Managing Placements on the Web Redesign Project – New CWW Processes

The purpose of this guide is to describe systems changes to placement policy and processes for W-2 effective June 25, 2016. Refer to Operations Memos 16-07, 16-08, 16-09, 16-10, and 16-11 for details about the policy changes that motivated the systems changes explained in this guide. Operations Memo 16-13 provides an overview of systems changes not included in the aforementioned operations memos that are detailed in this guide. The CARES Worker Web (CWW) processes for those systems changes are explained in this guide.

This guide explains:

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

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Introduction

MPOWR is a CWW system enhancement that modernizes a set of case-based eligibility screens. These system changes moved case based eligibility, referral, and W-2 placement CARES Mainframe screen to existing or new CWW pages.

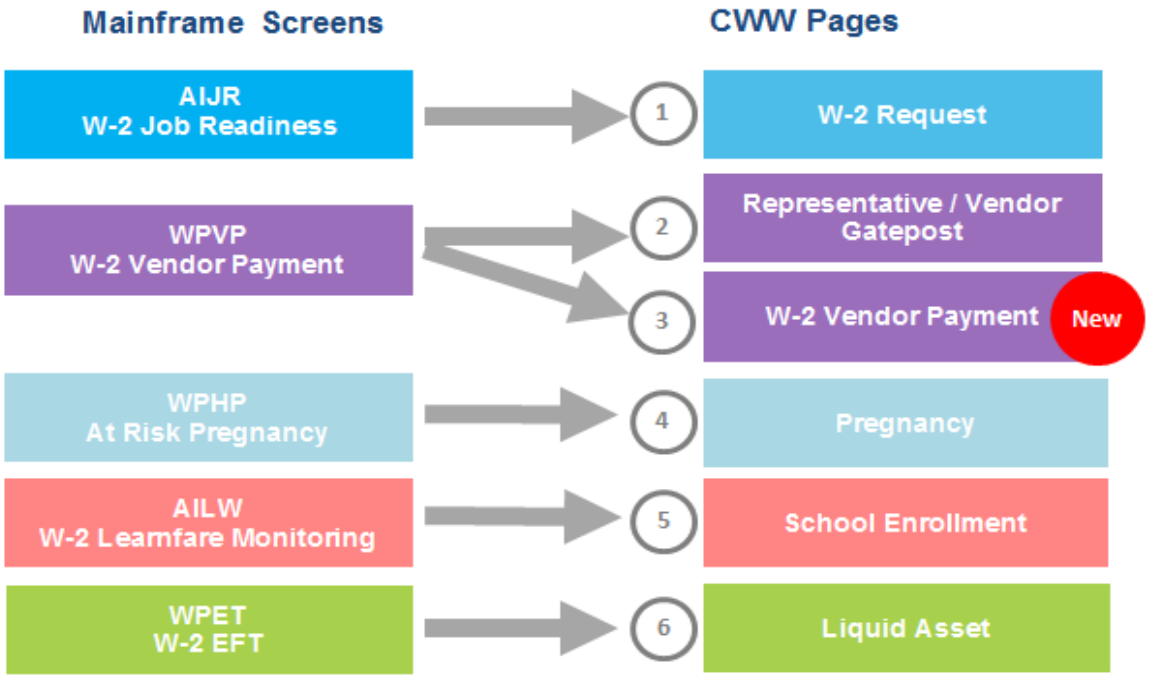
The following processes will move from CARES mainframe to CWW:

- W-2 Work Program Referrals (including Up-front requirements)
- Vendor Payments
- At Risk Pregnancy
- Learnfare Monitoring
- Electronic Funds Transfer (EFT)
- Placements
- Potential Payments
- Two Parent Participation
- Hold Payments
- Work Program Closure

Note: All CWW screen shots shown in this guide are mock-ups that were current at the time of this guide's writing. All information is up to date in CWW, effective June 25, 2016.

Case-Based Eligibility Pages

With the June 25 systems changes, the following case-based eligibility CARES WP mainframe screens move to the following CWW pages:



1 W-2 Request

CARES WP mainframe screen AIJR W-2 Job Readiness moves to the W-2 Request page in CWW.

Additions:

- **W-2 Work Program Referral for Assessment** section – used to refer W-2 applicants for assessment.

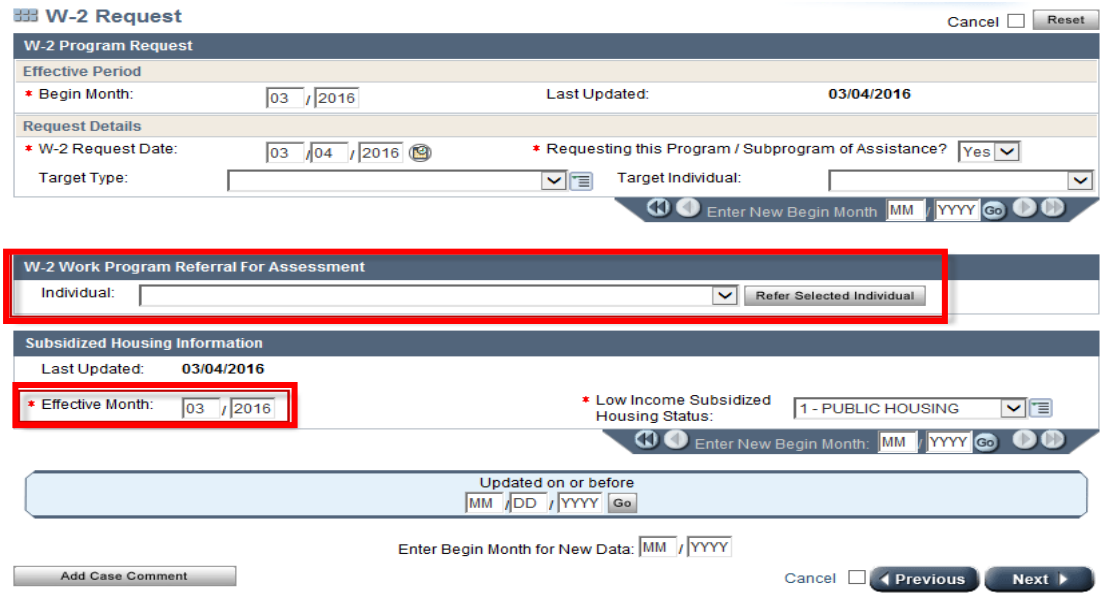
Changes:

- The **Subsidized Housing Information Effective Month** will auto populate with the Begin Month if the Enter Begin Month for New Date field is completed on the **Case Summary** page.

The **W-2 Work Program Referral for Assessment** section displays all individuals 18 years or older, including the primary person, in a dropdown box. Multiple individuals can be referred to work programs, but the FEP can refer only one individual at a time.

If the answer to the question, "Are there any up-front activity requirements?" on the **W-2 Up-Front Activity Requirements** page is YES, then the FEP **must** complete the W-2 Work Program Referral Assessment. FEPs will not be able to process eligibility if the referral is not completed. After the referral is complete, an informational message will display identifying the individual and PIN that was successfully referred and instruct FEPs to manually navigate to CARES screen WPEN to complete the enrollment and assessment process.

> **Note:** The informal assessment must be completed in CARES Mainframe prior to assigning up-front activities.



2 Representatives/W-2 Vendor Gatepost

CARES screen WPVP W-2 Vendor Payment screen has become two CWW pages, which moves the following functions to the existing CWW Representatives /W-2 Vendor Gatepost page.

Additions:

- **W-2 Vendor Payment** section – If the answer to the question, "Will your household have a W-2 vendor payment?" is Y- YES, then the W-2 Vendor Payment page is scheduled.

Changes:

- The name of the page has changed from Representative Gatepost to **Representatives/W-2 Vendor Gatepost**.

3 W-2 Vendor Payment

The new CWW W-2 Vendor Payment page collects vendor payment information for W-2 applicants or participants, formerly part of the CARES WPVP W-2 Vendor Payment screen.

Additions:

- **W-2 Vendor Payment** –This page collects vendor payment information for W-2 applicants or participants. If a vendor payment already exists, the vendor name, type, and vendor address information will auto populate after clicking on the vendor number.

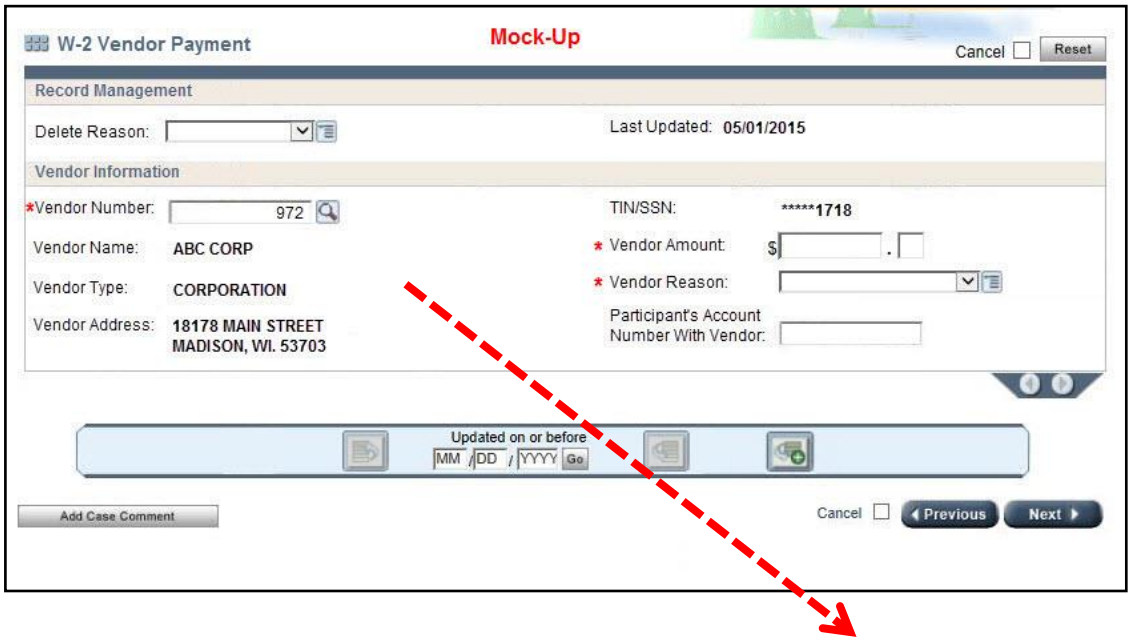
Changes:

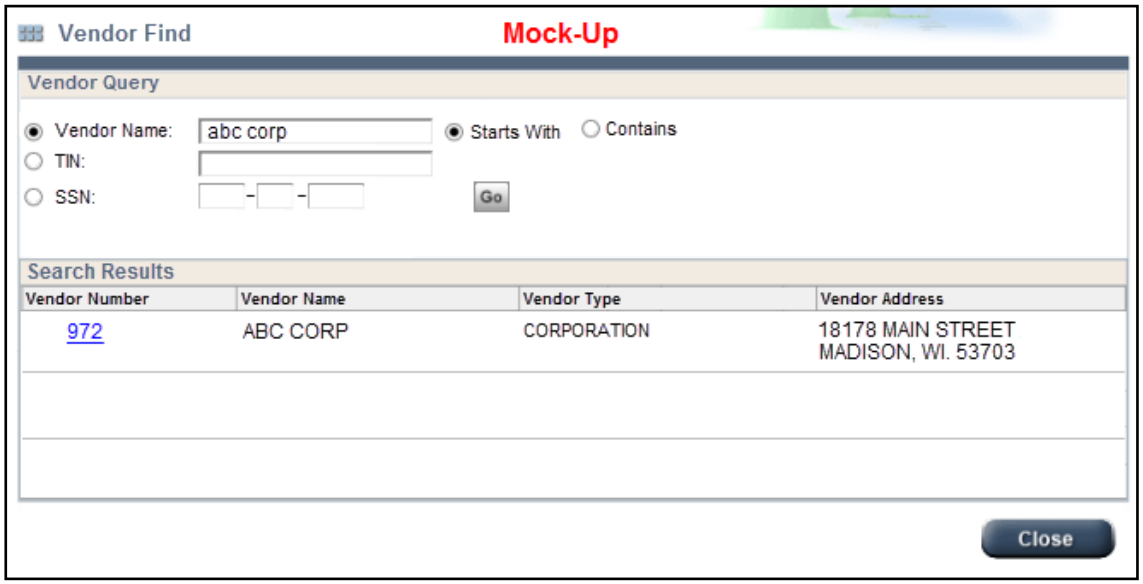
- Only one vendor payment can be entered on this page.
- A Vendor Number is required. FEPs can search for vendor numbers by clicking on the magnifying glass to open the Vendor Find Tool and entering the vendor name, Taxpayer Identification Number (TIN) or Social Security Number (SSN). Only one vendor payment at a time can exist on a case. Any previous vendor payment must be end dated to add or change the vendor payment.
- If a vendor is not found in the Vendor Find, then complete DOA-6448 - Taxpayer Identification Number (TIN) Verification Form. (http://dcf.wisconsin.gov/w2/callcenter/pdf/doa 6448.pdf)
- After completing the form, and reviewing IQVN, e-mail the form to dcfw2caresHD@wisconsin.gov to have the Vendor Find updated in order to complete the page.
  - The following are helpful tips to ensure your request will be processed promptly:
    - Make sure each section of the form is complete,
    - Make sure the information is legible,
    - Review the tax ID number to ensure it is the correct number of digits,
    - Make sure your contact information is recorded in the **For Agency Use Only** section.

