length: 10 minutes

Directions to Trainer: Hang three sheets of paper, numbered one, two, and three, around the room. Display the scenario graphic from the PPT, and ask learners to determine how many times to run eligibility. After they have determined how many times to run eligibility, they should walk to that numbered sheet (if space is limited, have learners turn and point to the numbers). The scenario graphics are in the Participant Guide for learner reference. Debrief with learners after each scenario before moving on to the next.

Directions to Learner: Let's practice determining how many times to run eligibility. Notice the numbered signs hanging throughout the room; these signs indicate the potential number of times you need to run eligibility. Look at scenario and determine how many times you would need to run eligibility. After you've decided, walk to that hanging sign. There is a spot to record the correct answers in your Participant Guide.

<u>**Scenarios and Answers:**</u>

Click to display the answer.

Today is March 3. Barb is an ongoing participant and reports having a baby yesterday. She comes in and you add baby to the case right away.

How many times will you need to run eligibility?
Answer: 2; You need to run eligibility with the date of March 2 when Barb had the baby, and then run eligibility again without dates.

Click to display the scenario, then again to display the answer.

Today is March 19. Tamara reports she started a job two days ago and will receive her first paycheck next week.
How many times will you need to run eligibility?
Answer: 3; You need to run eligibility with the date of March 17 (2 days ago) when she started her job, then run eligibility with April 1 date, and then run eligibility again without dates.

Click to display the scenario, then again to display the answer.

Today is March 10. Eve is in your office to complete her initial eligibility appointment.

How many times will you need to run eligibility?
Answer: 1; When completing an initial eligibility appointment to determine if the applicant is eligible for W-2 you are unable to run with dates. You run eligibility without dates to determine eligibility from that point forward.

Click to display the scenario, then again to display the answer.

Today is March 31. Jacqueline reports that her daughter's father, Ronald, moved into the household 3 weeks ago. They both come in today to see if they are still eligible for W-2.

How many times will you need to run eligibility?
Answer: 3; You need to run eligibility with the date of 3 weeks ago when Ronald moved into the household, then run eligibility with April 1 date, and then run eligibility again

Placement

PG 20

We are now on the **Placement** page. This page allows you to place W-2 participants who are confirmed open for W-2 and enrolled in WWP. CWW schedules this page in the driver flow, but you are not required to complete it. You can bypass this page and come back to it after determining the appropriate placement.

W-2 Episode

The first section we see is the **W-2 Episode**. A W-2 episode consists of all placements from the date the case opens through the date the case closes and eligibility ends. Do not enter an **Episode End Date** unless you are closing the case and the participant is no longer receiving W-2 services.

The **Work Program End Reason(s)** remains editable until you confirm the W-2 case as closed. If you close a W-2 case for a Work Program related reason, then you must enter an **Episode End Date** and **Work Program End Reason**.

A **Work Program End Reason** is not required when closing the case for an eligibility reason. When confirming a case as closed for financial or non-financial reasons, a monthly batch process will end the Episode automatically on the last day of the month eligibility is open if you do not enter an **Episode End Date**.

Some placements automatically close at certain time frames without you having to enter an **Episode End Date**. There is a table of time frames for when cases would auto close based on placement in your Participant Guide.

Individual Placement Information

PG 21

The **Individual Placement Information** section is where you place participants. Only W-2 participants who are eligible for placement in a W-2 employment position show in the **Individual** field.

The placement options that display are based on the **Target Type** on the **W-2 Request** page. There is a table of available placements based on Target Type in your Participant Guide.

After entering the individual, placement, and placement begin date, click the Add button to add the individual to the dynalist. Prior to saving this page, the information can be reset with the Reset button.

Back Dating

On the **W-2 Placement** page, you can back date a placement for a maximum of *10* days from the current date or the program request date, whichever is later. Common occurrences of back dating include when a participant reports they started work or when a participant reports having a baby, like Angela.

For a CMC placement, you can back date to the date of baby's birth or the W-2 Application Date, whichever is later.

Guided Entry

Let's update Angela's **Placement** page. Her current placement should be a CS2.

- **Select** Angela from the Individual field.
- **Choose** CMC-CASE MGMT CARETAKER OF NEWBORN from the Placement field.
- We will be back dating Angela's CMC placement to Julia's birth date. **Enter** a date of two days ago in the **Placement Begin Date** field.
- **Click** Add.
- **Click** Next to save the page. You now should see a green bar at the top of the page stating that the CMC placement is valid through 56 days from Julia's birth. If no further action is taken on the case, Angela's case will auto-close at the end of the 56th day.

Ask Now that we have made all these changes, what is the final thing you need to add in CWW?
Answer: Case Comments

We are not focusing on or entering Case Comments today, but any time you make a change to a participant's case, you must enter comments within 24 hours.

You've covered a lot of ground in CWW today, all from the comfort of your computer chairs. Now we want to give you a chance to get up and stretch out, while continuing to keep CWW in mind.

Air Writing Review Energizer

☼ PPT 18

Directions to Trainer: Learners think of two key terms/concepts from CWW that they learned today. Then, they choose two body parts from the PowerPoint slide to spell out those key terms using each body part they chose. Learners spell each key term twice, once with each body part. Demonstrate what you are asking learners to do by spelling out Newborn Add with your elbow.

