Wisconsin Department of Children and Families

Contract Transition Reports

Purpose

The purpose of this desk aid is to assist W-2 Contract Agencies during the contract transition with reports use.

Additional Resources

Each of the reports below are located in Business Objects WEBI. The Bureau of Analytics and Research page offers resources on WEBI Introduction for Employment Programs, which includes a full WISDOM Employment Programs Report Catalogue.

The W-2 Message Center stores W-2 Report Notification Listserv announcements regarding new reports and report modifications.

Reports

Monitoring Report 05: W-2 Participant Education Details

Location
Public Folders / DCF / WISDOM / Employment Programs / W-2 Monitoring / Application and Assessment
Use
This report assists W-2 agency staff in identifying expired or expiring Employability Plans (EP). This report includes EP Status, EP Begin Date, and EP End Date.
Notes
Use the report prompt to select the contract region. The tab entitled Currently Enrolled Participants, contains all W-2 participants in the W-2 contract region selected in the prompt who are currently enrolled in the W-2 program. For ease of use export the report tab to Excel and use the Filter function to sort EP End Date

Monitoring Report 03: Participants Without a Completed WWP Informal Assessment

Location
Public Folders / DCF / WISDOM / Employment Programs / W-2 Monitoring / Application and Assessment
Use
This report assists W-2 agency staff in identifying participants without a completed WWP informal assessment.
Notes
Use the report prompt to select the contract region. The report displays two tabs of information. The Monitoring Report 03 report has Informal Assessment start date and submit date information.

CL Report 01: W-2 Caseload Report

Location
Public Folders / DCF / WISDOM / Employment Programs / W-2 Case Management / Caseload Reports
Use
This report provides agency staff with a list of all placements. Additionally, the Eligibility Review Due Dates tab provides information about eligibility review due dates to assist workers in completing timely reviews.
Notes
Use the report prompt to select the month. Export the W-2 Participant Detail tab of the report to Excel. Use Excel Filter function to show only the placements you want to review. Then use the Filter Function to show only the W-2 Contract Region needed.

The Eligibility Review Due Dates tab is designed to be used only when the Report Month is the current month because it displays the eligibility review due dates as of the current month.

CMC Placement Detail Report

Location
Public Folders / DCF / WISDOM / Employment Programs / W-2 Monitoring / Placements
Use
This report details CMC placement and date placement should close. Placement is only for a certain amount of time. The agency needs to contact the participant as the CMC participant is approaching their end date to discuss employment and supportive service needs once the CMC placement ends. This ensures appropriate placement and benefits.
Notes
Select your contract region in the report prompt. The first tab, CMC Detail with Length Between 42 and 56 days identifies CMC cases that are approaching the end of their CMC placement.

Learnfare Caseload Report

Location
Public Folders / DCF / WISDOM / Employment Programs / W-2 Monitoring
Use
This report assists in Learnfare case reviews to ensure that the children in a case are enrolled timely.
Notes
Select your contract region and the report year-month. The Enrolled and Referred tabs will aid in identifying the cases to review.

Time Limits Report 01: Expiring Time Limits – 48 Month Transition Report

Location
Public Folders / DCF / WISDOM / Employment Programs / W-2 Monitoring / Application and Assessment
Use
This report aids agencies in adhering to policy and program rules related to 24/48 month extensions and subsequent extensions.
Notes
Select your agency region in the prompt. The Current Expiring and Raw Data tabs provide details about the cases and time used.

CAP Report 01b: W-2 Placements Closed by Batch Due to Lack of W-2 Eligibility

Location
Public Folders / DCF / WISDOM / Employment Programs / W-2 Financial Data / W-2 Capitated Payments
Use
This report identifies W-2 placements that closed by batch due to lack of eligibility for the month. Agencies should confirm that the closure was appropriate. Agencies are encouraged to reach out to participants on the report as a courtesy to notify them that their case closed. This way if they missed a paper notice regarding case closure, or there was other confusion, we can reduce the gap in the case being open and benefit issuance.
Notes
This report displays information one month behind. In November, you will complete the report prompt with October and will receive October closed cases. The report is updated on the 8th of the month.

CAP Report 01c: W-e Cases with Open Placements Episodes Pending for W-2 AG to be Closed

Location
Public Folders / DCF / WISDOM / Employment Programs / W-2 Financial Data / W-2 Capitated Payments
Use
This report aids workers with identifying cases that are pending for W-2 that will auto close at the end of the current month if no additional action is taken.
Notes
Select the report month and agency region. Know that this report updates with new data on Sunday. Use the Assistance Group (AG) Reason Code to review the case.

Participation Status Report

Location
Public Folders / DCF / WISDOM / Employment Programs / W-2 Monitoring / Application and Assessment

Use

The Participation Status Report provides a basic summary of the current participation statuses for PINs in WWP and provides information about participants who have a current participation status in order to identify participants who may have incomplete formal assessments, are in the process of applying for SSI or SSDI and the W-2 agency or another provider is providing related services, and/or are providing care to a dependent child or an adult W-2 group member with a disability or incapacitation.