> **Note:** Please follow your agency's process when submitting the completed DOA – 6648 form.

- To view historical information, enter a date in the Updated on or before field, and click Go.
- The Participant's Account Number with Vendor is required for Vendor Type UC- UTILITY CORPORATION or UN- UTILITY NON-CORPORATION.

> **Note:** Any current vendors entered in CARES Mainframe will display in CWW on June 25, 2016.


W-2 Vendor Payment
Mock-Up
Cancel
Reset
Record Management
Delete Reason:
Last Updated: 05/01/2015
Vendor Information
*Vendor Number: 972
Vendor Name: ABC CORP
Vendor Type: CORPORATION
Vendor Address: 18178 MAIN STREET MADISON, WI. 53703
TIN/SSN: *****1718
* Vendor Amount: $
* Vendor Reason:
Participant's Account Number With Vendor:
Updated on or before
MM / DD / YYYY Go
Add Case Comment
Cancel
Previous
Next


Vendor Find
Mock-Up
Vendor Query
Vendor Name: abc corp
Starts With
Contains
TIN:
SSN:
Go
Search Results
Vendor Number
Vendor Name
Vendor Type
Vendor Address
972
ABC CORP
CORPORATION
18178 MAIN STREET MADISON, WI. 53703
Close

4 Pregnancy

CARES screen WPHP At Risk Pregnancy functions move to the CWW Pregnancy page.

Additions:

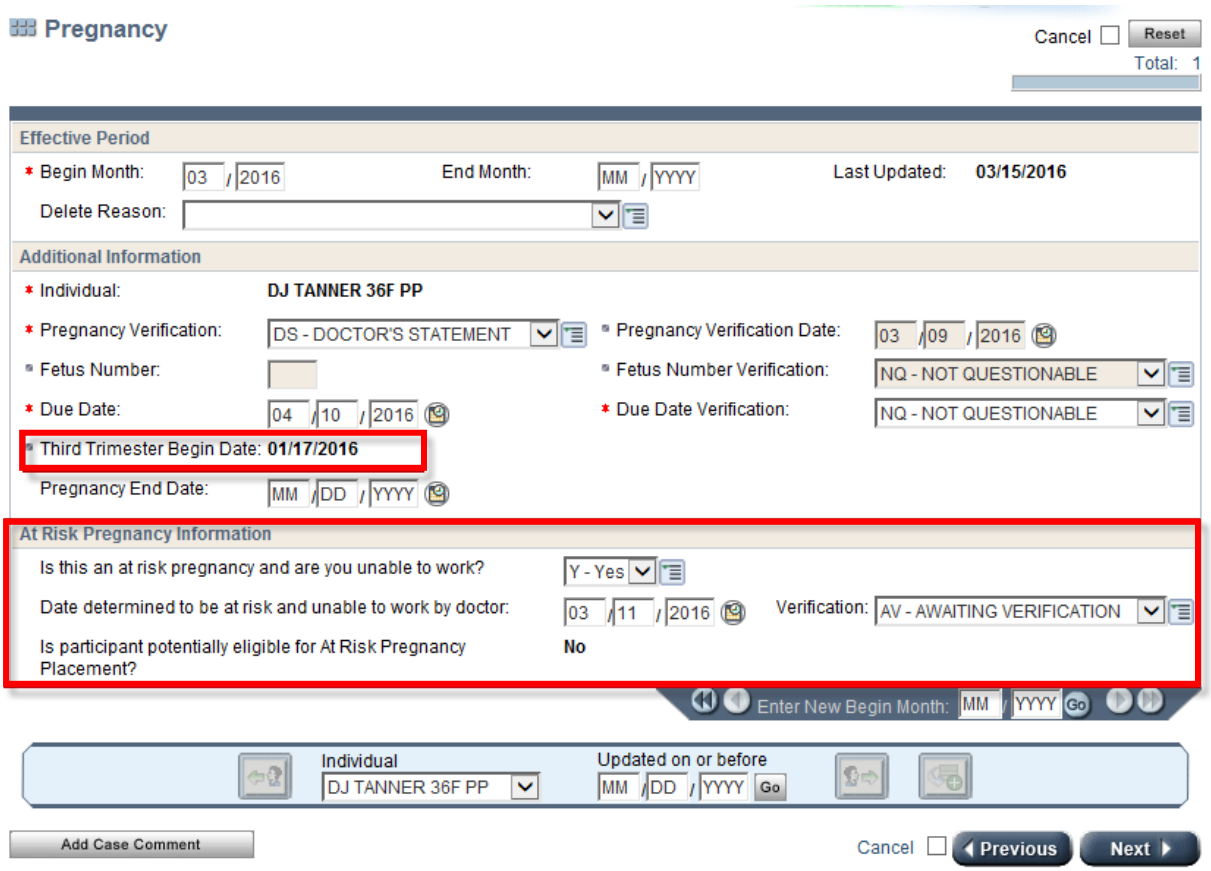
- **At Risk Pregnancy (ARP) Information** – This section collects information related to the ARP placement.
- **Third Trimester Begin Date** – This field automatically populates based on the date entered in the Due Date field.

The **At Risk Pregnancy Information** section collects all information to determine ARP eligibility.

- Is this an at risk pregnancy and are you unable to work? Both must be true for the response to be Y- YES.
- Date determined to be at risk and unable to work by doctor: This is a required field when Y- YES is the answer to the first question and verification must be provided. This date cannot be future dated.
- Is participant potentially eligible for At Risk Pregnancy Placement? This field is auto-populated based on the responses to the first two questions and if currently in the third trimester.
- DCF-F-4070-E At Risk Pregnancy (ARP) Medical Information/Verification form is not changing.

FEPs are able to future date ARP placement from a CMP placement within 10 calendar days of the third trimester and all other eligibility requirements are met.

Note: The date determined to be at risk and unable to work by doctor cannot be more than 30 days prior to the Third Trimester Begin Date.



Verification options remain the same as they were on CARES mainframe WPHP.

> **Note:** See W-2 Manual 7.4.6 At Risk Pregnancy (ARP) for policy regarding At Risk Pregnancy requirements.

5 School Enrollment

CARES screen AILW W-2 Learnfare Monitoring moves to the CWW School Enrollment page.

Additions:

- **School Enrollment** – The W-2 Learnfare Monitoring section collects information for Learnfare Status and Penalty Code.

Learnfare referral is completed on the new **Work Programs Referral/Action** page in the Learnfare Referral Information section. The Action needed on that page is based on the information entered on this page.

Learnfare Details

The Learnfare Status fields are enterable only when:

- The child's high school graduation status is NOT- NOT GRADUATED;
- The page is accessed by a FEP or FEP supervisor;
- The child's age is greater than or equal to age 6 and less than age 18; and
- W-2 is requested on the case.

  - **NOTE:** Excluded Child in the household will also require a Learnfare status. You may enter WST with the verification OW-OTHER ACCEPTABLE WRITTEN STATEMENT.

- A new status code has been created: WSP - SCHOOL RELATED PROBLEMS THAT IMPACT PARENTAL W-2 PARTICIPANT. (See Operations Memo 16-09)

- A penalty code is only available when the individual is not enrolled and this field records when the individual also fails to comply with case management.

- WNE – NOT ENROLLED is the only Learnfare status that will allow a penalty code to be entered.

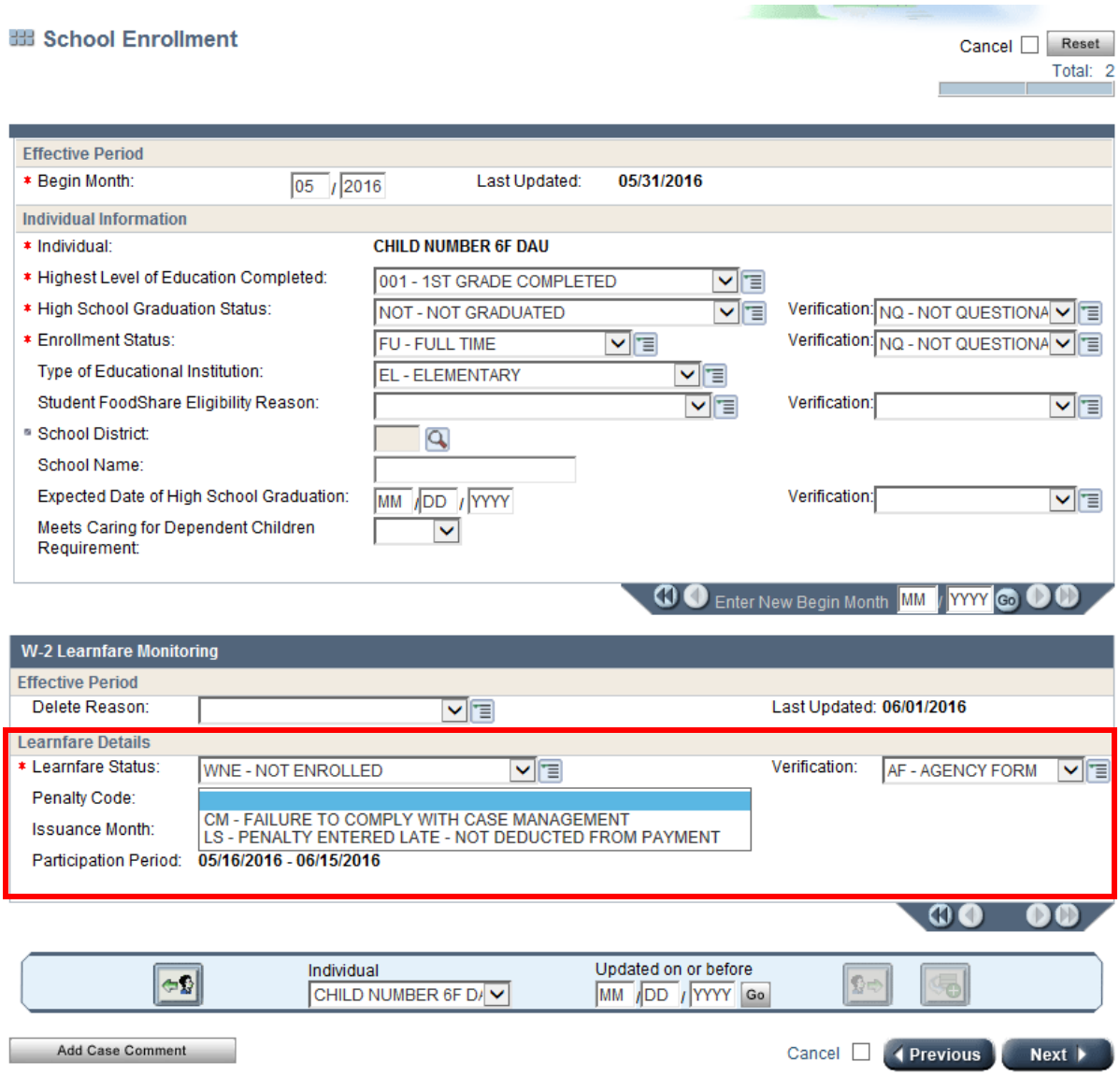
When a FEP completes a W-2 review, the penalty code will be cleared and must be verified again if it is applicable.