Trainers Instructions to Learners: Think of two key terms from CWW that we've talked about today. Now, choose two body parts displayed on the screen. There's no need to write them down; just remember them. Next, stand up and spell out the key terms from CWW using only the body parts you've chosen. Spell each word twice, using each body part you selected. When you are finished, sit back down. I'll start by spelling Newborn Add with my elbow.

Failing Case – Teresa Gomez

Purpose: Learners will identify the benefits of accurate system entries by identifying common errors that caused a case to incorrectly fail eligibility.

Materials: PG, Computers with CWW Training Environment

Estimated Length: 5 minutes

Suggested Modification: Provide sticky notes to learners and have them post the note on their computer monitor when finished instead of raising their Participant Guide in the air.

PG 22

Directions to Learner: Sometimes a case fails eligibility when you expect the case to pass. It is important to understand W-2 eligibility requirements and to troubleshoot when you receive a result you didn't expect. You have the case number in your Participant Guide that should have passed eligibility but was confirmed as failing. In order to ensure the family receives assistance, we are going to find what entries need updating to make this case pass. We aren't going to update anything we are just going to locate which page is causing the failure. You can take notes in your Participant Guide as we go through this failing case.

Directions to Trainer:

- **Enter** Teresa's case number (7104067671) in the Quick Select field and click Go.
- **Use** the navigation menu to navigate to Eligibility – Run Results – Eligibility Run Results.
- When running eligibility, this page is the first time you see if a case is passing or failing. If the result is not what you expect, stop here and take a close look at the application entry details.
- **Click** on the Reason Code (375) to see why the case is failing.

Debrief Question:

1. What needs updating to ensure the case entries are accurate?
   *Answer: On Nevaeh's **Household Relationships** page, it's indicated that Teresa did not have legal custody.*

Let's return to our Angela case continue with making entries.

Angela's Case – Returning to Employment

As you work with a participant, you continually move through the case management process. Because of that, you'll often be updating the case in CWW. Understanding how to properly update cases in CWW is a crucial part of processing changes. Let's practice making some updates to Angela's case.

Angela's CMC placement is ending soon, and she is scheduled to go back to work at Festival Foods next Monday. She states her hours and wages will remain the same as before she went on leave.

Ask What updates do we need to make to Angela's case?
Answer: Update her employment page to pend for employment verification, run eligibility, and create a future prorated CSJ placement

Guided Entry

Note to Trainer: Ask learners to provide the answers during the guided entry in class.

- On the **Navigation Menu, click CARES Home. Enter** Angela's Case number in the Quick Select field and click Go, or select her case from the Recently Accessed list.

Stand up when you are on Angela's **Case Summary** page, so we know you are ready.

- On the **Navigation Menu, click Employment** and then **click Summary.**
- **Click** the magnifying glass for the correct employment sequence.
- **Scroll** down to the **Override Converted Amount** field and **enter** Angela's previous wage amount.
- In the **Verification** dropdown, **select** ?-NOT YET VERIFIED.
- **Add** a comment regarding the change in employment.
- **Click** Next to go to the **Generate Summary** page.
- **Select** NA-Do Not Generate Summary from the **What would you like to do** field.
- **Click** Next.

We've navigated to the **Initiate Eligibility** page. Due to making changes that effect Angela's eligibility, CWW is telling us we need to run eligibility and pend for additional information.

Notice the **Ignore W-2 income and assets test to allow CMF/+ Placements to begin** checkbox. Only check this box when you are running eligibility for an individual placed/to be placed in a CMF/+ placement. This tells CWW to skip the income and asset tests for W-2. Since we are not running eligibility for CMF/+ placement, we will not be checking this box.

- **Click** Next to initiate eligibility.

We are now on the **Eligibility Run Results** page. Notice the eligibility status for W-2 is pending. We will look at that in more detail in just a second.

- **Click** Next.
- **Click** Next to navigate past the **Assistance Group Composition Details** page.

Verification Checklist

PG 22

Angela's case requires verification and is pending until the verification is received. Notice the box that says Pend on the **Eligibility Summary** page. Checking this box and clicking next (**check** the box and **click** Next) allows you to view the **Verification Checklist** and see exactly what verification is being requested.

Clicking the magnifying glass on the Verification Checklist (**click** the magnifying glass) navigates you to the page that is requesting additional verification. In Angela's case, we are navigated back to the **Employment Summary** page.

Click Next to return to the **Verification Checklist** page. **Click** Next.

We've navigated to the **Verification Due Dates** page. Here you see the date that verification is due; and if needed, can extend the due dates into the future.
Click Next.

PG 23

We're now on the **Pending/Not Verified Information** page. Use this page to view and update verification fields that may cause eligibility to pend or fail.

In Angela's case, we are pending for employment information; specifically, her **Override Converted Amount**. Clicking the checkbox and clicking Next causes CWW to navigate you to the specific page where information is pending.

By scrolling down the page, you see that the information requiring verification is highlighted yellow.

Click Next to leave the **Employment** page and go to the **W-2 Budget** page. Then click next to navigate to the **Confirm Eligibility** page.

After you receive the verification of income, go back and clean up the **Employment** page to ensure that income is counted correctly in each month. This means you may be updating the current month to ensure income is correct and building another month(s) for future income.

Future Placements

PG 24

On the **W-2 Placement** page, you are able to future date placements for a maximum of *10* days from the current date. Enter future placements based on the W-2 participant's current W-2 Target Type. A common occurrence of future dating is when a participant reports that they will start work in a few days, or when a CMC placement is coming to an end.