Notes

Select the value(s) for the W-2 EC Area Region. EC stands for enrollment current.

EA 02 – Emergency Assistance Monthly Timeliness Processing

Location

Public Folders / DCF / WISDOM / Employment Programs/Emergency Assistance/New EA System (Beginning 1/1/2021)

Use

Timely Tab: The W-2 Agency's Emergency Assistance (EA) department will utilize this report to track and identify the timely processing of an individual's EA application. Untimely Tab: The W-2 Agency's Emergency Assistance (EA) department will utilize this report to track and identify the untimely processing of an individual's EA application.

Notes

When completing the opening prompt for the report the Year Month select filters the report results to display applications with Status Deadlines for that Year Month. The Status Date column is the date when the Status was most recently updated. Status Deadline Date is the due date on which the Status should be updated. Timeliness Due Date is the due date to process the application. This is 10 working days from Application Date to processing the application.

EA 06b – Emergency Assistance Application Pending or In Progress Beyond Deadline Date

Location

Public Folders / DCF / WISDOM / Employment Programs/Emergency Assistance/New EA System (Beginning 1/1/2021)

Use

In Progress Tab: The W-2 Agency will utilize this report to identify Emergency Assistance (EA) Applications with an In Progress status beyond the deadline date for the current month. The report will provide a total count and break down the count by W-2 Agency and EA Worker, list the EA Worker Name, EA Request Number, EA Application Date, Status, EA Application Deadline Date, the EA Application Age, and limited EA Application details for the individual. Pending Tab: The W-2 Agency will utilize this report to identify Emergency Assistance (EA) Applications with a Pending status beyond the deadline date for the current month. The report will provide a total count and break down the count by W-2 Agency and EA Worker, list the EA Worker Name, EA Request Number, EA Application Date, Status, EA Application Deadline Date, the EA Application Age, and limited EA Application details for the individual. Pending or In Progress Tab: The W-2 Agency will utilize this report to identify Emergency Assistance (EA) Applications with a Pending or In Progress status beyond the deadline date for the current month. The report will provide a total count and break down the count

by W-2 Agency and EA Worker, total count for each status, list the EA Worker Name, EA Request Number, EA Application Date, Status, EA Application Deadline Date, the EA Application Age, and limited EA Application details for the individual.

Notes

This report has three tabs. Information will return based on the region selected.

Employment Report 01(b): Employments

Location

Public Folders / DCF / WISDOM / Employment Programs / W-2 Case Management / Employment Reports

Use

This report includes information about participants' employments, including those with a closed and open status. Use the Export feature for the Employments-Exportable tab and sort by the Emp End Date column to assist with POP employment review.

W-2, JAL, EA ACCESS Report

Location

Public Folders/ DCF /WISDOM / Employment Programs /CWW ACCESS Reports

Use

This ACCESS Report assists staff when monitoring applications that will be moving from ACCESS to CWW and WWP. The report is used to track and ensure timely application processing

Notes

This report includes all Wisconsin Works (W-2), Job Access Loan (JAL), and Emergency Assistance (EA) applications submitted through ACCESS regardless of application processing status and eligibility status. This report will display applications with older application dates if the application still needs attention. It is best to use the export to Excel feature to allow you to sort for most recent applications.

BRCFWS-005 Aging Referrals Pending Assignment

Location

Public Folders / DCF / BRITS / 06.DCF W-2

Use

This report identifies referrals valid for W-2 waiting to be assigned to an Investigator.

Notes

Run the report timeframe 1/1/2018 to Today, Click New Group, Set Program Gatekeeper W-2 Contract Agency to your agency, Click Drill Filters, Set W-2 to Valid.

BFCFW2-002 Open Investigation Referrals - Detail

Location
Public Folders / DCF / BRITS / 06.DCF W-2
Use
This report identifies referrals in the middle of investigation.
Notes
Go to the Referrals Assigned by IAF Program Office - Detail tab, Click Drill Filters, Set W2 as Valid, Set IAF Program W-2 Contract Agency to your agency.

BRCFW2-007 Open Post Investigation Referrals by Program Gatekeeper Office - Detail

Location
Public Folders / DCF / BRITS / 06.DCF W-2
Use
This report identifies referrals with investigations that have been completed that are waiting to close out the referral from the gatekeeper (making claim determination etc.).
Notes
Click Drill Filters, Set PI Program Area Code to W-2, Set Program Gatekeeper W-2 Contract Agency to your agency.

The Department of Children and Families is an equal opportunity employer and service provider. If you have a disability and need to access services, receive information in an alternate format, or need information translated to another language, please call Division of Family and Economic Security at 608-535-3665. Individuals who are deaf, hard of hearing, deaf-blind or speech disabled can use the free Wisconsin Relay Service (WRS) – 711 to contact the department.