This Issuance Month will be a read-only field to indicate when benefits are issued for the participation period that is displayed. It is system-calculated any time a FEP accesses this page and this section is enterable. If the current date is before the 16th of the month, the Issuance Month will be set as the next month. If the current date is on or after the 16th of the month, the Issuance Month will be set as the recurring month.

The Participation Period field will be a read-only field to indicate the dates for which the information entered is applicable. It is system-calculated any time a FEP accesses this page and this section is enterable. If the current date is before the 16th of the month, the

Participation Period Begin Date is the 16th of the prior month and the Participation Period End Date is the 15th of the current month. If the current date is on or after the 16th of the month, the Participation Period Begin will be the 15th of the following month.

If the FEP needs to delete the Learnfare information, a delete reason must be selected.



6 Liquid Assets

CARES screen WPET W-2 EFT moves to the CWW Liquid Asset page. Prepaid debit cards can be added to the **Liquid Asset** page and will count as an asset when determining eligibility.

Additions:

- **W-2 EFT Information** – This section identifies whether an asset should be used to receive W-2 EFT. Allowable asset types for EFT include checking accounts, savings accounts, and/or prepaid debit cards.
- **Entering EFT Information** - If the W-2 participant wants his or her W-2 payment check electronically deposited into his or her bank account or prepaid debit card, the FEP must enter the account information in the W-2 EFT Information section. FEPs and FEP supervisors are the only staff who will be allowed to enter information into the EFT field.

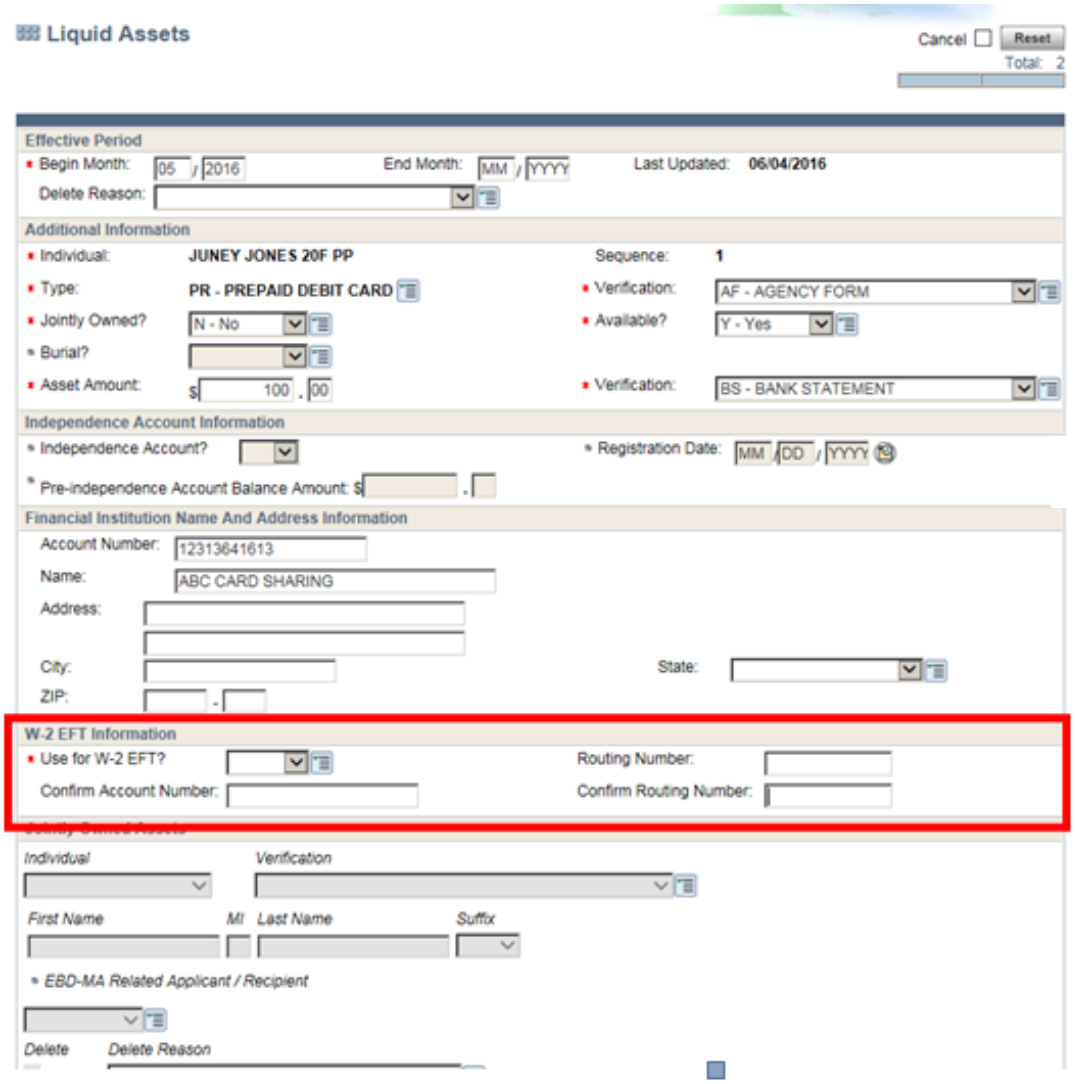
Changes:

- **Account Number** – This field is required for savings account, checking account and prepaid debit card under the Financial Institution Name and Address Information section.
    - **NOTE:** If the asset is pending verification and you do not yet have the account number, enter zeros as a temporary placeholder and then update the account number when the verification is received.

- **Financial Institution Name** - This field is required for savings account, checking account and prepaid debit cards under the Financial Institution Name and Address Information section.
- **Deleting Assets** - FEPs and Income Maintenance (IM) workers will not be able to delete an asset if the asset is used for W-2 EFT. FEPs need to zero out and end date the asset if it needs to be eliminated prior to changing the Use for W-2 EFT question to N- NO.

If an asset is selected to use for EFT, all other assets will default to N- NO.

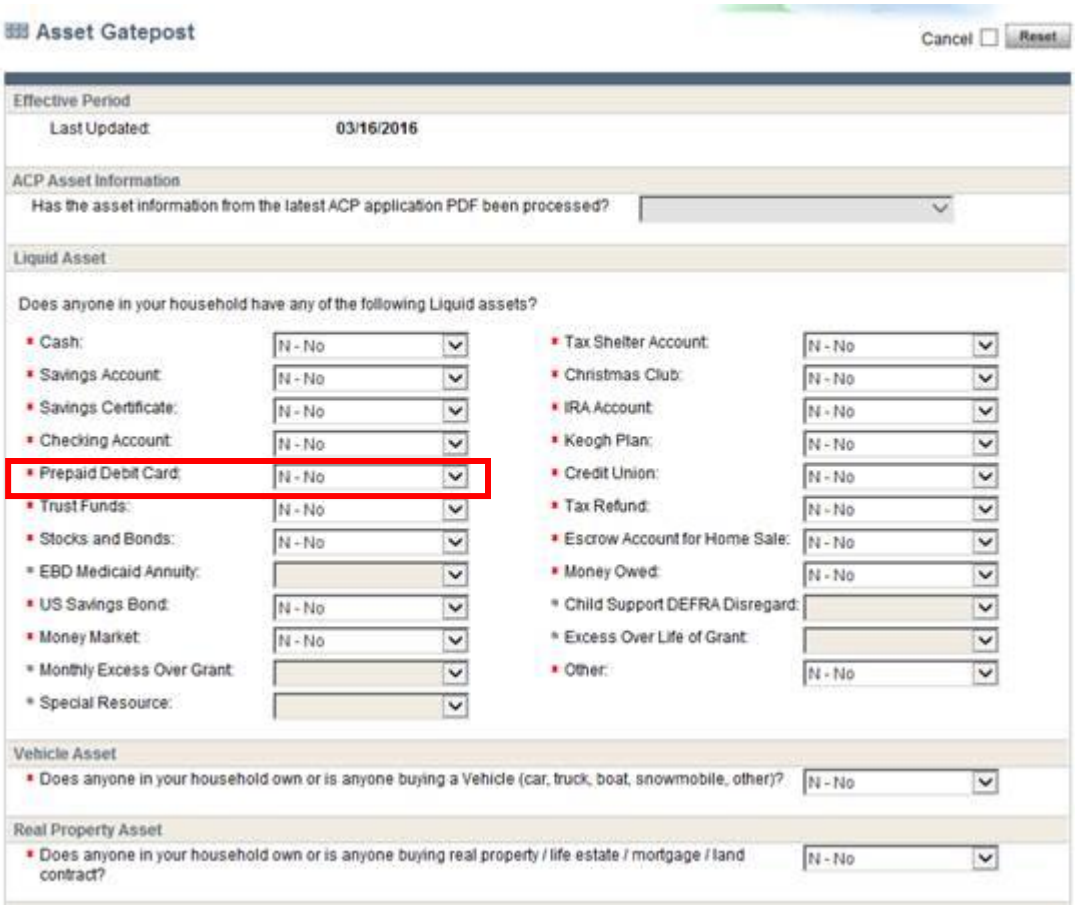
Note: When a case is closed for at least 60 days, the EFT information will be automatically removed.


Liquid Assets
Cancel
Reset
Total: 2
Effective Period
Begin Month: 05 / 2016
End Month: MM / YYYY
Last Updated: 06/04/2016
Delete Reason:
Additional Information
Individual: JUNEY JONES 20F PP
Sequence: 1
Type: PR - PREPAID DEBIT CARD
Verification: AF - AGENCY FORM
Jointly Owned? N - No
Available? Y - Yes
Burial?
Asset Amount: $ 100 . 00
Verification: BS - BANK STATEMENT
Independence Account Information
Independence Account?
Registration Date: MM / DD / YYYY
Pre-independence Account Balance Amount: $
Financial Institution Name And Address Information
Account Number: 12313641613
Name: ABC CARD SHARING
Address:
City:
State:
ZIP:
W-2 EFT Information
Use for W-2 EFT?
Routing Number:
Confirm Account Number:
Confirm Routing Number:
Individual
Verification
First Name
MI
Last Name
Suffix
EBD-MA Related Applicant / Recipient
Delete
Delete Reason

Asset Gatepost

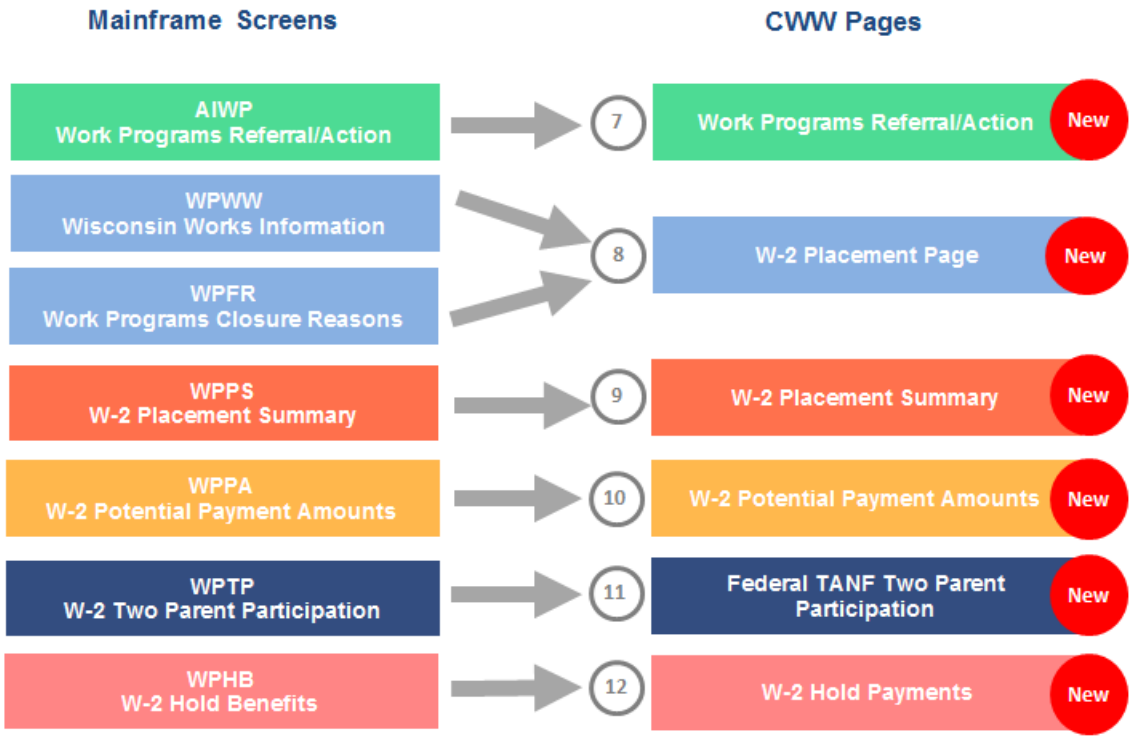
Additions:

- **Prepaid Debit Card** – A prepaid debit card is different from a bank debit card. A bank debit card is linked to a person's bank account. A prepaid debit card has funds loaded in advance to the card in order for the person to use the funds. A prepaid debit card may be an option for banking for some W-2 applicants or participants. Prepaid Debit Cards will be counted as an asset when determining W-2 eligibility. (See Operations Memo 16-07)



Referral and W-2 Placement Pages

The following referral and W-2 placement related CARES WP mainframe screens move to new CWW pages to streamline case processing on June 25, 2016:



7 Work Programs Referral/Action

CARES screen AIWP Work Programs Referral/Action functions move to the new CWW Work Programs Referral/Action page.