Guided Entry

Let's update Angela's placement based on her reporting that she will begin work on Monday. She will continue working 15 hours per week while pursuing her HSED.

- **Select W-2 Post Eligibility** on the Navigation Menu.

- **Click W-2 Placement** in the **W-2 Post Eligibility** dropdown.
- In the **Future Placement Information** section, **select** CS2-1/2 Community Service Job from the **Placement** dropdown.

- In the **Placement Begin Date** field, **enter** next Monday's date. On Monday, CWW automatically changes Angela's placement to a 1/2 CSJ. If the future placement failed, you would receive an alert.

- **Click** Next to save the page.

Failing Case – Jessica Kilburn

PG 24

Estimated Length: 5 minutes
Directions to Trainer: Learners look at a case in the CWW Training Environment to determine why the case incorrectly failed eligibility. In their PG, learners record the entry that needs updating for the case. Learners can work individually or in pairs. Give learners up to 5 minutes to find the error. (Case: **2104067120**)

Directions to Learner: We have another case that incorrectly failed eligibility. Working independently or with a partner, determine why the case didn't pass and the entry that needs updating for Jessica's case. The applicant's name and case number are in your

PG. Remember to use the navigation menu to start at the **Eligibility Run Results** page to find the reason the case failed, then go from there to determine the inaccurate entry. Record your answer in your PG and hold your Participant Guide in the air.

Debrief Question:

1. What needs updating to ensure the case entries are accurate?
   *Answer: On Jessica's **Current Demographics** page, the FEP indicated No for Intent to Reside in WI.*

2. Tell me about the steps you took to determine why the case isn't passing?

3. What steps do you need to do to re-open the case?
   Possible Answers: Open case again, fix error on Current Demographics page, run eligibility again, suppress the notice, etc.

Note to Trainer: Show how to suppress notices.

We are going to walk through how to suppress a notice.

Scroll down to **Worker Tools**

- **Click** Client Correspondence
- **Click** Suppression Search
- The Case/RFA number automatically populates if you are in the case.
- **Click** Go
- **Click** on any Notice available on the case
- **Click** Suppress or unsuppress selected correspondence request
- **Click** Next

You will see an informational message at the top that the selected trigger/duplicates has been suppressed.

You will see a YES next to the notice you suppressed.

Ending Employment

PG 25

PPT 19-20

We have discussed entering $0 income for a period of time and updating employment when a participant goes back to work. Now, we are going to cover ending employment.

First, you need to determine that the job has *ended* and that the participant will receive no additional *income* from that job.

If the participant is laid off or between assignments at a temporary agency, or in any other circumstance where they may return to the job, adjust the income, but do not enter an **End Month**.

At times, you may need to enter an **Employment End Date** but leave the **End Month** blank at the top of the page. You must do this when the *employment has not been verified as ended*, when *the last paycheck has not been received*, or when *that individual may go back to the employer.*

After you are sure the employment has ended and the participant will no longer receive any additional income from that job, you can enter an **End Month**.

It is best practice to zero out the income and check eligibility determinations prior to end dating the employment. This ensures that there are no hidden question marks, and no income is being budgeted. You may need to adjust the income for the last month of employment based on when the last paycheck is received.

Guided Entry – Loss of Employment

Let's enter a loss of employment for Angela.

Angela calls you upset and crying. She says she was fired today because she had to keep calling in due to childcare for Julia falling through.

You schedule her to come in for an appointment. Angela attends her appointment and tells you she will receive her last $120 paycheck on Friday, which you confirm with an EVF form. You complete the informal assessment in WWP and determine that a CSJ placement is the most appropriate for her.

- On the **Navigation Menu, click CARES Home. Select** Angela's case from the **Recent Cases** section.

- **Navigate** to the **Employment** page using the Navigation Menu.

- **Use** the Previous Effective Month button to navigate to the current month.

- **Select** Yes for **Employment Ended?**

- **Enter** today's date as the **Employment End Date** and a **Verification** of AF-AGENCY FORM.

- **Enter** Friday's date as the **Date of Final Paycheck** and a **Verification** of AF-AGENCY FORM. Do not enter an End Month at the top of the page because Angela still will receive one more paycheck.

- **Scroll** down to the **Detailed Wage Information** section.

- **Determine** if Angela will receive a full month's pay this month. If so, remove the override amount in the **Override Converted Amount** field. If not, **calculate** the appropriate override, **enter** the **Override Converted Amount** and **Verification** of AF-AGENCY FORM, and **comment** on your calculation.

- **Use** the Next Effective Month button to navigate to the next month.

- **Select** Yes for **Employment Ended?**, **enter** today's date for **Employment End Date** and a **Verification** of AF-AGENCY FORM, and **enter** Friday's date as the **Date of Final Paycheck** and a **Verification** of AF-AGENCY FORM. These sections must be updated for every month.

- **Determine** the appropriate override based on how many paychecks Angela will receive next month. **Enter** the amount in the **Override Converted Amount** field and a verification of AF-AGENCY FORM in the **Verification** field.
  Note to Trainer: If only two months were created previously, you would update the Verification field from ?-NOT YET VERIFIED to AF-AGENCY FORM.

- **Update** the **Comment** field with how you determined your override.