Additions:

- **Work Programs Referral/Action** – This page allows referrals to Work Programs and Learnfare.

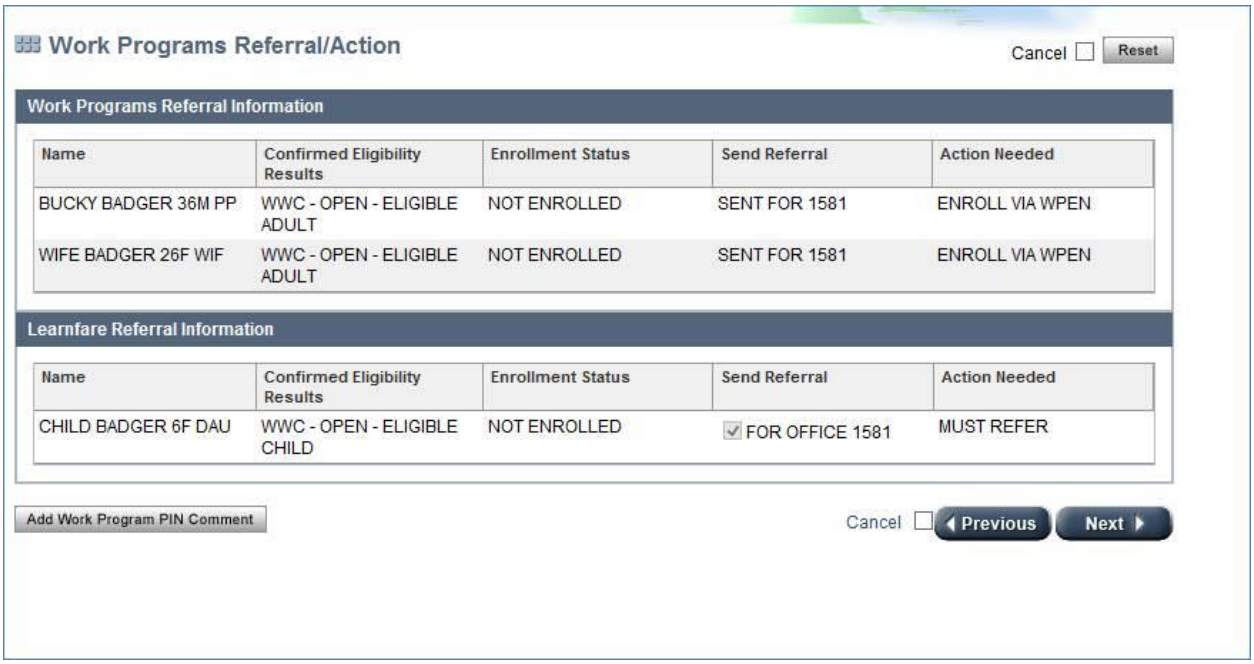
The **Work Program Referral Information** section lists all W-2 participants who have all have the following:

- A confirmed W-2 Participation Status of Eligible Adult, or
- A confirmed W-2 Participation Status of Primary Person who has an Eligible Child in W-2 Minor Parent (WWM).

The **Learnfare Referral Information** section lists all children who have:

- A confirmed W-2 Participation Status of "Eligible Child" ages 6-17;
- A Learnfare Status that is <u>not</u> WST – STUDENT IN GOOD STANDING;
- A High School Graduation Status that is NOT-NOT GRADUATED; and
- A parent in a paid placement.

Children that do not meet all of these criteria are listed as E-EXEMPT.



The **Confirmed Eligibility Result** column displays the currently confirmed W-2 assistance group and subprogram code with the Participation Status of each individual.

The **Enrollment Status** column indicates whether the individual is currently enrolled in Work Programs, and, if so, the office in which he or she is enrolled.

The **Send Referral** column displays information or actions related to the referral of the W-2 applicant or participant.
Valid values are:

- FOR OFFICE [Office #] – The checkbox displays when the individual is not referred to or enrolled in the Work Programs office where he or she resides.
  - Exception – Cases within Milwaukee are not referred from one agency to another when the case is already enrolled in a Milwaukee agency and the W-2 applicant or participant is not enrolled anywhere else. The Send Referral column will always be blank if the case is in Milwaukee and the W-2 applicant or participant is already enrolled in a Milwaukee agency. Transfer the W-2 participant on WPWI.
- SENT FOR OFFICE [Office #]
  - The information displays when a referral has been made for a Work Programs office in which the case resides and the W-2 applicant or participant is not already enrolled somewhere else.
  - If a referral has been made, but it is not for the office in which the case resides, it will not be shown.

- PENDING FOR OFFICE [Office #]
  - The information displays when a referral has been made for a Work Programs office in which the case resides but the W-2 applicant or participant is already enrolled elsewhere.
  - If a referral has been made, but it is not for the office in which the case resides, it will not be shown. Example: Case was open in Dodge County and a referral was made to the W-2 agency in Dodge County, but then the participant moves to Milwaukee and opens for W-2.
- Blank – This column is blank when the W-2 participant is already enrolled in the office in which his or her case resides.

W-2 applicants and participants **must** be referred to Work Programs, and this page **must** be completed if the checkboxes are protected. When a W-2 applicant or participant is correctly enrolled in Work Programs, then the page will display as blank.

The **Action Needed** column displays informational messages about the W-2 applicant or participant.

Values include:

- MUST REFER – Displays when the checkbox is pre-checked and protected. Clicking on the Next button will process the referral.
- TRANSFER TO [OFFICE #] via WPWI – Displays when:
  - The case has moved within a W-2 contract agency, but the WP case needs to be transferred via WPWI.

  - The case has moved from one Milwaukee agency to another, and the WP case needs to be transferred via WPWI.
- DISENROLL FROM [OFFICE #] – Displays when a case has moved from one W-2 contract agency to another and the W-2 participant is still enrolled in the old office.
  - Exception – In Milwaukee, the case will be transferred.
- ENROLL VIA WPEN – Displays when the Work Programs System Status is R-REFERRED or S-SCHEDULED in the appropriate office and the W-2 applicant or participant needs to be enrolled.

The Add Work Program PIN Comment button allows the FEP to add a comment related to the referral directly from this page. The Add Work Program PIN Comment function will bring up a comment box to enter in comments, and then the FEP will be able to navigate to CARES Mainframe CMCC to view the comments.

W-2 Manual 4.6.2 Transfer Between W-2 Agencies in Milwaukee County: When Milwaukee W-2 agency initiates a case transfer; it must use the Inter-Regional W-2 Participant Transfer Notice form. For more detailed information on the Milwaukee transfer process, FEPs must refer to the 2013 Inter-Regional Transfer Procedure for Milwaukee W-2 Agencies.

Transfer Office Scenario

Scenario 1: Misty currently resides in Milwaukee County. On 5/4/16, Misty informs her FEP that she is moving on 5/5/16 to Dane County. The FEP closes Misty's case on 5/4/16 so that Misty can apply for services in Dane County when she moves on 5/5/16.

Scenario 2: Mai resides in Milwaukee County and her W-2 office is Ross. Mai is relocating to the eastside of Milwaukee where America Works is her new W-2 office. Mai informs her FEP at Ross that she is moving. The FEP at Ross updates WPWI with the new FEP information and office number to reflect America Works.

Confirm Eligibility

Additions:

- The **Confirm Eligibility** page allows FEPs to confirm eligibility results.
- When eligibility is confirmed, the **Work Programs Referral/Action** page will be scheduled if:
  - A newly opened W-2 AG is confirmed, and/or
  - A new potential Learnfare child is present in the W-2 AG that is confirmed and opened.

8 W-2 Placement

CARES screens WPWW Wisconsin Works Information and WPFR Work Program Closure Reasons move to the new CWW W-2 Placement page. This new CWW page implements changes to CMF placement and eligibility policy. Additional functionality enhancements on this page include:

a. The automatic closure of Custodial Parent of an Infant (CMC) placements on the 56th day of placement;
b. The automatic closure of all other placements on the last day of the month that eligibility was open; and
c. Supporting future begin dating and end dating of placements.

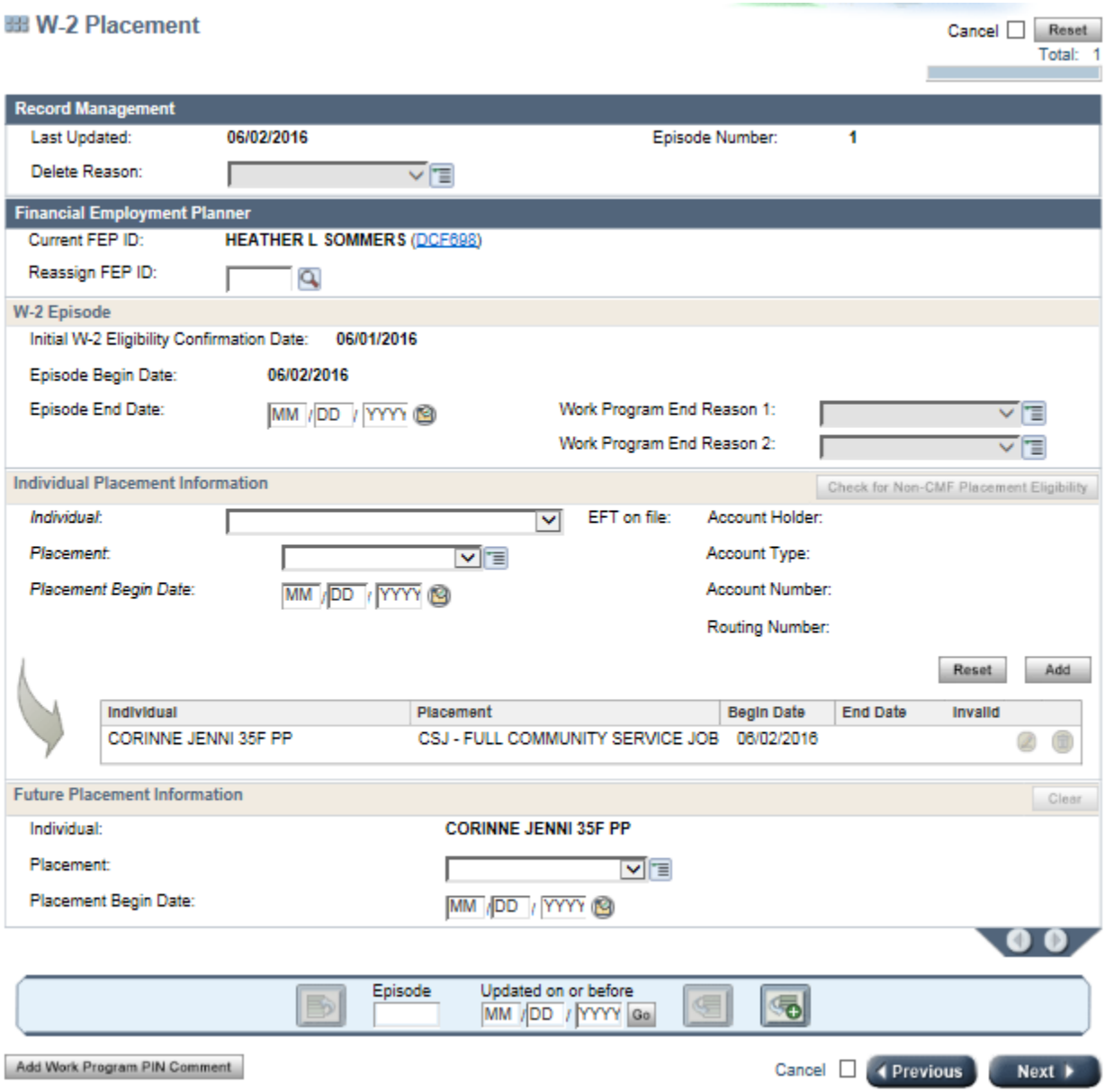
Additions:

- **W-2 Placement** – This page allows FEPs to enter placement for W-2 participants that have been confirmed open for W-2.
- The assigned FEP can be updated on this page by entering a new FEP ID in the **Reassign FEP ID** field.
- **The Add Work Program PIN Comment** button allows the FEP to add a comment directly from this page. The **Add Work Program PIN Comment** function will bring up a comment box to enter in comments, and then the FEP will be able to navigate to CARES Mainframe CMCC to view the comments.

Changes:

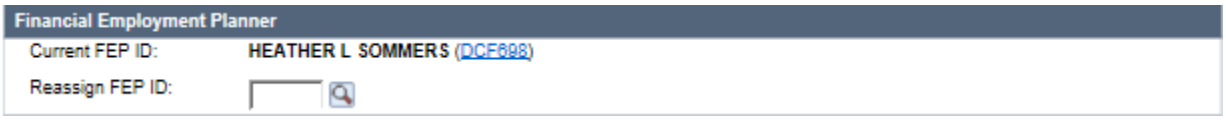
- The **Work Program End Reasons** from **Reference Table TWFR** have been updated to reflect those end reasons only relevant to a work program reason.
- New transaction types for WPTN – will show when a W-2 placement begins, ends, or is changed.
- Employment Verification form is not required to change a placement. A FEP can accept verbal information from the participant. (See Operations Memo 16-08)
- Auto Closing Placements – some placements will automatically close at certain time frames:
  - CMF – 12 months
  - CMC – 56 days from date of child's birth
  - TMP/TNP – 9 months
  - TSP – 17 weeks

Note: A W-2 placement cannot be made until the Eligible Adult has been referred to Work Programs.


W-2 Placement
Cancel
Reset
Total: 1
Record Management
Last Updated: 06/02/2016
Episode Number: 1
Delete Reason:
Financial Employment Planner
Current FEP ID: HEATHER L SOMMERS (DCF698)
Reassign FEP ID:
W-2 Episode
Initial W-2 Eligibility Confirmation Date: 06/01/2016
Episode Begin Date: 06/02/2016
Episode End Date: MM / DD / YYYY
Work Program End Reason 1:
Work Program End Reason 2:
Individual Placement Information
Check for Non-CMF Placement Eligibility
Individual:
EFT on file:
Account Holder:
Placement:
Account Type:
Placement Begin Date: MM / DD / YYYY
Account Number:
Routing Number:
Reset
Add
Individual
Placement
Begin Date
End Date
Invalid
CORINNE JENNI 35F PP
CSJ - FULL COMMUNITY SERVICE JOB
06/02/2016
Future Placement Information
Clear
Individual: CORINNE JENNI 35F PP
Placement:
Placement Begin Date: MM / DD / YYYY
Episode
Updated on or before
MM / DD / YYYY
Go
Add Work Program PIN Comment
Cancel
Previous
Next

Notes regarding the FEP ID:

- When creating a new episode, the **Current FEP ID** field is automatically populated with the FEP on the **W-2 Up-Front Activities** page, and may be reassigned as appropriate.
- When updated, the new FEP ID will update and display on this page and on the **W-2 Up-Front Activities** page.

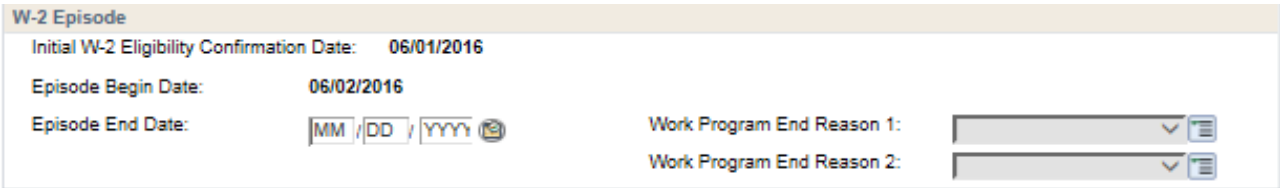


Notes regarding W-2 episodes:

- The **W-2 Placement** page will load with the most recent non end-dated or deleted W-2 episode for the case.
- Only the W-2 Help Desk can delete the W-2 episode.

> **Best Practice:** A W-2 episode consists of all placements from the date the case opened through the date the case closed (eligibility has ended). Do not enter an Episode End Date until the case is closing and the participant is no longer receiving W-2 services.

- If an episode is saved with an **Episode End Date** that is not a future date or a current date, the episode becomes query only.
- The **Work Program End Reason(s)** will remain editable until the W-2 case is confirmed closed. A **Work Program End Reason** is not required for an eligibility closure.
- The Episode Number is determined as the highest **Episode Number** for the case (including deleted episode) + 1.
- Prior episodes are accessed through the Record Navigator (the icon that looks like a clock).
- If re-requesting W-2 and the **W-2 Episode** is open, the FEP will be able to change the W-2 Request from N- NO to Y-YES on the **W-2 Request** page if there is a current **W-2 Episode**.
- The **Initial W-2 Eligibility Confirmation Date** is defaulted to the **Initial W-2 Eligibility Begin Date** of the current W-2 sequence.
- When a W-2 case is confirmed closed for Work Program related reasons, the FEP must enter an **Episode End Date** and **Work Program End Reason**.
- If a case is confirmed closed for financial or non-financial reasons and the FEP fails to enter and Episode End Date, a monthly batch process will automatically end the Episode on the last day of the month eligibility is open.



Case Closure Flow

Eligibility Closure

1. Update CWW with the updated eligibility information
2. Run eligibility
3. Confirm closure
4. Go to the Placement page and enter an Episode End Date—may be any date up to the last day eligibility is open.

Work Program Closure

1. Go to the Placement page and enter an Episode End Date (current date will only be accepted) and Work Program End Reason Code (if there are more than two Work Program reasons, use the most appropriate closure reasons).
2. Run eligibility
3. Confirm closure

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

If the review is not completed by the last day of the review month, the W-2 case is closed. If the participant requests W-2, a new program request/W-2 application would need to be initiated. The FEP must not use the “Reactive Case” functionality.

Individual Placement Information

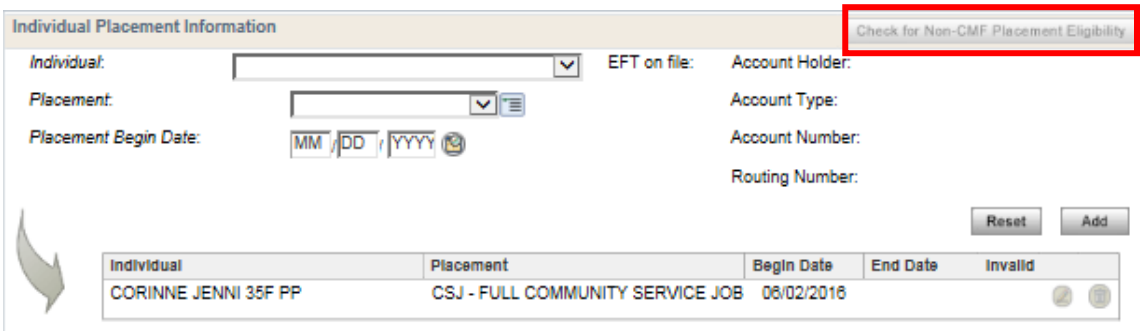
The **Individual** field lists only W-2 participants who are eligible to be placed in a W-2 employment position. If an individual is in a W-2 placement and has moved out of the household or left the case, a warning message notifies the FEP to change the placed individual.

> **Note:** If an individual is determined eligible for W-2, the W-2 agency must not delay placing the W-2 participant.

Placement options, in the drop-down menu, include only those placement types for which a W-2 participant is eligible based on the Target Type. If the income and assets determination was overridden (only target type WWC can use the override function) in eligibility determination, the CMF placement is the only option.

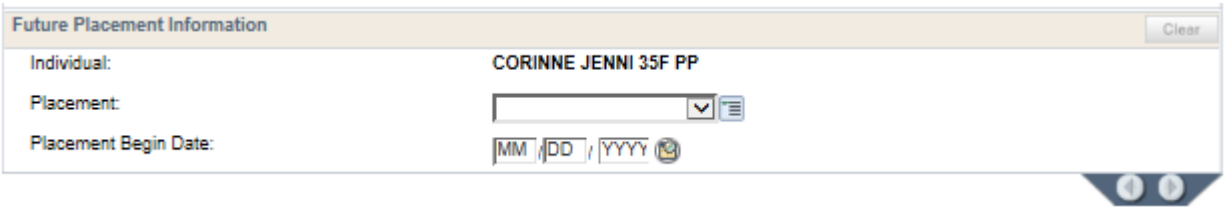
Target Type	Placement
Non-Custodial Parent (WWN)	CMN, TNP, TSP
Minor Parent (WWM)	CMM
Pregnant Women (WWP)	ARP, CMP
Custodial Parent (WWC)	CMC, W2T, CSJ, CS1, CS2, CS3, CMU, CMD, CMF, CMJ, TMP
Non-Custodial Job Access Loan (WWL)	No placement allowed
Job Access Loan (WWJ)	No placement allowed

The **Check for Non-CMF Placement Eligibility** button is enabled only when any of the current or future month(s) eligibility was overridden for CMF purposes. Clicking this button will disregard the current 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.



Future and Back Dating

On the **W-2 Placement** page, FEPs will be able to future date and back date the placement begin date for a maximum of 10 calendar days from the current date. When a future placement and begin date is entered in the **Future Placement Information** section, a batch process in CWW will run every night to change the placement and begin date. If a FEP receives an error that the future placement did not take place, he or she should review to ensure the correct placement was entered, and update the **W-2 Placement** page with the correct placement and begin date. If a W-2 participant will no longer meet financial or non-financial eligibility for W-2, a future W-2 Episode End Date can be entered in advance up to the last day of the month eligibility is open. (See Operations Memo 16-11)



Example: Brad has been in a CSJ placement for 3 months. Brad's FEP found out that he has been working full time for the past 7 days starting on 5/17. On 5/24, the FEP contacts Brad to obtain the employment information. The FEP updates the Employment page in CWW with the verbal employment information from Brad and pends the verification if none was received. The FEP runs eligibility checking Ignore W-2 income and asset tests to allow the CMF placement to begin, confirms eligibility, then changes Brad's placement to a CMF effective 5/17. The FEP enters comments from the W-2 Placement page using the Add Work Program PIN comments justifying the placement decision. Brad's FEP also completes an informal assessment in Work Programs, updates the Employment information on WPEH, his Employability Plan on WPAS and the activity codes on WPCH. This may be completed via telephone if Brad is unable to come in person due to his work schedule.

Future placements can be entered based on the W-2 participant's current W-2 Target Type.