- If needed:
  - **Navigate** to the next month using the Next Effective Month button.
  - **Update Employment Ended?** to Yes, **enter** today's date for **Employment End Date** and **Verification** of AF-AGENCY FORM, and **enter** Friday's date as the **Date of Final Paycheck** and a **Verification** of AF-AGENCY FORM.
  - **Enter** $0 in the **Override Converted Amount** field, and update **Verification** to AF-AGENCY FORM.
  - **Update** your comments.

- **Click** Next.

- **Select** NA-DO NOT GENERATE SUMMARY for What would you like to do? and then **click** Next.

- **Initiate** eligibility with today's date.

- **Click** Next past all pages until you get to the Confirm Eligibility page. **Select** Yes to confirm eligibility.

- If needed:
  Navigate back to the **Initiate Eligibility** page and run with next month's date. **Click** Next past all pages and confirm eligibility.

- **Navigate** back to the **Initiate Eligibility** page and run without dates. **Click** Next past all pages and confirm eligibility.

- **Clear** Angela's future placement on the **Placement** page by clicking the Clear button.

- **Enter** a new placement of CSJ with today's date for Angela. **Click** Add. **Click** Next.

Let's take a break from Angela's case and look at another failing case.

Failing Case – Regina Marshall

Estimated Length: 5 minutes

Directions to Trainer: Learners look at a case in the CWW Training Environment to determine why the case incorrectly failed eligibility. In their PG, learners record the entry that needs updating for the case to pass. Learners can work individually or in pairs. Give learners up to 5 minutes to find the error. (Case: **1104067714**)

PG 25

Directions to Learner: We have another case that incorrectly failed eligibility. Working independently or with a partner, troubleshoot Regina's determine why the case didn't pass and the entry that needs updating for Regina's case. The applicant's name and case number are in your PG. Remember to use the navigation menu to start at the **Eligibility Run Results** page to find the reason the case failed, then go from there to determine the inaccurate entry. Record your answer in your PG and hold your Participant Guide in the air.

Debrief Question:

1. What needs updating to ensure the case entries are accurate?
   *Answer: On Rodney's **Current Demographics** page, the FEP indicated 15-OUT OF HOME for Living Arrangement Type.*

2. How did it feel to successfully find what needs updating?

3. About how long would it take you to find the inaccurate entries, correct them and get the case to pass eligibility as opposed to ensuring the entries were accurate in the first place?

4. In what ways could you create the right conditions to ensure you enter accurate information successfully?

Remember, confirm a case as failing only if you expect it to fail. Otherwise, go back and double check your entries. It is easy to click on a wrong code or scroll the wheel on your mouse in a drop-down menu, selecting a different entry.

Multiple Rates of Pay

PG 26

Before you complete additional entries on Angela's case, we need to talk about entering multiple rates of pay on the **Employment** page.

Note to Trainer: Navigate to Angela's **Employment** page.

In some instances, a single job will pay multiple rates of pay (e.g., regular pay rate, holiday rate, overtime rate, shift premiums, weekend premiums).

Ask What types of jobs have you seen with multiple rates of pay?
Possible Answers: waitress, retail, nursing home, factory.

You can add up to <u>*four*</u> types of pay in the **Detailed Wage Information** section dynalist for the same job. Enter the **Rate Per Hour** and **Average Hours Per Pay Period** for that wage type, then select the appropriate type from the **Wage Type** drop down. Because each wage type must be added separately, click the Add button to move an entry to the dynalist before starting the next one. When adding a tips wage type, complete the **Total Amount Per Pay Period** field instead of the **Rate Per Hour** and **Average Hours Per Pay Period** fields. After you enter all wage types, click the Calculate button to populate the **Totals and Comments** section.

Group Entry

PG 26, PG Appendix C (33-35)

TN Appendix C

Directions to Trainers: Break learners up into groups of 2-3 and have them complete entries for updates to Angela's case. Field-by-field entry instructions are not given, only relevant information needed to make the updates. Groups will have 25 minutes to complete the entries. As learners make their entries, have a trainer complete the entries for the Angela training case as well. Mute the projector while learners make their entries, so they do not see the entries you are making. See scenario below and Entry Determination Worksheet for the entries you need to make. When all learners have completed their entries, or 25 minutes have passed, turn the projector back on to go over the answers as a group.

Directions to Learners: In a moment, we are going to break you out into groups. As a group, read the group entry scenario and determine what updates are needed. Then make the updates together in CWW. Make sure everyone updates their Angela case as you will be making additional updates to Angela's case later. You have 25 minutes to make your entries. Angela's case should remain open and passing. If your case is failing, please ask a trainer for assistance prior to confirming. After time is up, we will check our entries as a group.

Angela attends today's ongoing appointment. She also provides you with a document showing that paternity has been established for Julia. She reports she started a full-time cashier position with Menards this morning. With Angela in the office, you call Menards, and they fax over a completed EVF form (see PG Appendix). You run through an informal assessment with Angela and determine she is appropriate for a CMF+ placement. Angela declines this placement but agrees to a CMF placement.

Make the appropriate updates in CWW.

Entries for group check

Let's walk through the correct entries for Angela. If your entries do not match ours, you can fix them along the way.

- **Navigate** to the **Absent Parent** page from the Navigation Menu.
- Y-LEGAL PARENTAGE ESTABLISHED FOR THIS CHILD should be selected for Julia's **Legal Parentage Status** on Jake's **Absent Parent** page.
- **Navigate** to the **Employment Summary** page from the Navigation Menu. An employment sequence for Menards should be listed. **Click** the magnifying glass to review Angela's Menards employment.