The FEP will not be allowed to enter an Episode End Date if the Episode End Date was entered prior to confirming the closure.

If a W-2 participant is in a CMC placement, the FEP can enter a future placement and begin date for a maximum of 10 days prior to the 56th day. The system will automatically update the Placement Information set by the FEP. If no future information is entered, the system will automatically end the CMC placement on the 56th day from the birth of the child.

If a future placement was entered incorrectly, click the **Clear** button to remove the future placement information if appropriate, and then the correct future placement information can be entered.

Future Dating Placement Scenarios

Scenario 1: Shannon is currently in a CMC placement, which will end on June 6. Shannon attends her Employability Plan review appointment on May 30 with her FEP. Because Shannon does not have a job to return to, she would like to remain in the W-2 program. After completing an informal assessment, the FEP determines that Shannon is appropriate for a CSJ placement. The FEP completes the Future Placement Information section on the **W-2 Placement** page showing a CSJ placements and Placement Begin Date as June 7. The system will automatically end Shannon's CMC placement June 6 and begin her CSJ placement June 7. The FEP goes to CARES mainframe and updates Shannon's Employability Plan on WPAS and activity codes on WPCH.

Scenario 2: Alexis is currently in a W-2 T placement. On July 10, she provides her FEP with an Employment Verification Form from ABC Grocery Store showing that she will be working 35 hours per week at $9.00 per hour starting on July 13. The FEP enters the employment information on the **Employment** page, and through the driver flow, will Initiate Eligibility by clicking on the box to ignore assets and income tests to allow CMF placement to begin, and Confirm Eligibility. The FEP will enter the Future Placement Information section on the **W-2 Placement** page showing that Alexis's placement will be CMF beginning on July 13. The FEP goes to CARES mainframe to update Alexis's Employability Plan on WPAS and activity codes on WPCH.

Scenario 3: Rob is currently in a CMF placement and is meeting with his FEP due to recently losing his job. Rob provides his FEP with an Employment Verification form showing that he lost his job four days ago. The FEP completes an informal assessment and determines that a CSJ placement is the most appropriate placement. The FEP enters the updated information on the **Employment** page, Initiates Eligibility and then Confirm Eligibility. The FEP will need to click on the Check for Non CMF Eligibility tab on the **W-2 Placement** page to allow the FEP to enter the new placement information showing that Rob is in a CSJ placement with today as the begin date. After the placement information is entered, the FEP will need to Initiate Eligibility again, and then Confirm Eligibility. The FEP also updates WPEL with the updated employment information, updates his Employability Plan on WPAS and activity codes on WPCH.

Initiate Eligibility

Additions:

- **Ignore W-2 income and asset tests to allow CMF Placement to begin** – Checking this checkbox allows CWW to run eligibility while ignoring income and assets.

CWW has been modified to apply CMF policy when initiating eligibility. A W-2 participant in a CMF placement remains eligible if income and assets are over the W-2 limits.

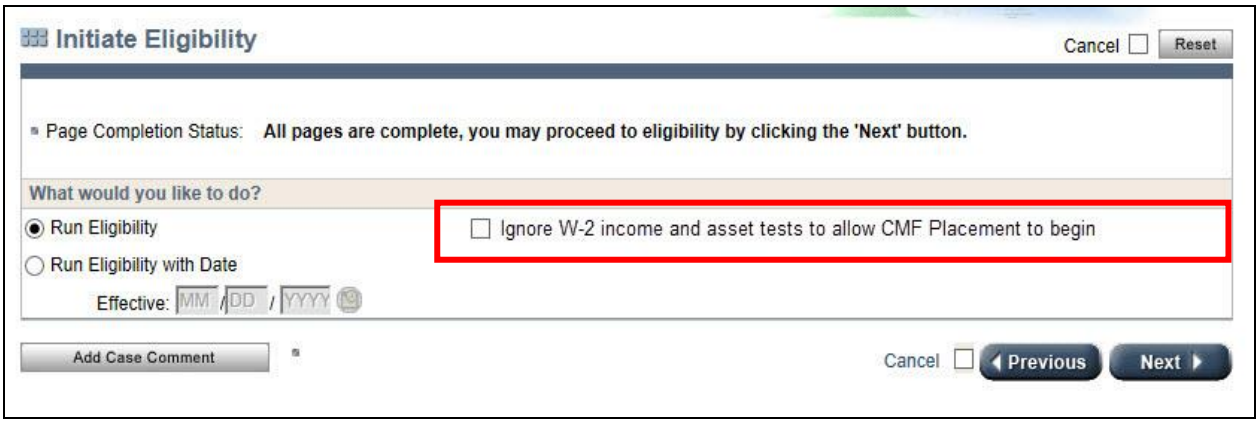
Additional Notes:

- If the case is passing financial eligibility, both the income and asset tests, and the FEP clicks the Ignore W-2 income and asset tests to allow CMF Placement to begin box, the override is not applied.
- The override is applied only to the current and future month of eligibility. If eligibility is run for a prior month (running with dates), the override will never be applied.

CMF Placement Flow

When a W-2 participant reports new employment, the FEP must enter the new information on the **Employment** page and then will follow the flow below:

1. Use the **Initiate Eligibility** page; select the “Ignore W-2 income and asset tests to allow CMF Placement to begin” box.
2. Run and confirm eligibility.
3. Continue through the driver flow to the W-2 Budget page. The W-2 participant will fail the income test, but will show the income/asset test was skipped.
4. On the W-2 Placement page, change the placement to CMF.



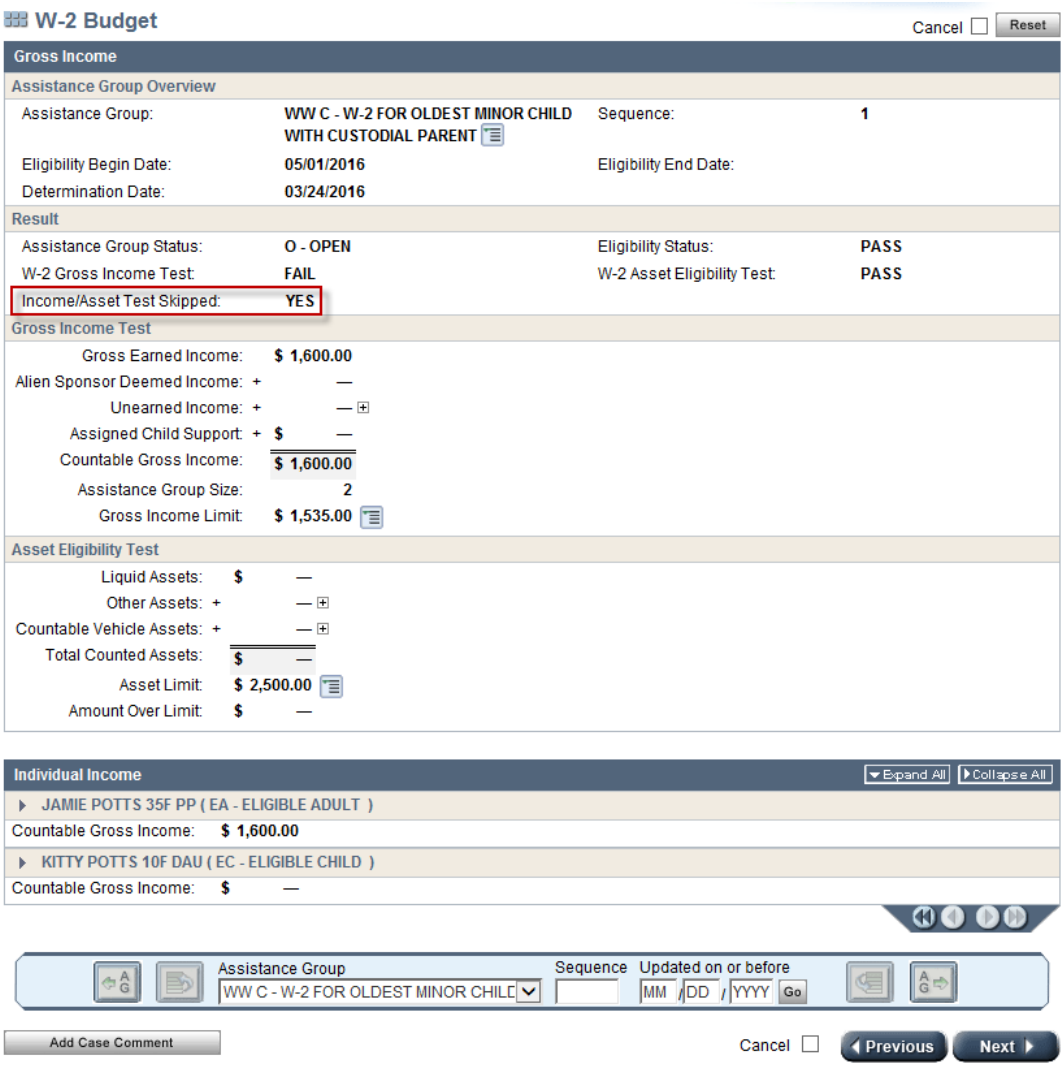
W-2 Budget

Additions:

- **Income/Asset Test Skipped** – This field displays with a YES when income and assets were disregarded in the eligibility determination process.

If the case is passing eligibility and the FEP clicks the “Ignore W-2 income and asset tests to allow CMF Placement to begin” box on the **Initiate Eligibility** page, the override will not be applied. In this instance, the **Income/Asset Test Skipped** will be set to NO, even if the FEP checked the “Ignore W-2 income and asset tests to allow CMF Placement to begin” box on the **Initiate Eligibility** page.

A case will fail if a W-2 participant is in a CMF placement and the case pends or does not meet non-financial eligibility requirements.



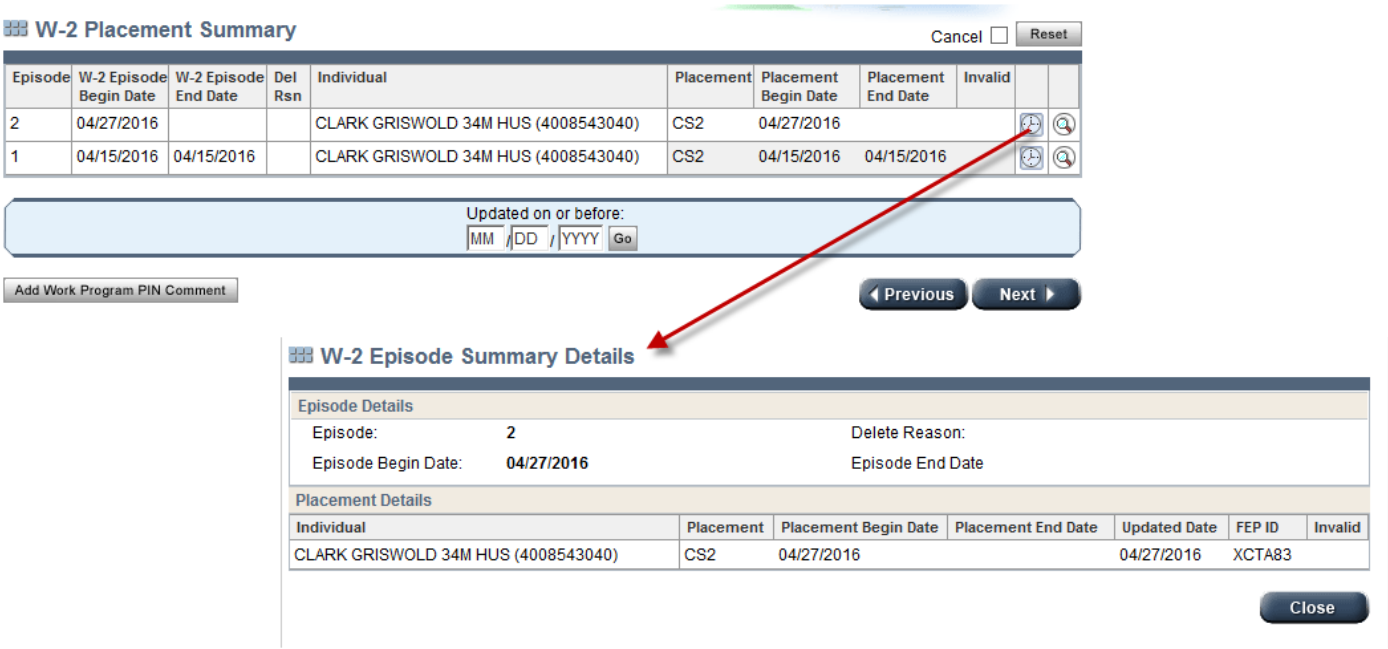
9 W-2 Placement Summary

CARES screen WPPS Placement Summary moves to the new CWW W-2 Placement Summary page.