- **Click** the **Previous Effective Month** button to view the first month that income is being received. This should be the month/year three weeks from today.

- Employer Information:
  Menards should be listed as the **Employer Name**, 3988985 as the **FEIN**, 3619 S Hastings Way as the **Address**, Eau Claire as the **City**, WI-WISCONSIN as the **State**, and 54701 as the **ZIP**.

- Employment Description:
  R-REGULAR EMPLOYMENT should be listed as the **Employment Type**, today's date as the **Begin Date**, AF-AGENCY FORM as **Verification**, three weeks from today as **First Pay Check Date**, No for **Employment Ended?**.

- No should be selected for **On Strike?**.

- Detailed Wage Information:
  B-BI-WEEKLY should be selected for **Pay Frequency**. There should be three entries in the dynalist.
  - One should read $16.30 for **Rate Per Hour**, REG-REGULAR PAY for **Wage Type**, 64 for Average Hours Per Pay Period, AF-AGENCY FORM for **Verification**, and 1,043.20 for **Total Amount Per Pay Period**.

  - Another should read $19.30 for **Rate Per Hour**, WKD-WEEK END PAY for **Wage Type**, 16 for Average Hours Per Pay Period, AF-AGENCY FORM for **Verification**, and $308.80 for **Total Amount Per Pay Period**.

  - The last one should read $24.95 for **Rate Per Hour**, OTP-OVER TIME PAY for **Wage Type**, 10 for Average Hours Per Pay Period, AF-AGENCY FORM for **Verification**, and $249.50 for **Total Amount Per Pay Period**.

- An override may be entered in the **Override Converted Amount** field with a verification of AF-AGENCY FORM. Comments should be entered detailing how the override was calculated.

- **Navigate** to the next month by clicking the Next Effective Month button. An override may or may not need to be entered, depending on the date of the first paycheck. Comments should be updated.

- Navigate to the **Initiate Eligibility** page from the Navigation Menu. The box should be checked for Ignore W-2 income and asset tests to allow CMF/+ Placements to begin.

- Navigate to the **Confirm Eligibility** page from the Navigation Menu. Angela's case should be open and passing.

- Navigate to the **W-2 Placement** page from the Navigation Menu. Angela should be placed as a CMF- CASE MGMT FOLLOW UP as of today's date.

Rebus Puzzles Energizer

PG Appendix B (32)

PPT 21

Estimated Length: 5 minutes

Directions to Trainers: Inform learners of what a Rebus puzzle is and then go over the example in the PPT. After you go over the example, instruct learners to decipher the Rebus puzzles on the screen and in the Appendix of their Participant Guide. Once learners believe they know the answer, they should use their annotations tools to write on the PPT. After a learner is correct, or 30 seconds have passed, reveal the answer.

Trainer Instructions to Learners: Rebus puzzles are riddles that are made up of pictures and/or words. Let's take a look at the example on the PPT.

There is a palace image shown with a minus "a" after that. Palace minus one "a" leaves place. The next image is a mint with "i" equals "e" after that. When you replace the "i" in mint you get ment. When you add those together, you come up with the solution to the riddle, which is placement.

Decipher the Rebus puzzles as they display on the screen. They are also found in the Appendix of your Participant Guide. When you think you know the answer, shout it out.

Answers:

Absent Parent, Household Members, CS2, Social Security Numbers, Driver Flow

CWW Logic for CMF/+ Placements

PG 27

When you placed Angela in a CMF placement, you told CWW to ignore her income and assets. Doing this changes how CWW thinks, which is reflected on certain pages.

W-2 Placement Page

The first change is on the **W-2 Placement** page. Because we checked the **Ignore W-2 income and assets test to allow CMF/+ Placements to begin** box on the **Initiate Eligibility** page to place Angela in a CMF placement, the Check for Non-CMF/+ Placement Eligibility button now is enabled. This occurs only when any of the current or future eligibility month(s) was overridden for CMF and CMF+ purposes. Clicking this button will disregard the current CMF or CMF+ placement, cause CWW not to override the eligibility result (i.e., include income and assets in the eligibility determination), and schedule the **Initiate Eligibility** page.

Use this button if a participant is placed in CMF or CMF+, and you are considering a placement change (maybe due to loss of employment). This button would determine whether the case is financially eligible when income and assets are counted and not overridden.

W-2 Budget Page

Note to Trainer: Navigate to **Eligibility** - **Budgets** – **W-2** in the CWW Navigation menu.

PG 28

The **W-2 Budget** page allows you to view the detailed calculations that CWW used to determine the countable income and assets for the W-2 Assistance Group. Proper entry of income and assets is crucial to ensure a correct budget for eligibility determination. Checking the **W-2 Budget** page for accuracy helps ensure your entries are correct.

The Assistance Group Overview section shows you the **Eligibility Begin Date**, or the month that this budget is for, and the **Determination Date.**

The **Result** section provides an overview of the eligibility determination, indicating if the case is open or closed, if overall eligibility passed or failed, and if income and assets passed or failed. Notice that the **Income/Asset Test Skipped** field reads YES. This means that we checked the Ignore Income and Assets box on the Initiate Eligibility page and explains why the income test failed, but the case still is open and passing.