Additions:

- **W-2 Placement Summary** – After saving the placement information, the **W-2 Placement Summary** page displays.
- The **W-2 Placement Summary** page shows the **Episode**, **W-2 Episode Begin Date** and **W-2 Episode End Date**, **Individual**, and **Placement**, **Placement Begin Date** and **Placement End Date** as well as whether the placement was **Invalid**. FEPs can click on the clock to view the **W-2 Episode Summary Details** page, which will show all of the Placement changes in a specific Episode. All fields on this page are read only.

W-2 placements may be future end dated or changed within 10 days of the current date.

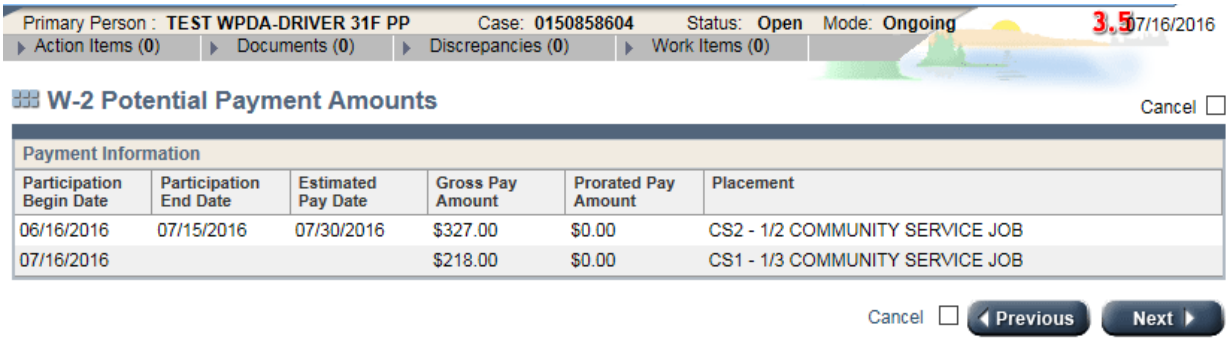


10 W-2 Potential Payment Amounts

CARES screen WPPA W-2 Potential Payment Amounts moves to the new CWW W-2 Potential Payment Amounts page.

Additions:

- **W-2 Potential Payment Amounts** – This page displays W-2 potential payment amounts that are calculated but not issued.
- Estimated pay date and pro-rated potential pay amount will be added to the notice.



11 Federal TANF Two Parent Participation

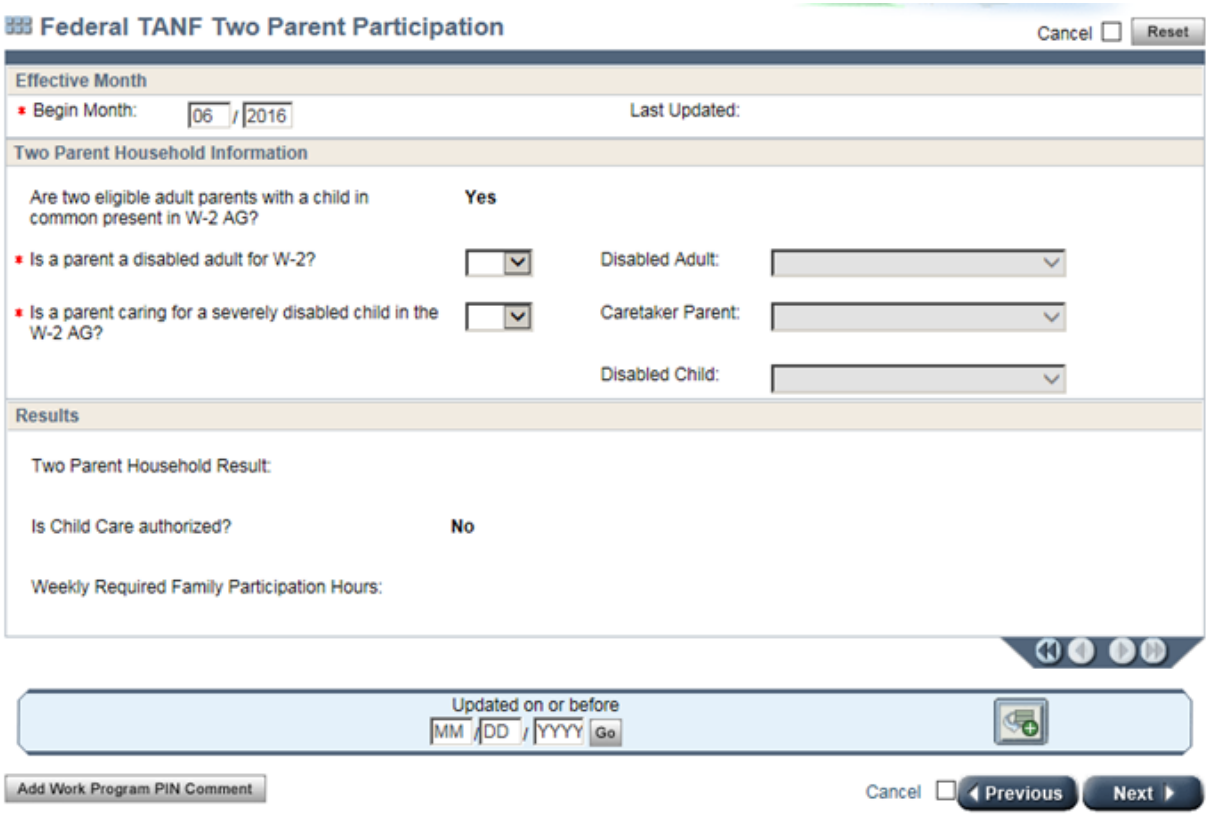
CARES screen WPTP W-2 Two Parent Participation moves the new CWW Two Parent Participation page.

Additions:

- **W-2 Two Parent Participation** – The purpose of this page is to identify which W-2 households meet the federal definition of a two-parent household.

The FEP **must** answer the first two questions on the page. The responses will generate results at the bottom of the page. Results determined are:

- **Two Parent Household Result** Displays as YES only when:
  - There are two Eligible Adult (EA) parents in the W-2 assistance group (AG), and
  - There are no disabled parents for W-2 who are eligible in the W-2 AG (Review W-2 Manual>Glossary for the definition of Disabled Adult), and
  - Neither parent is caring for a disabled child in the W-2 AG, and
  - One parent is in a paid placement.
- **Is Child Care Authorized?** Displays as YES when childcare is authorized for this case based on childcare authorizations recorded in CSAW.
- **Weekly Required Family Participation Hours** This number is calculated based on the two-parent household participation requirements.
- Informational message will show if a parent or child is disabled.



12 W-2 Hold Payments

CARES screen WPHB W-2 Hold Benefits moves to the new CWW W-2 Hold Payments page.

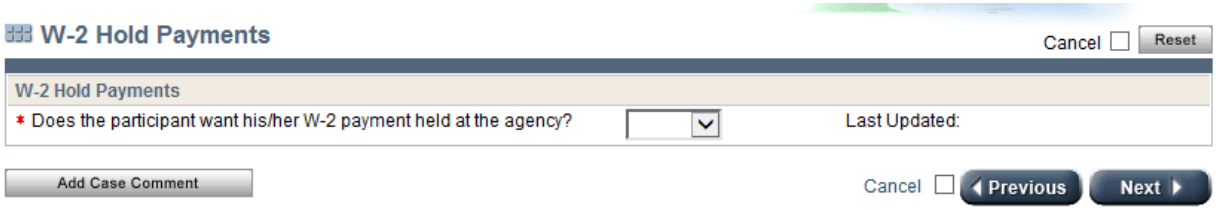
Additions:

- **W-2 Hold Payments** –FEPs **must** complete the **W-2 Hold Payments** page when a W-2 participant requests that his or her W-2 check be placed on hold at the W-2 agency.
- A confirmation letter will be sent to W-2 participants who chose to have his or her W-2 payment held or no longer held.

FEPs cannot place payments on hold if the W-2 participant is currently utilizing EFT for his or her W-2 payment. FEPs should enter a case comment using the Add Case Comment button on this page explaining why the W-2 payment was placed on hold.

The following fields are included on the **W-2 Hold Payments** page:

- Does the participant want his or her W-2 payment held at the agency?
- Last Updated Date



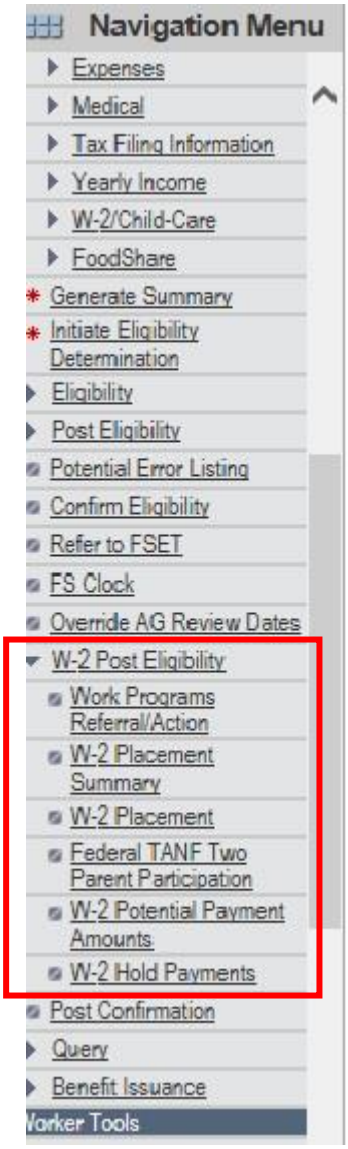
Other Changes

A few other changes related to W-2 improvements will be taking place in CWW.

Navigation Menu

The Navigation Menu displays a new section for Work Programs specific pages that includes the following:

- Referral;
- Vendor Payment;
- W-2 Placement;
- Potential Payments;
- Two Parents; and
- Hold Payments.



Case Summary

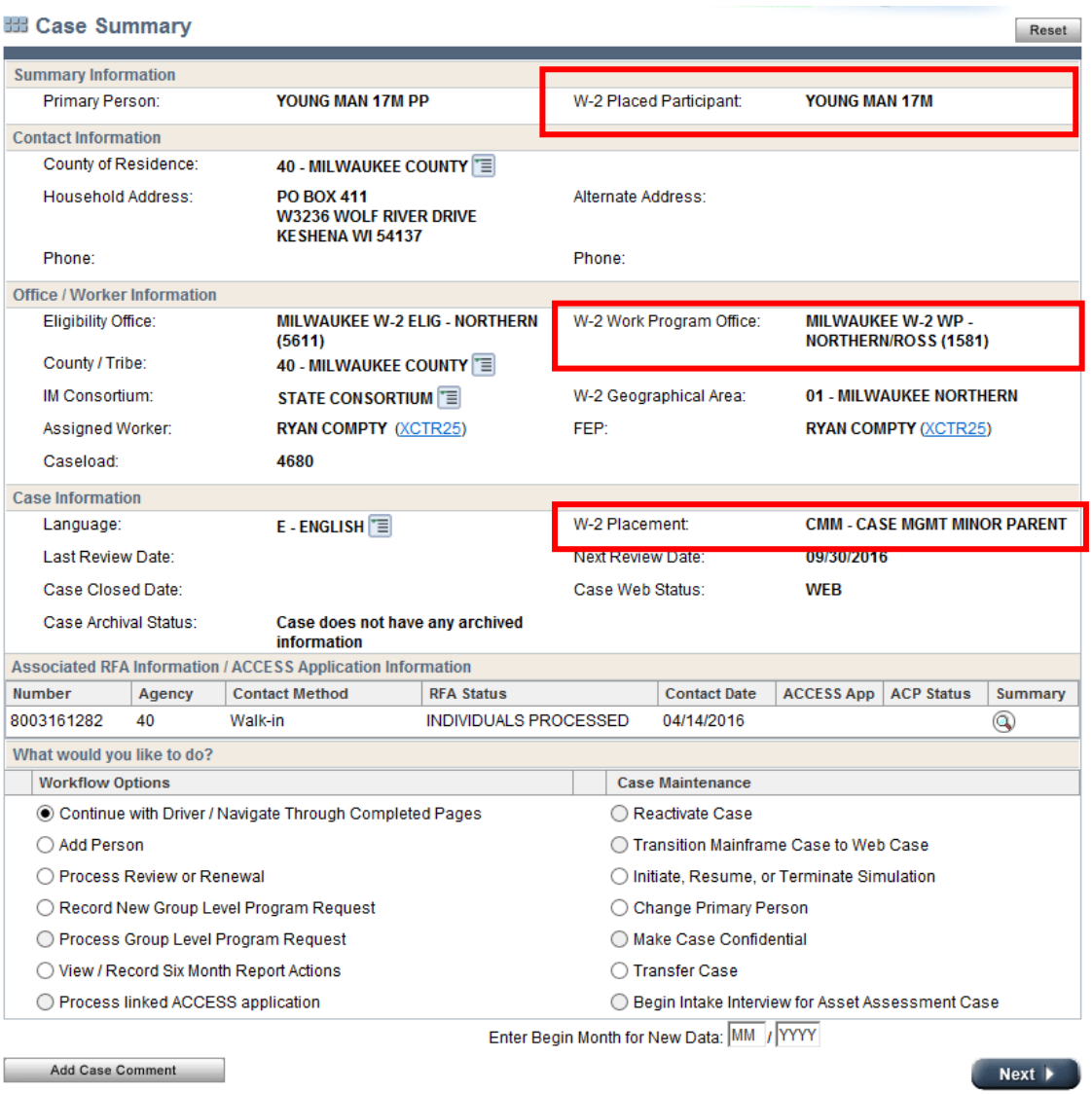
Additions to Informational Display:

- **W-2 Work Program Office** – individual in placement,
- **W-2 Placement** – the current non-ended W-2 placement.

Changes:

- **W-2 Placed Participant** – previously W-2 Participant.

The **W-2 Placement** will display the entire name of the placement; for example, CMF will display as Case Management Follow Up.



Case Summary

Reset

Summary Information

Primary Person:	YOUNG MAN 17M PP	W-2 Placed Participant:	YOUNG MAN 17M

Contact Information

County of Residence:	40 - MILWAUKEE COUNTY		
Household Address:	PO BOX 411 W3236 WOLF RIVER DRIVE KESHENA WI 54137	Alternate Address:	
Phone:		Phone:	

Office / Worker Information

Eligibility Office:	MILWAUKEE W-2 ELIG - NORTHERN (5611)	W-2 Work Program Office:	MILWAUKEE W-2 WP - NORTHERN/ROSS (1581)
County / Tribe:	40 - MILWAUKEE COUNTY		
IM Consortium:	STATE CONSORTIUM	W-2 Geographical Area:	01 - MILWAUKEE NORTHERN
Assigned Worker:	RYAN COMPTY (XCTR25)	FEP:	RYAN COMPTY (XCTR25)
Caseload:	4680		

Case Information

Language:	E - ENGLISH	W-2 Placement:	CMM - CASE MGMT MINOR PARENT
Last Review Date:		Next Review Date:	09/30/2016
Case Closed Date:		Case Web Status:	WEB
Case Archival Status:	Case does not have any archived information		

Associated RFA Information / ACCESS Application Information

Number	Agency	Contact Method	RFA Status	Contact Date	ACCESS App	ACP Status	Summary
8003161282	40	Walk-in	INDIVIDUALS PROCESSED	04/14/2016			

What would you like to do?

Workflow Options	Case Maintenance
Continue with Driver / Navigate Through Completed Pages	Reactivate Case
Add Person	Transition Mainframe Case to Web Case
Process Review or Renewal	Initiate, Resume, or Terminate Simulation
Record New Group Level Program Request	Change Primary Person
Process Group Level Program Request	Make Case Confidential
View / Record Six Month Report Actions	Transfer Case
Process linked ACCESS application	Begin Intake Interview for Asset Assessment Case

Enter Begin Month for New Data: MM / YYYY

Add Case Comment

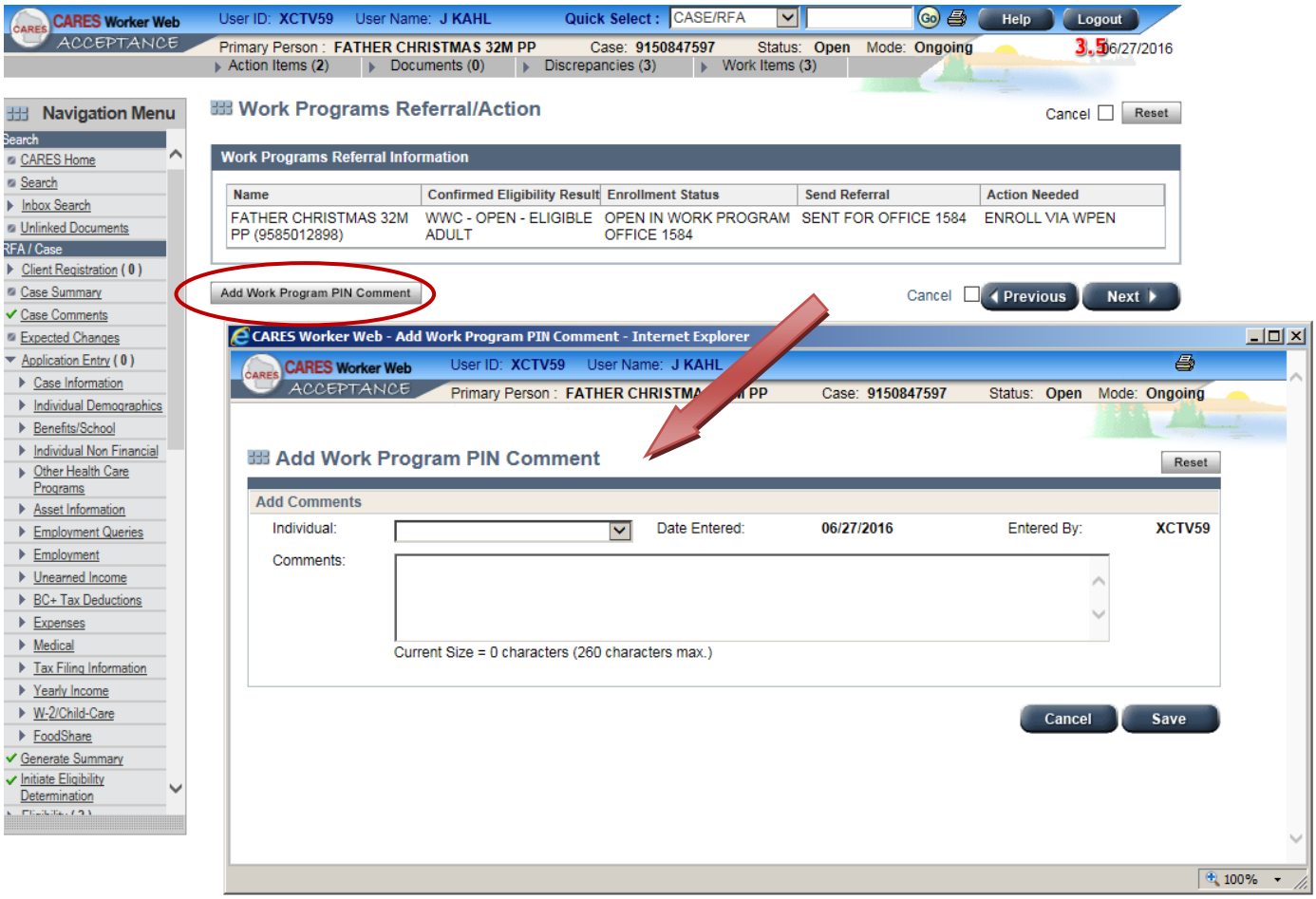
Next

PIN-Based Comments

CWW enhancements support a pop-up window that allows PIN-based comments to be entered from the Work Programs screens. As with the Case Comment pop-up, FEPs are only able to add comments on this page. The comments cannot be viewed or edited. FEPs will be able to select the individual from the drop-down.

The following CWW pages now include a PIN-Based Comments button to access the pop-up window to enter comments:

- Work Program Referral/ Action page (mock-up below)
- W-2 Placement page
- W-2 Placement Summary page
- Federal TANF Two Parent Participation page

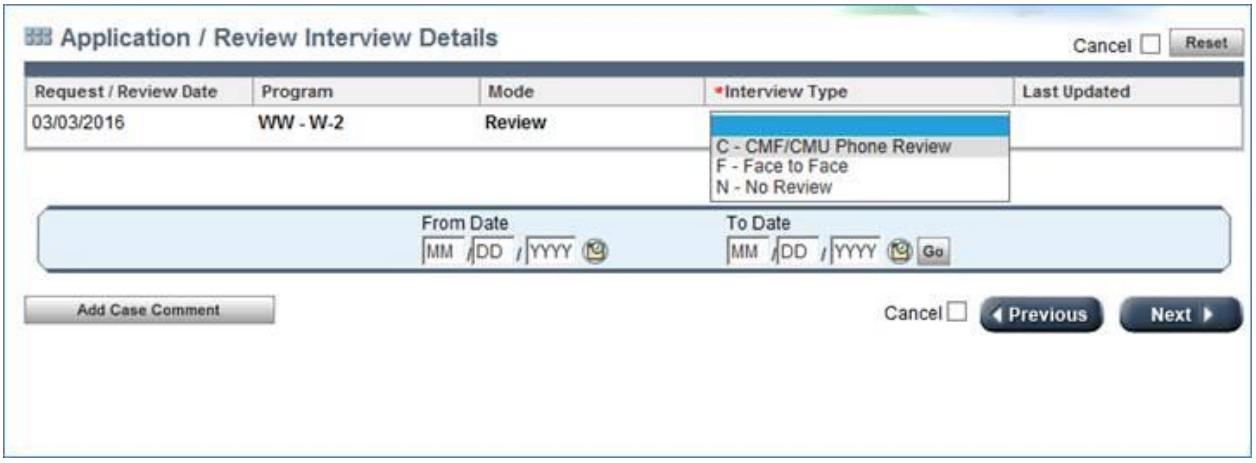


Household Members

New functionality to this page will not allow a member of the W-2 Assistance Group to be deleted if he or she is the owner of an asset designated as being used for W-2 EFT FEPs can code this individual as 15- OUT OF HOME in the Living Arrangement field on the **Current Demographics** page.

Application/Review Interview Details

At the time of eligibility review, if a W-2 participant in a CMF or CMU placement cannot attend the review in person, the FEP can conduct a phone review. The FEP will select C – CMF/CMU Phone Review when the review is conducted.



CWW Generated Notices

There are multiple updates to notices, which will include additional information related to placement, Vendor payment, Estimated/Prorated payment, EFT payment, and Hold Payment information.

All notices will be available to be viewed in Access through the paperless option.

Learnfare

A notice will generate when a W-2 participant is in a paid placement a child is not enrolled in school the following is true and recorded in CWW:

- CM- FAILURE TO COMPLY WITH CASE MANAGEMENT

Liquid Assets

A notice will generate when an EFT begins, changes, or ends to the W-2 participant.

Hold Payments

W-2 participants will receive a notice alerting them when their W-2 payment is being held or is no longer being held.

AELR Placement Notice

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

Case Summary.pdf

The case summary.pdf that is provided to W-2 participants to verify that all information provided is accurate now will include W-2 Placement information.If a placement is made or changed after the initial eligibility run, the FEP will need to go back to the Generate Summary page and click on Add New Information icon to display the new Case Summary with the updated placement information.