Further down the page, you can see what CWW counts for income and assets based on what you entered. This is a good place to see a quick overview of anything that may be incorrect. For example, look at the **Assistance Group Size** in the **Gross Income Test** section. CWW counts three people in Angela's assistance group when determining her income limit. If we did not correctly add Julia to the case, the Assistance Group Size would be two. This is one way to check if you have correctly added a person to a case.

Independent Entry

PG 29, PG Appendix D (36)

TN Appendix D

Directions to Trainers: Learners will complete information for Angela independently. Field-by-field entry instructions are not given, only relevant information needed to make the updates. Learners will have 10 minutes to complete the entries. As learners make their entries, have a trainer complete the entries for the Angela training case as well. Mute the projector while learners make their entries, so they do not see the entries you are making. When all learners have completed their entries, or after 10 minutes have passed, turn the projector back on to go over the answers as a group.

Directions to Learners: Before we close out the day, we have one more set of entries for Angela. A few months have passed, and she is in your office an appointment with you. Use the independent entry scenario in your Participant Guide to make updates to Angela's case independently. You have 10 minutes to make your entries. Angela's case should remain open and passing. If your case is failing, please ask a trainer for assistance prior to confirming. After time is up, we will check our entries as a group.

Angela attends an appointment with you. She states that she loves her job at Menards, and her supervisor asked if she would be interested in becoming a manager. Angela states she is unsure if she wants to apply for a management position. She says she would like the opportunity to lead a team, but is worried that she is not ready for the extra responsibility. Angela provides you with her last three paystubs, and states you will be her first call if she does decide to apply for the position. See the Appendix for a copy of her paystubs. She provides Julia's Social Security Number (make up a number). She reports no other changes to her case.

Entries for independent check

Let's walk through the correct entries for Angela. If your entries do not match ours, you can fix them along the way.

- **Navigate** to the **Household Members** page from the **Navigation Menu**. Julia now has an SSN listed with an **SSA Verification** of C – COMPLETED REQUIREMENTS.

- **Navigate** to the **Employment Summary** page and click the magnifying glass for her Menards job.

- The **Average Hours Per Pay Period** should be updated in the **Detailed Wage Information** dynalist.
    - REG – REGULAR PAY: 61.33 hours per pay period

- WKD – WEEKEND PAY: 16 hours per pay period
- OTP – OVER TIME PAY: 4 hours per pay period

Note to Trainer: If asked, use the following information to describe how we determined the averages.

We need to use 30 days' worth of paystubs to update the ***Average Hours Per Pay Period*** *fields. We received paystubs with the dates of 4/18/20 – 5/1/20, 5/2/20 – 5/15/20, and 5/16/20 – 5/29/20. Because the last two paystubs cover only 28 days, we must use all three paystubs to determine the correct average.*

Regular Pay: 56 + 64 + 64 = 184; 184 ÷ 3 = 61.33333

Weekend Pay: 16 + 16 + 16 = 48; 48 ÷ 3 = 16

Overtime Pay: 0 + 5 + 7 = 12; 12 ÷ 3 = 4

- **Navigate** to the **Confirm Eligibility** page from the Navigation Menu. Angela's case should be open and passing.

Today we have covered some of the sticking points in CWW, including CWW logic, the **Absent Parent** page, the **Employment** page, and running eligibility with dates. Before we close out our day, find the evaluation we placed at your station. Take a few moments to begin filling that out if you haven't done so already.

Your CWW Network

Purpose: Learners self-reflect on the material that's been covered throughout the day and share one takeaway.

Materials: Ball of yarn, laminated picture of a family

Estimated Length: 15 minutes

Directions to Trainer: Give learners two minutes to think about the material that was covered during the training and choose one takeaway they are willing to share with the class. Then have the class stand in a circle. Ask for a volunteer who is willing to share their takeaway first and give them the ball of yarn. After they share their takeaway, they hold the end of the yarn and toss it to someone else in the circle. That learner then shares their takeaway, holds their portion of the yarn, and tosses it to the next learner. Continue until all learners have shared and a web is created in the middle of the circle. Then, place the picture of the family in the middle of the web. Say the closing statement while still in the circle.

Directions to Learner: We are going to wrap up our day by taking a couple minutes to think about everything we have covered. Come up with one takeaway you can start implementing when you get back to the office to better serve participants. You don't have to write it down, just be prepared to share.

Now, everyone come stand in a circle facing each other. You will take turns sharing your takeaway and then tossing this ball of yarn to the next person to share. Be sure to hold onto a piece of the yarn before you toss it. We will continue until everyone has shared. **Ask** Who would like to start?

Closing

☼ PPT 22

Thank you all for sharing your takeaways! You do your part to support the families across Wisconsin by making accurate entries in CWW. When CWW gives you an unexpected result, or something is not working out the way you think it should, reach out to your network. This could include going to co-workers, supervisors, or QA staff for advice, or even the Learning Center for desk aids, reference guides, and Training on Demand videos. Have a great rest of your day!

Trainer's Notes Appendix

Appendix A: Entry Determinations

General Information:
Angela states her baby girl's name is Julia and she was born two days ago. She applied for Julia's SSN, but hasn't received it yet.

Angela's Case Number: __________ Month Case Was Created: __________

- Julia's Birth Date: __________
- Begin Month/Year: __________
- Adverse Action Date: __________
- Time of the Month Class is Occurring (Before or After Adverse Action): __________
- Number of Months to Run with Dates: __________

Employment – Maternity Leave:
Angela has not worked since she had her baby two days ago. She will receive her last paycheck next Friday with a total of 30 hours on it. Angela was being paid bi-weekly, working 15 hrs/wk and earning $8.50/hr.

- Date of Last Paycheck: __________
- Number of Paychecks Receiving for Current Month: __________
- Override Needed for Current Month: __________
- Next Begin Month/Year: __________
- Number of Paychecks Receiving for Next Month: __________
- Override Needed for Next Month: __________
- Additional Month/Year Needed: __________
- Override Needed for Additional Month: __________
- Dates Needed for Running with Dates: __________, __________

Employment – Back to Work:
Angela's CMC placement is ending soon, and she is scheduled to go back to work at Festival Foods next Monday. Her hours and wages will remain the same as before she went on leave.

- Date Going Back to Work: __________

Employment – Loss of Employment:

Angela calls you upset and crying. She says she was fired today because she had to keep calling in due to childcare for Julia falling through.

You schedule her to come in for an appointment. Angela attends her appointment and tells you she will receive her last $120 paycheck on Friday, which you confirm with an EVF form. You complete the informal assessment in WWP and determine that a CSJ placement is the most appropriate for her. Angela was being paid bi-weekly, working 15 hrs/wk and earning $8.50/hr.

- Employment End Date: __________
- Date of Last Paycheck: __________
- Number of Paychecks Receiving for Current Month: __________
- Override for Current Month: __________
- Number of Paychecks Receiving Next Month: _________
- Override for Next Month: __________
- Additional Month/Year Needed: __________
- Override Needed for Additional Month: __________
- Dates Needed for Running with Dates: __________, __________

Group Entry:

Angela attends today's ongoing appointment. She reports she started a full-time cashier position with Menards this morning. She also provides you with a document showing that paternity has been established for Julia. You run through an informal assessment with Angela and determine she is appropriate for a CMF+ placement. Angela declines this placement, but agrees to a CMF placement.

Employment Information:
Menards, 3619 S Hastings Way, Eau Claire 54701, 39-88985
Starts today, first paycheck 3 weeks from today
Pd bi-weekly
64 hrs at $16.30/hr per pay period (regular pay), 16 hrs at $19.30/hr per pay period (other shift/weekend pay), and 10 hrs at $24.95/hr per pay period (overtime pay) – grand total of $1601.50 per pay period or $3443.22 monthly converted amount
Ignore Income and Assets box should be checked each time running eligibility (with and without dates)

- Date of First Paycheck: __________
- Begin Month/Year for Employment Sequence: __________
- Number of Paychecks Receiving for 1st Month Paid: ___________
- Override Needed for 1st Month Paid: __________
- Number of Paychecks Receiving for Next Month Paid: __________
- Override Needed for Next Month Paid: ___________
- Dates Needed for Running with Dates: __________, __________

Appendix B: Network With Someone Who…

Put your name in one box that you can answer. Then, meet and greet with your peers. Record the name of someone who…

Is excited to attend this training course and will share one thing they are especially excited to learn more about.	Can describe a situation where $0 income would be used.
Can define Adverse Action and when a FEP needs to run with dates.	Can name two resources available for workers to get more information on CWW processes.
Will share one CWW tip or trick that they have learned.	Can explain the difference between the **Monthly Converted Amount** field and the **Override Converted Amount** field.
Can explain why a FEP must enter **C-COMPLETED REQUIREMENTS** as the verification code when an SSN is provided by an individual.	Will share an area of CWW that is a trouble spot for them.
Can describe how CWW determines who needs an **Absent Parent** page.	Can explain what the term **Begin Month** means in CWW.

Appendix C: Angela Menards EVF

WISCONSIN DEPARTMENT OF HEALTH SERVICES
Division of Medicaid Services
F-10146 (06/2020)

EVFE

Employer Verification of earnings form

This form is to verify employment and wage information for the employee listed below. You are required by law to complete and return this form by the due date indicated below. This form will be scanned so write clearly using blue or black ink. Write any additional comments in Section 4, the Employer Comments section. **Only employers can sign and complete this form. Printouts or paystubs can be submitted in lieu of this form. Include all of the requested information on the printouts.**

Section 1-Complete the employment status information by checking whether or not the employee is currently employed. If not, fill out the end date, final paycheck, gross pay, and reason employment ended

Section 2-If the employee listed is employed by your company, provide the start date and date of the first paycheck received below. Include the employee's position title, employment type, and pay frequency.

Section 3-If the employee has any pre-tax deductions, fill out the information including type of deduction, how much the deduction is, and how often the deduction occurs.

Section 4-Use the section below to add any comments concerning the employee's employment.

Section 5-By signing this form, you are saying that the information you provided is correct and complete to the best of your knowledge. This form **must be completed, signed, and dated** by the employer or designee. Please provide the title of the person completing the form, a telephone number, and/or fax number if available.

Submission Options
Submit your completed form by: ( )
You can either return the completed form to the local agency or give the form to the employee to return. To return to the local agency, fax or mail the completed form to:

Make sure you complete and return the form to the employee or local agency as soon as possible so that the local agency receives it by the indicated due date.

Employer Name	Employee Name
Menards **3619 S Hastings Way** **Eau Claire, WI 54701**	**Angela**
	Employee Case Number

SECTION 1 **Employment Status Information**

Is the employee listed above currently employed by your company?

☒ Yes ☐ No

If yes, go to Section 2. If no, complete the rest of this section and then go to Section 4 to sign and date the form.

Employment End Date	Reason Employment Ended ☐ Never employed ☐ Quit ☐ Strike ☐ Fired ☐ Other
Date of Final Paycheck	Gross Pay (before deductions) for Final Month $

SECTION 2 Employment Information

Employment Start Date Use today's date	Date First Paycheck Received Use 3 weeks from today
Position Title Cashier	Job Type ☐ Manager ☒ Non-Manager
Employment Type ☒ Full-time ☐ Part-time ☐ Temporary ☐ On Call ☐ Seasonal	Months Worked (for example, Sept. to Dec.) started today

Pay Frequency
☐ Paid Weekly ☒ Paid every Two Weeks ☐ Paid Twice a Month ☐ Paid Monthly ☐ Paid Irregular

Please provide an estimate for the next 30 days of the hours the employee is expected to work for each pay period. If the type of pay is regular, holiday, other shift, overtime, weekend, or other type of pay, write in the rate of pay the employee earns per hour.

Type of Pay	**Hours to be Worked Per Pay Period**	**Rate of Pay**	**Regular Work Hours** (for example, Monday-Friday, 8:00 a.m.–4:30 p.m.)
Regular	64	$16.30	Weekday schedule varies, ust work every other weekend, overtime hours vary depending on availability
Overtime	10	$24.95	
Other shift pay		$	
Weekend/shift differential pay	16	$19.30	
Other		$	

Salary Pay Details	**Salary Per Pay Period**
Salary:	$

Will the employee receive any of the following?			**How Much:**	**How Often:**
Tips (including cash)	☐ Yes	☐ No	$	
Bonuses	☐ Yes	☐ No	$	
Commissions	☐ Yes	☐ No	$	

SECTION 3 Pre-Tax Deduction Information

Does this employee have any of the following pre-tax or other deductions?

Type:	How much is the deduction?	How often?
Health Insurance Premiums	$	
Health Care Savings Account	$	
Parking and Transit Cost	$	
Group Life Insurance Premiums	$	
Retirement Contributions	$	
Flex Savings Account for Child Care or Other Dependent Care	$	
Other Deductions	$	

SECTION 4 Employer Comments

SECTION 5 Signature and Date

SIGNATURE – Employer/Designee *John Menard*	Date Signed Yesterday's Date
Print Name – First, Last, and Middle Initial John Menard	Phone Number 715-885-6126
Title Manager	Fax Number (if available) 715-885-6122

USDA Nondiscrimination Statement

This institution is an equal opportunity provider.

Appendix D: Angela Paystubs

Menards, 3619 S Hastings Way, Eau Claire, WI 54701, 715-885-6126

Angela	Fed. Filing Status	S/0	Check Date	5/8/XX
	Number of Allowances	0/0	Period Beginning	4/18/XX
Eau Claire, WI 54701	Federal Taxable Income	1221.60	Period Ending	5/1/XX
	Net Pay	1013.40		

Earnings	Hours/Rate	Amount	YTD Amount	Taxes/Deds	Taxable	Amount	YTD Amount
Regular	56/16.30	912.80	5785.60	Fed Income Tax	933.60	116.70	975.80
Weekend	16/19.30	308.80	1830.40	Social Security	933.60	56.02	456.96
Overtime	0/24.95	0.00	997.50	Medicare	933.60	12.14	99.04
				State Income Tax	933.60	23.34	190.40
Total Gross		933.60	8613.50	Total Withholding		208.20	1722.20

Menards, 3619 S Hastings Way, Eau Claire, WI 54701, 715-885-6126

Angela	Fed. Filing Status	S/0	Check Date	5/22/XX
	Number of Allowances	0/0	Period Beginning	5/2/XX
Eau Claire, WI 54701	Federal Taxable Income	1476.75	Period Ending	5/15/XX
	Net Pay	1224.37		

Earnings	Hours/Rate	Amount	YTD Amount	Taxes/Deds	Taxable	Amount	YTD Amount
Regular	64/16.30	1043.20	6828.80	Fed Income Tax	1476.75	141.47	1117.27
Weekend	16/19.30	308.80	2139.20	Social Security	1476.75	67.91	524.87
Overtime	5/24.95	124.75	1122.25	Medicare	1476.75	14.71	113.75
				State Income Tax	1476.75	28.29	219.29
Total Gross		1476.75	10090.25	Total Withholding		252.38	1975.18

Menards, 3619 S Hastings Way, Eau Claire, WI 54701, 715-885-6126

Angela	Fed. Filing Status	S/0	Check Date	6/5/XX
	Number of Allowances	0/0	Period Beginning	5/16/XX
Eau Claire, WI 54701	Federal Taxable Income	1526.65	Period Ending	5/29/XX
	Net Pay	1268.94		

Earnings	Hours/Rate	Amount	YTD Amount	Taxes/Deds	Taxable	Amount	YTD Amount
Regular	64/16.30	1043.20	7872.00	Fed Income Tax	1526.65	144.46	1261.73
Weekend	16/19.30	308.80	2448.00	Social Security	1526.65	69.34	594.21
Overtime	7/24.95	174.65	1296.90	Medicare	1526.65	15.02	128.77
				State Income Tax	1526.65	28.89	248.18
Total Gross		1526.65	11616.90	Total Withholding		257.71	2232.89